Client Engagement Policy

Policy Title: PRN-016: Client Engagement Policy
Company Name: AI Auto-Tech Ltd
Trading/Business Name: CAREHOPES
Company Registration Number: 15556946
SIC Code: 88100 – Social Work Activities Without Accommodation for the Elderly and Disabled
Email: admin@carehopes.com
Version Number: V01 20260815
Date of Review: (August 2026)

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1. Introduction

CAREHOPES (TC) is committed to fostering meaningful, respectful, and safe engagement with all clients and sponsors. This Client Engagement Policy outlines how TC interacts with service users, families, organisations, and stakeholders throughout the companionship journey.

Our engagement approach is rooted in:

- dignity
- respect
- compassion
- independence-promotion
- safeguarding
- professional boundaries
- clear communication

This policy ensures that every client receives consistent, high-quality engagement that aligns with TC's values and operational standards.

2. Purpose of the Policy

The purpose of this policy is to:

- define how TC engages with clients and sponsors
- establish communication expectations
- outline professional boundaries for companions
- ensure safe, respectful, and inclusive interactions

- support personalised companionship plans
- maintain consistency across all client touchpoints
- protect TC's contractual and safeguarding framework

3. Who This Policy Applies To

This policy applies to:

- service users receiving companionship
- individual and family sponsors
- organisational sponsors
- companions and volunteers
- TC staff and administrators
- affiliates and referral partners (for onboarding)

4. Principles of Client Engagement

TC's client engagement approach is guided by the following principles:

4.1. Dignity and Respect

Every client is treated with kindness, patience, and compassion.

4.2. Independence Promotion

TC encourages independence rather than dependency.

4.3. Professional Boundaries

Companions must maintain clear boundaries at all times.

4.4. Transparency

Clients receive clear information about services, expectations, and limitations.

4.5. Safety and Safeguarding

Engagement must prioritise client wellbeing and risk management.

4.6. Consistency

Clients receive reliable, predictable engagement across all TC interactions.

5. Client Engagement Expectations

Clients and sponsors can expect TC to:

- listen attentively

- communicate clearly and respectfully
- provide companionship aligned with the companionship plan
- offer reasonable adjustments for accessibility
- respond promptly to enquiries
- maintain confidentiality
- uphold safeguarding standards
- provide professional, compassionate companions
- support rescheduling where needed

6. Client Responsibilities

Clients and sponsors agree to:

- communicate through official TC channels
- provide accurate information
- respect companions' professional boundaries
- avoid requesting services outside the companionship plan
- endorse completed checklists honestly
- notify TC of changes in risk factors
- maintain a safe environment for companionship
- avoid negotiating terms with companions

7. Companion Engagement Standards

Companions must:

- treat every client with dignity and respect
- listen before speaking
- act with kindness and patience
- promote independence
- maintain professional boundaries
- respect confidentiality
- follow the companionship plan
- complete the Companion Completion Checklist

- avoid discussing contract terms, fees, or refunds
- refer all service-related questions to TC
- avoid sharing personal contact details
- avoid accepting direct booking requests

These standards are reinforced through the **Companion Charter**.

8. Communication Rules

8.1. Official TC Channels

All communication regarding:

- bookings
- cancellations
- rescheduling
- complaints
- contract terms
- service changes

must occur through TC's official communication channels.

Companions and volunteers must not:

- negotiate terms
- confirm bookings
- discuss fees
- provide personal contact details
- act as communication intermediaries

8.2. Response Times

TC aims to respond within:

- **24 hours** for general enquiries
- **4 hours** for urgent matters
- **10 working days** for formal complaints

9. Engagement During Sessions

During companionship sessions, companions will:

- engage in agreed activities
- support social interaction
- encourage independence
- assist with non-clinical mobility
- accompany clients to GP appointments (where applicable)
- maintain safety and dignity
- avoid activities outside the companionship plan

Clients must respect companions' boundaries and avoid inappropriate requests.

10. GP Appointment Engagement

TC prioritises GP appointments where possible.

Companions will:

- accompany clients to appointments
- support communication where appropriate
- maintain confidentiality
- avoid clinical interpretation or advice

If a companion cannot attend:

- TC will help reschedule the GP appointment
- this does **not** constitute breach of contract

11. Engagement with Organisational Sponsors

Organisations may:

- request updates
- provide risk information
- replace service users under contract rules
- request adjustments to companionship plans

Organisations must:

- communicate through official TC channels
- avoid negotiating terms with companions
- provide authorised contacts

- support safeguarding procedures

12. Safeguarding Engagement

TC will:

- assess risk factors
- respond to safeguarding concerns
- escalate issues appropriately
- maintain confidentiality
- adjust companionship plans where needed

Clients and sponsors must cooperate with safeguarding investigations.

13. Engagement During Incidents

If an incident occurs:

- companions will report it immediately
- TC will document and review the incident
- sponsors will be notified where appropriate
- TC may adjust the companionship plan
- TC may reassign companions
- TC may suspend services if risks are identified

Refusal to endorse completed checklists will be recorded as an incident.

14. Engagement Limitations

TC may limit engagement due to:

- companion availability
- environmental risks
- severe weather
- public safety concerns
- organisational changes
- safeguarding investigations
- relocation outside England and Wales

TC will communicate limitations promptly.

15. Complaints and Feedback

Clients may submit complaints or feedback through official TC channels.

TC commits to:

- acknowledging complaints
- reviewing concerns within 10 working days
- documenting outcomes
- adjusting engagement processes where necessary
- escalating complex cases to governance or board review

16. Amendments to Client Engagement Policy

TC may update this policy to reflect:

- operational improvements
- legal changes
- new services
- governance decisions

Updates will be communicated through official TC channels.