

Statistics Without Borders Volunteer Handbook

25 July 2023

Version 9.0

Section 1: Introduction

Welcome to Statistics Without Borders! Statistics Without Borders (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 non-religious, non-political, 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 about how SWB works as well as the expectations 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.

[Section 3](#) describes SWB's mission, vision, and structure. [Section 4](#) describes how SWB projects are run. [Section 5](#) describes SWB's volunteer policies. [Section 6](#) describes SWB's conflict resolution procedure.

Table of Contents

Section 1: Introduction to SWB	Page 2
Section 2: About this Handbook	Page 2
Section 3: What is SWB?	Page 3
Section 4: How SWB Project are Run	Page 6
Section 5: SWB Volunteer Policies	Page 8
Section 6: Conflict Resolution Procedure	Page 11

Section 3: What is SWB?

SWB provides statistical expertise to non-corporate groups who either do not have access to it or cannot afford it, or both. Some of our projects are short-term while others deal with 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 organizations without adequate statistical resources. We strive to make a difference in the world by applying our statistical expertise.

SWB aims to promote welfare through the proper application of statistical principles and best practices where access to such resources is limited. We provide analytical services for public benefit to support goals that are non-religion, non-partisan, and non-personal. SWB assists organizations outside of the for-profit sector. We prioritize organizations with limited or no access to statistical resources.

SWB was founded in 2008 and we have worked on over 200 projects since then. There was already strong interest in 2008 in “pro bono statistics” within the ASA, and SWB was established as an effort within the ASA’s Special Interest Group (SIG) on Volunteerism. SWB initially focused on global health.

By 2010, we had 130 members, and SWB grew to over 1,000 members by 2020. 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. After drafting its Charter, SWB officially became an Outreach Group of the ASA in 2010.

