VOLUNTEER AND SERVICE USER MATCHING PROCEDURE

PRN-147: Volunteer and Service User Matching Procedure
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Trading/Business Name: CAREHOPES
Company Registration Number: 15556946
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1. Purpose

This procedure outlines the process for safely and effectively matching volunteers with service users receiving companionship and wellbeing support.

The organisation recognises that successful matching is essential to:

- Building positive and supportive relationships.
- Promoting wellbeing and independence.
- Reducing social isolation.
- Supporting service user safety.
- Enhancing volunteer satisfaction and retention.
- Achieving positive outcomes.

Matching decisions should always place the needs, wishes, safety, and wellbeing of the service user at the centre of the process.

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2. Scope

This procedure applies to:

- Volunteer Coordinators
- Managers
- Employees involved in allocation decisions
- Volunteers providing companionship and wellbeing support

It applies to all service users receiving volunteer-supported services.

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3. Key Principles

The matching process will be:

Person-Centred

Reflecting the preferences, interests, and needs of the service user.

Safe

Taking account of safeguarding and risk information.

Inclusive

Respecting diversity and individual circumstances.

Transparent

Matching decisions will be supported by clear rationale.

Flexible

Recognising that relationships may need adjustment over time.

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4. Purpose of Matching

The matching process aims to identify a volunteer who is likely to:

- Build a positive relationship with the service user.
- Support agreed wellbeing outcomes.
- Meet identified communication needs.
- Promote participation and inclusion.
- Respect boundaries and safeguarding requirements.

Successful matching helps create meaningful and sustainable support relationships.

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5. Information Required Before Matching

Before any match is considered, the following information should be available:

Service User Information

- Personal preferences.
- Interests and hobbies.
- Communication requirements.
- Accessibility requirements.

- Support goals.
- Risk assessment information.
- Availability.

Volunteer Information

- Skills and experience.
- Interests and hobbies.
- Availability.
- Preferred volunteering activities.
- Training completion.
- Risk considerations.
- Previous volunteering experience.

Matching decisions should be informed by assessment information rather than assumptions.

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6. Service User Preferences

Where possible, service users should be consulted regarding:

- Preferred meeting times.
- Activity interests.
- Communication preferences.
- Community involvement goals.
- Cultural preferences.
- Any concerns regarding support arrangements.

Preferences should be considered wherever reasonably practicable.

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7. Volunteer Preferences

Volunteers should also have opportunities to discuss:

- Preferred types of support.
- Areas of interest.
- Availability.
- Travel considerations.

- Confidence and experience levels.

Volunteer wellbeing and sustainability should be considered during matching.

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8. Compatibility Considerations

When matching, consideration may include:

- Shared interests.
- Similar hobbies.
- Personality compatibility.
- Availability.
- Communication styles.
- Support objectives.

Compatibility can contribute positively to relationship development.

However, decisions should remain professional and evidence-based.

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9. Risk Assessment Considerations

Risk information must always be reviewed before a match is approved.

Considerations may include:

- Safeguarding concerns.
- Lone working risks.
- Complex support needs.
- Environmental risks.
- Aggressive behaviour history.
- Mobility considerations.

Risk information should inform support planning and supervision arrangements.

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10. Equality and Inclusion

Matching decisions must be fair, objective, and inclusive.

The organisation will not discriminate on the basis of:

- Age

- Disability
- Race
- Religion or belief
- Sex
- Sexual orientation
- Gender reassignment
- Marriage and civil partnership
- Pregnancy and maternity

Individual preferences may be considered where they relate to wellbeing, safety, communication, or cultural needs.

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11. Cultural and Language Considerations

Where appropriate, matching may consider:

- Cultural background.
- Shared language.
- Faith considerations.
- Community connections.

These factors may enhance communication and engagement but should not override safeguarding or suitability considerations.

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12. Accessibility Considerations

Matching decisions should consider:

- Hearing impairments.
- Visual impairments.
- Mobility requirements.
- Learning disabilities.
- Communication support needs.

Appropriate adjustments should be made wherever possible.

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13. Volunteer Capacity and Availability

Before confirming a match, coordinators should ensure:

- The volunteer has sufficient availability.
- Travel requirements are realistic.
- Existing commitments can be maintained safely.
- Support arrangements are sustainable.

Over-allocation of volunteers should be avoided.

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14. Proposed Match Review

Before a match is approved:

Step 1

Review assessment information.

Step 2

Review volunteer profile.

Step 3

Review risk assessments.

Step 4

Consider compatibility factors.

Step 5

Seek management approval where required.

A record of the matching rationale should be maintained.

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15. Introduction Planning

Once a match is identified:

- An introduction meeting should be arranged.
- Expectations should be discussed.
- Boundaries should be explained.
- Contact arrangements should be agreed.

Introductions should be conducted in a supportive and professional manner.

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16. Initial Introduction Meeting

The introduction meeting should:

- Introduce the volunteer and service user.
- Explain roles and expectations.
- Discuss interests and goals.
- Clarify frequency of contact.
- Explain reporting and support arrangements.

