Companion Completion Checklist

Policy Title: PRN-024: Companion Completion Checklist
Company Name: AI Auto-Tech Ltd
Trading/Business Name: CAREHOPES
Company Registration Number: 15556946
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1. Introduction

The Companion Completion Checklist is a core quality-assurance tool used by CAREHOPES (TC) to ensure that companionship sessions are delivered safely, consistently, and in alignment with each client's companionship plan.

This checklist is structured using the **MoSCoW prioritisation framework**, allowing TC to:

- define deliverables clearly
- measure fulfilment objectively
- support the Agile 80% completion rule
- accommodate human variability and real-world constraints
- encourage continuous improvement
- maintain professional boundaries and safeguarding standards

The checklist is completed **after every session** by the companion and verified by TC.

2. Purpose of the Checklist

The checklist ensures:

- clarity of deliverables
- consistency across sessions
- objective measurement of fulfilment
- protection against subjective expectations
- alignment with the companionship plan
- documentation for audits, safeguarding, and governance

- fairness for companions and clients
- realistic service delivery based on Agile principles

3. MoSCoW Prioritisation Framework

The checklist is divided into four categories:

M — Must-Have Deliverables

Essential activities required for safety, wellbeing, and contractual fulfilment.

S — Should-Have Deliverables

Important activities that significantly enhance the session but are not critical for safety.

C — Could-Have Deliverables

Optional activities that add value but are not required for fulfilment.

W — Won't-Have Deliverables

Activities intentionally excluded due to boundaries, risk, or contractual limitations.

Each category includes **manual entry fields** because companionship is person-specific and must adapt to individual needs.

4. Agile 80% Completion Rule

TC uses an Agile delivery mindset to ensure realistic, human-centred fulfilment.

A session is considered:

- **Done**
- **Good**
- **Fulfilled**
- **Completed**

when **at least 80% of Must-Have and Should-Have deliverables** are achieved.

The remaining **20% outstanding deliverables** may be:

- completed later the same day, or
- improved upon in subsequent sessions.

This approach recognises:

- human variability
- environmental unpredictability

- mobility challenges
- public transport delays
- client mood changes
- bottlenecks and risks
- operational constraints

This preparedness plan makes TC a **realistic and trusted organisation** that avoids unrealistic promises.

5. Companion Completion Checklist (MoSCoW Categories)

Below is the official checklist structure. TC staff, companions, and organisational sponsors will manually fill in the elements under each category based on the client's companionship plan.

M — Must-Have Deliverables (Essential)

These are critical for safety, wellbeing, and contractual fulfilment.

Examples (to be customised per client):

- Safe arrival and safe departure
- Basic wellbeing check
- Required mobility support (non-clinical)
- GP appointment attendance (if scheduled)
- Safeguarding observations
- Completion of essential companionship activities
- Documentation of risks or incidents

Manual Entry Fields:

- Must-Have Deliverable 1: _____
- Must-Have Deliverable 2: _____
- Must-Have Deliverable 3: _____
- Must-Have Deliverable 4: _____
- Must-Have Deliverable 5: _____

S — Should-Have Deliverables (Important)

These significantly enhance the session but are not critical for safety.

Examples (to be customised per client):

- Social engagement activities
- Community participation
- Wellbeing routines
- Independence-promoting tasks
- Communication support
- Emotional reassurance

Manual Entry Fields:

- Should-Have Deliverable 1: _____
- Should-Have Deliverable 2: _____
- Should-Have Deliverable 3: _____
- Should-Have Deliverable 4: _____

C — Could-Have Deliverables (Optional)

These add value but are not required for fulfilment.

Examples (to be customised per client):

- Optional social activities
- Additional wellbeing tasks
- Extended conversation time
- Optional community outings
- Extra support with hobbies

Manual Entry Fields:

- Could-Have Deliverable 1: _____
- Could-Have Deliverable 2: _____
- Could-Have Deliverable 3: _____

W — Won't-Have Deliverables (Excluded)

These activities are intentionally excluded due to:

- professional boundaries
- risk factors

- safeguarding concerns
- contractual limitations
- non-clinical restrictions

Examples:

- medical care
- personal care (unless contracted)
- financial advice
- legal advice
- contract negotiation
- private contact exchange
- activities outside companionship plan

Manual Entry Fields:

- Won't-Have Deliverable 1: _____
- Won't-Have Deliverable 2: _____
- Won't-Have Deliverable 3: _____

6. Companion Documentation Requirements

After each session, companions must:

- complete the MoSCoW checklist
- document deliverables achieved
- record any missed deliverables
- explain reasons for missed deliverables
- note any safeguarding concerns
- submit the checklist to TC
- avoid discussing checklist results with clients
- maintain professional boundaries

7. Client/Sponsor Endorsement

Clients or sponsors may endorse the checklist by:

- confirming deliverables completed

- providing feedback
- noting concerns
- requesting adjustments to future sessions

Refusal to endorse the checklist is recorded as an incident and reviewed by TC.

8. Quality Assurance

TC uses the checklist for:

- service verification
- safeguarding oversight
- companion supervision
- organisational reporting
- audits and governance reviews

The checklist ensures objective evaluation based on the **80% rule**, not subjective expectations.

9. Amendments to This Policy

TC may update this policy to reflect:

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

Updates will be communicated through official TC channels.