SWB Structure

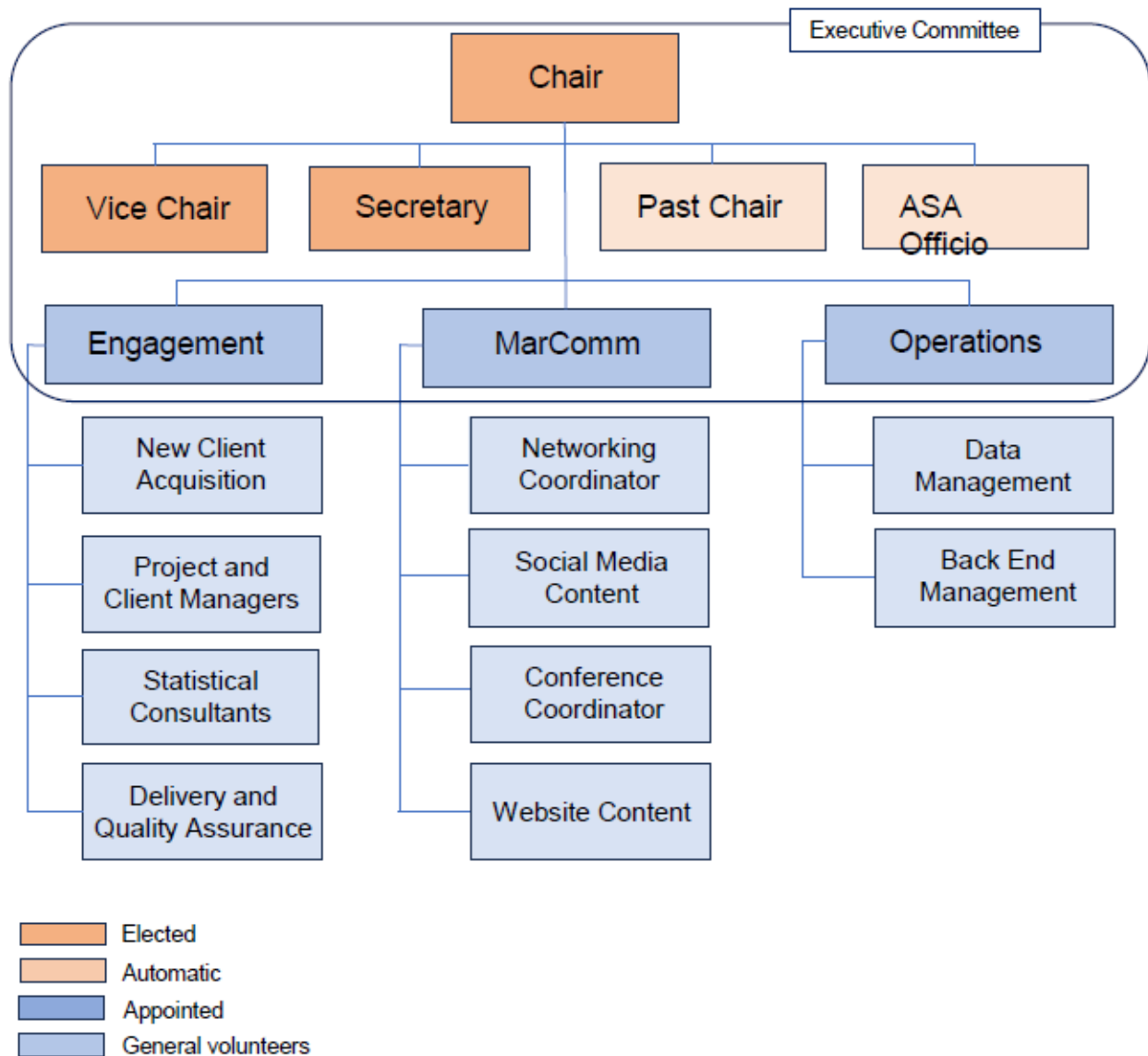


Figure 1: the SWB organizational structure

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

The Executive Committee (EC) oversees both the day-to-day running of the organization and the larger, longer-term goals for SWB. The Chair, Vice Chair, and Secretary positions are elected by the SWB membership every two years. The Engagement, MarComm, and Operations Directors are appointed by the Executive Committee, and when these positions are open, SWB members

are encouraged to volunteer for them. There may also be co-chairs for these positions as they include many responsibilities. The Past Chair position is automatically held by the previous Chair for the 2-year term after their term as Chair is finished. Additionally, the ASA has one representative on the EC. The Past Chair and ASA Officio positions do not have voting rights on the EC.

Who can be an SWB volunteer?

Anyone with statistical knowledge! We have more than 1,000 volunteers from over 30 countries. SWB members have diverse backgrounds 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.

You do not need to have a degree in statistics to volunteer with us. Many of our volunteers have acquired their statistical knowledge through different work areas, and we welcome volunteers who have learned statistics through computer science, health care, psychology, sociology, data science, and all relevant fields where statistics is used.

Students can be SWB volunteers as well. We welcome all volunteers who want to learn more about real-world statistical projects and applications.

Section 4: How SWB Projects Are Run

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.

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 project announcements. Announcements may be tailored to volunteers with specific skill sets based on project needs, so please read project announcements carefully.

Project-level commitment varies widely, from a few hours over a day or two to an ongoing commitment of several hours per week over several months. You may volunteer for as many or as few projects as you would like.

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.

The software and programming languages used in SWB projects are different 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

You can 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, please feel free to discuss them with the Project and Client Manager 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.