The meeting should provide an opportunity for both parties to ask questions.

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17. Trial Period

Where appropriate, a trial period may be used.

A trial period allows:

- Assessment of compatibility.
- Identification of concerns.
- Early support and adjustments.

The organisation may review the suitability of the match during this period.

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18. Monitoring New Matches

Following allocation:

- Early contact should be maintained.
- Feedback should be sought.
- Any concerns should be identified promptly.
- Wellbeing and safety should be monitored.

Early monitoring helps support successful relationships.

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19. Ongoing Review of Matching Arrangements

Matching arrangements should be reviewed:

- During supervision.
- During service user reviews.

- Following concerns or incidents.
- Following changes in circumstances.

Changes may require adjustments to support arrangements.

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20. Managing Concerns About a Match

Concerns may include:

- Communication difficulties.
- Lack of engagement.
- Boundary issues.
- Availability concerns.
- Personality conflicts.
- Safety concerns.

Concerns should be discussed openly and managed promptly.

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21. Rematching Procedure

A match may be reviewed and changed where:

- Support needs change.
- A volunteer leaves.
- Significant concerns arise.
- Either party requests a review.
- Compatibility issues cannot be resolved.

The rematching process should be managed sensitively and respectfully.

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22. Ending a Match

A match may end because:

- Support goals are achieved.
- Service user circumstances change.
- Volunteer availability changes.
- Safeguarding concerns arise.

- Service closure occurs.

Where possible:

- Adequate notice should be given.
- Supportive communication should be provided.
- Alternative arrangements should be explored.

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23. Recording Match Decisions

Records should include:

- Date of allocation.
- Volunteer assigned.
- Service user assigned.
- Matching rationale.
- Risks identified.
- Adjustments agreed.
- Review arrangements.

Records must be maintained securely.

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24. Safeguarding Considerations

Throughout the matching process:

- Safeguarding remains a priority.
- Risk information must be considered.
- Professional boundaries must be maintained.
- Concerns must be reported immediately.

No match should proceed where unacceptable risks remain unmanaged.

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25. Confidentiality

Information shared during matching must be:

- Relevant.
- Necessary.

- Secure.
- Shared only with authorised individuals.

Personal information should only be disclosed on a need-to-know basis.

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26. Matching Procedure Flowchart

Service User Assessment Completed

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Volunteer Available

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Review Service User Needs

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Review Volunteer Profile

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Risk Assessment Review

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Compatibility Assessment

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Suitable Match Identified

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Introduction Meeting

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Trial Period (if required)

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Support Commences

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Monitoring and Review

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Continue, Adjust or Rematch

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27. Case Study

Scenario: Matching a Volunteer with an Isolated Older Adult

An 80-year-old service user has recently become socially isolated following bereavement and wishes to increase community involvement.

Assessment Findings

- Enjoys gardening and local history.
- Prefers daytime visits.
- No significant safeguarding concerns.

Volunteer Profile

- Retired volunteer with interests in gardening.
- Available during weekdays.
- Completed all required training.

Action Taken

- Compatibility reviewed.
- Introduction arranged.
- Trial period agreed.
- Ongoing monitoring completed.

Outcome

A positive companionship relationship develops, leading to increased social engagement and improved wellbeing.

Learning Point

Carefully planned matching supports stronger relationships and better outcomes.

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28. Responsibilities

Volunteer Coordinator

Responsible for:

- Coordinating matching decisions.
- Reviewing information.
- Arranging introductions.
- Monitoring allocations.

Managers

Responsible for:

- Providing oversight.
- Reviewing complex matches.
- Managing risks.
- Supporting rematching decisions.

Volunteers

Responsible for:

- Participating appropriately in the matching process.
- Respecting professional boundaries.
- Reporting concerns promptly.

Service Users

Responsible for:

- Sharing relevant preferences and feedback.
- Participating in reviews where possible.

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29. Monitoring and Quality Assurance

The organisation will monitor:

- Match success rates.
- Volunteer retention.
- Service user satisfaction.
- Concerns and complaints.
- Safeguarding incidents.
- Rematching activity.
- Outcome achievement.

Findings will be used to improve allocation and volunteer support processes.

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30. Review Arrangements

This procedure will be reviewed:

- Annually.
- Following safeguarding reviews.
- Following significant incidents.
- Following service user feedback.
- Following volunteer feedback.
- Following changes in legislation or best practice.

Related Policies

- Volunteer Management Policy
- Person-Centred Support Policy
- Adult Safeguarding Policy
- Lone Working Policy
- Service User Referral, Assessment and Allocation Procedure
- Service User Review and Outcome Monitoring Procedure
- Accessibility and Inclusive Communication Policy
- Code of Conduct Policy

Associated Policies

- Volunteer Management Policy
- Person-Centred Support Policy
- Adult Safeguarding Policy
- Service User Referral, Assessment and Allocation Procedure
- Lone Working Policy