Voluntary Operational Research

DAVID SIMS and TIM SMITHIN
School of Management, University of Bath

Operational Research has traditionally been carried out in organizations which are able and willing to pay for it: this tends to restrict it to the larger industrial, commercial or governmental bodies. In this paper we reflect on an O.R. project done on behalf of a group of charities, to whom, as with most voluntary organizations, the skills of operational researchers are not usually available.

It seems likely that voluntary organizations will have an increasing role as leisure time increases, and in any case the widening scope and complex context of their activities means that they could benefit from the kind of help that operational researchers can give. At the same time, O.R. workers who care about a particular voluntary organization may want to offer their skills to it. However, the skills of operational researchers are not as obviously relevant to voluntary organizations as is the professional expertise of lawyers and accountants. Undertaking O.R. projects as a voluntary helper rather than as a paid consultant, and in voluntary organizations rather than the more usual clients for O.R., has significant implications for the approach and methods used.

We discuss these issues in the light of our recent experiences of carrying out ‘voluntary Operational Research’.

INTRODUCTION

THIS PAPER is about the difference between two forms of Operational Research. Voluntary Operational Research is carried out for no charge by a person whose involvement with a client organization is based on choice and wish, without any expectation of recompense. We contrast this with paid Operational Research which is done either for financial reward or for something which bears on financial reward in the longer term, such as making your job safer, getting your name better known or advancing your career.

This paper is based on the authors’ experiences of a number of different organizations that interest them and to which they give some sort of help, although some people might not necessarily label them O.R. The kinds of organizations that we are thinking of include national and international charities, local community organizations, political parties, churches, trade unions, local government, the health service and football clubs. None of these organizations is entirely voluntary, or entirely pecuniary. All of them depend on some mixture of paid employees and volunteer members who contribute time and energy without monetary recompense. Even those two categories are not clearly distinct, as there are various forms of partial recompense such as expenses payments, honoraria or accommodation. In particular, we reflect here on a recent research project in which we attempted to help three charities (two predominantly concerned with medical research and handicap and the third with disaster relief) and a fund raising organization. In the project we were concerned with developing models or maps of the beliefs of senior officers in the charities about why people gave to their charity.

This paper considers first the implications of selling O.R.—implications that are often hidden by the fact that O.R. is rarely discussed or written about except as something which is either sold or undertaken as a part of employment. It goes on to talk about voluntary Operational Research and some of the implications of conducting O.R. where it is not done for money or as part of employment. It then looks more closely at the comparisons between giving and selling O.R. In some cases this is by no means the sharpest of distinctions; some ‘voluntary Operational Research’ can be done for highly instrumental reasons, such as to prepare material for a conference paper, while some ‘paid Operational Research’ may be done for its own sake, for example where an operational researcher puts in some time and energy on conducting a study for someone

An earlier version of this paper was presented at the Young O.R. Conference, Coventry, December 1980.
whose cause he cares about in his organization but who is not in a position to repay the favour.

The paper next considers the option of giving Operational Research or giving some other commodity or service to an organization that you care about. Why is it that, whilst many operational researchers are interested in some more or less voluntary organizations, it does not often seem to be their O.R. skills that they contribute to those organizations? Finally, the paper considers suggestions that while work will still continue to be as important a part of people’s lives as ever, employment may well reduce considerably in importance. The familiar and comforting framework of employment and buyer-seller relationships may not play as important a role in Operational Research in the future as it has in the past. The time may come when voluntary organizations will play a more important role than they have in the past and when the ‘institutional economy’ will form a less important part of working life. If this is the case, then rethinking the value, the evaluation and the practice of O.R. for a voluntary context is a matter of some urgency for its practitioners, and particularly the younger ones amongst them.

**O.R. FOR SALE**

Many operational researchers work for institutional employers who buy their labour from them; that is, they recompense them in money for the time and effort spent in Operational Research. The assumption that buying and selling will underly the relationship between consultant and client is so deep-seated that it is rarely mentioned in writing about O.R.; it is taken to be too self-evident to talk about.

On the whole, operational researchers make their living by selling O.R. (a statement which may not sound nearly so tautological in ten or fifteen years time as it does now). They seek to give their clients what both parties consider to be good value for money. This may be a quite direct relationship, as with external consultants and consulting teams: they come in, do their work in their own preferred style, send in an invoice and depart. Their relationship is temporary, and at a particular point the sale can be regarded as complete, but they will usually also have wanted to do the work in such a way that the client comes back to buy more. This outcome is more likely if they can leave the client with a good impression of the value that he has received for money. The client is likely to be a person or a group set within an organization, and the impression that they have of the value that they have received for their organization’s money will be affected by, among other things, the steps that the consultant takes to give them something to show other members of their organization what good value they have received. If the client has a smart report from the consultants to show his boss, that may help the boss to conclude that he has had a competent and professional service and therefore that it was worth it; this may increase the consultant’s chances of making another sale to him or to other persons or groups in his organization. For the consultant, it becomes important for him to manage his saleability along with other aspects of his relationship with the client.

Making sales is no less important to an internal consultant. As a member of a staff function in an organization, he may feel himself to be always potentially vulnerable—one of those who might be disposed of in a financial emergency—and thus he may see his livelihood as being as dependent on his sales of his services as is that of the external consultant, albeit with a greater time lag. The internal operational researcher may need to have a certain amount of budgetary recognition of his services and a sufficient clout for them that he is not seen to be superfluous. He may also be particularly interested in making sales of his services to certain influential groups or individuals, who may then be able to help secure his position during the next company crisis.

Much Operational Research, then, is done with a concern that the client ends up feeling that it was good value for money. One well known journal in this field has as part of its editorial policy: “A lead article will have an absolute requirement of either a provable savings of cost or a provable increase in profits to the enterprise.” This criterion for the journal makes the assumption that O.R. is something that can be bought and