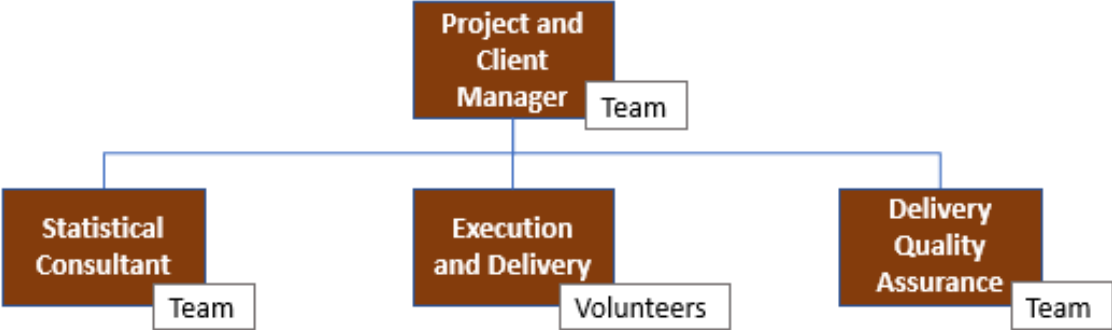
You may be interested in a project which already has several interested volunteer candidates. In these cases, SWB has many different selection criteria, not all of which are related to experience level and technical qualifications of the volunteer. We often give preference to volunteers who have not 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.

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.

Project Team Structure

The usual SWB project team structure consists of project team members (volunteers), one or more Project and Client Managers (PCM), one or more Statistical Consultants (SC), and Delivery Quality Assurance (DQA).



Date: October 2019

Figure 2: The general SWB project team structure

The Project and Client Managers (PCM) are responsible for the overall organization and running of the project. PCMs identify and design projects, select the members of the project team, lead the project team, maintain regular communication with the client and the team members, and ensure the successful completion of the project.

The Statistical Consultants (SC) are subject matter experts brought on to project teams when needed. SCs provide necessary subject-matter expertise, review designs and methodologies, suggest approaches or techniques, and execute parts of projects as needed.

The Delivery and Quality Assurance (DQA) members are responsible for ensuring the projects are finished in accordance with the agreements made with the clients, and that all statistical and analytical decisions were justified. DQA members perform an arm's length audit of projects by checking that what was done for a project satisfies the clients' wishes and is statistically appropriate. The DQA members do not work directly on a project but instead perform a check at the end of a project to ensure that all project requirements were met.

Section 5: SWB Volunteer Policies

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 provide opportunities to work as part of teams, to mentor others, and to learn and evolve in the process of volunteering on projects. We will always work to make the volunteer experience as smooth, organized, and rewarding as possible.

What you can expect from SWB

- (1) **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.
- (2) **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.
- (3) **Respect:** We understand that your time and effort on behalf of SWB is important, and we will ensure that both the clients and the other members of SWB will respect your contributions and treat you in a respectful fashion. We are all volunteers in SWB and our group would not be possible without your contribution.
- (4) **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 Conflict Resolution procedure ([Section 6](#)).

What SWB expects from you

- (1) **Commitment and timeliness.** You will be working as part of a team and for a client. 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! If you do have an issue with completing tasks you are working on for a project, please contact the project PCM as soon as possible.
- (2) **Honor client and project confidentiality.** Data privacy is an important part of statistical work and all SWB volunteers should abide by the [SWB Privacy Policy](#). Follow the project's guidelines on confidentiality and do not discuss project details when it is not appropriate. If you have any questions or concerns, please discuss them with the project's PCM.
- (3) **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 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.

(4) 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. It is your responsibility to make sure you can afford and are insured for any activities you undertake as part of your SWB duties.

SWB Volunteer Policies

SWB volunteers must abide by all SWB policies. These include the [SWB Volunteer Code of Conduct](#), the [Data Privacy Policy](#), and the ASA [Ethical Guidelines for Statistical Practice](#). Please ensure that you have read these policies and that you understand them. You should have received copies of the Code of Conduct and the Data Privacy Policy when you filled out the SWB membership sign-up form. If you did not receive these or would like to read them again, they [are available on the SWB website](#).

Coordination and Communication

The unexpected can happen and circumstances change. If you need to take a step back in volunteering (temporarily or long-term), it is important to coordinate with others on your team. Please notify your PCM (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.

We understand that volunteering cannot take priority over real life concerns such as work or family or your health. Please do not feel that you cannot leave a volunteering opportunity with SWB when it is needed.

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 in a timely fashion if your response is requested or required.

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. Volunteers are encouraged to share that they have volunteered with SWB in their resumes, CVs, and/or their LinkedIn profiles. Volunteers may share or publish details about their work with SWB only with express permission of both MarComm and any clients involved. To secure this permission, begin by contacting SWB MarComm at statisticswithoutborders@gmail.com.

We give permission for our 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. We request that our logo should not be used in any context other than for informational or comparative purposes without seeking further permission. Please contact SWB MarComm 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. You can update your profile through our [webpage](#). You can update any information that is out of date or incorrect in your member profile, including your email address.

Ending Your SWB Membership

SWB volunteers are not removed from our database unless specifically requested to be removed. Volunteers who do not renew their membership annually are marked as “not active” members, and their information is not removed from the SWB membership database. If you would like to have your information completely removed from the SWB membership database, please contact SWB Volunteer Management at statisticswithoutborders@gmail.com.

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 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.

Section 6: Conflict Resolution Procedure

Our goal is to make working with SWB a positive experience for everyone involved. However, it may be the case that a conflict arises. We have a procedure to ensure that problems between volunteers are fairly and quickly resolved. We strive to be responsive to all volunteer concerns and to create an environment that is protective of human dignity and trust.

Conflict Resolution Procedure

If you have experienced threats, violence, discrimination, or sexual harassment, please report this immediately by filling out the [conflict reporting form](#), emailing the [highest-ranking member of SWB](#) Executive Committee who is not involved in the conflict, emailing us at statisticswithoutborders@gmail.com, or any combination of these actions with which you are comfortable.

Step 1: If the conflict is of a different nature, then we ask that you first attempt to resolve the conflict informally by arranging a discussion with the volunteer with whom you have a conflict if you are comfortable doing so. You may ask a supervisory volunteer to informally mediate a conflict. This may be the person within SWB to whom you report. The value of informally resolving conflict is that the parties work in partnership to arrive at and agree upon a mutually acceptable resolution. A conflict is successfully resolved using this informal procedure if the parties agree upon a mutually acceptable resolution.

Step 2: If one or more parties feels that the conflict was not resolved, they should proceed by submitting the [conflict reporting form](#). This form will be confidentially shared with the Volunteer Management Director. The Volunteer Management Director will identify an appropriate volunteer (the “Mediator”) to formally mediate a meeting between the volunteers.

Step 3: The Mediator will respond in a timely fashion. This response may include requests for more information or to set up a meeting between the volunteers. The intent of this discussion and/or meeting with the Mediator is to find an official resolution that is mutually satisfactory to the volunteers involved in the conflict.

Step 4: If a discussion with the Mediator does not result in a satisfactory outcome, the volunteer should renew the complaint with the Volunteer Management Director by submitting an [updated conflict reporting form](#). The Volunteer Management Director will then schedule meetings with all relevant parties and attempt to resolve the conflict that is mutually satisfactory to all parties.

Step 5: If a satisfactory outcome still has not been reached, the Volunteer Management Director will determine a plan that attempts to limit the conflict as much as possible, and submit it to the Executive Committee (excluding any members of the Executive Committee involved in the conflict) for approval. The decision of the Executive Committee is final. The complaint is considered settled on the basis of the final decision and cannot be appealed.

Confidentiality

SWB will make every reasonable effort to protect the confidentiality of information received in connection with volunteer conflicts. Volunteers will share information only as appropriate and necessary in order to address and resolve the concerns at issue and/or prevent the recurrence of similar situations.

Prohibition of Retaliatory Action

Any volunteer who is involved with the conflict resolution procedure shall not be harassed, intimidated, or otherwise penalized for using the procedure. If, as a result of using conflict resolution, a volunteer believes that retaliatory actions have been taken, the volunteer should inform the Volunteer Management Director, who is responsible for informing the SWB Executive Committee.

Scope

This conflict resolution procedure applies to all volunteers of SWB and to volunteering-related conflicts between volunteers. It does not apply to conflicts between volunteers and clients. This procedure will be applied equally regardless of national origin, race, gender, religion, and sexual orientation.