



Caring Connections 'Matchmaker, Matchmaker, Make Me a Volunteer Match'

Getting to Know the Client

Onboarding Stage	Direct Information	Indirect Information
Referral <i>The referral typically happens over the phone and are most often made by case managers, primary care providers, behavioral health care providers, social workers, community health care workers, family members, or self-referral.</i>	<ul style="list-style-type: none">• Does the individual meet program requirements? (over 60 and lives in service area)• Do they have serious and persistent mental illness or chronic mental health concerns?• If so, are they connected to counseling or behavioral health resources?• Do they have a cognitive impairment, dementia, or a disability?• Are they interested in socializing?	N/A
Initial Call <i>The initial call typically happens over the phone with the Program Manager.</i>	<ul style="list-style-type: none">• Do they still drive or have access to transportation?• Do they live alone, with a spouse, family, or care partner?• "Tell me about yourself"	<ul style="list-style-type: none">• Did they seem interested in socializing?• Did they seem able to maintain a conversation?• Did they dominate the conversation?• Did they make inappropriate comments?• Did they tend to center the conversation around politics/religion?

<p>Home Assessment</p> <p><i>A home visit is made in-person by the Program Manager and usually lasts 45 min to 1 hour. This home visit includes the home assessment, survey questions, and the enrollment form.</i></p>	<ul style="list-style-type: none"> • Do they have pets? • Are there minor tasks around the house that a willing volunteer might be able to assist with? <p><i>* If the home is not comfortable or safe for a volunteer visitor, the individual may still be approved for only phone calls, virtual visits, or going on outings with a volunteer.</i></p>	<ul style="list-style-type: none"> • Did the home feel safe and comfortable for a volunteer visitor? • Was their demeanor comfortable to be around? • Did they make inappropriate comments? • Were there items in the home that indicate interests or hobbies to inquire about?
<p>Enrollment Form</p> <p><i>The enrollment form is completed by the Program Manager during the home visit. It is ideal to be familiar with the form so that asking the questions feels more conversational and less formal. For more details, the enrollment form is also available as a PDF through the USAging portal.</i></p>	<ul style="list-style-type: none"> • Do they prefer in-person visits, phone calls or virtual visits? • Have you had any recent falls? • What are some of their hobbies or interests? • What activities would they like to possibly do with a volunteer? • Biographical and demographic questions • Do they have any preferences about their volunteer match? 	<ul style="list-style-type: none"> • Did anything they share, such as details about past experiences or trauma, prompt additional questions? • Were they able to stay on topic? • Did they show any signs of memory issues or cognitive impairment? • Did they show any signs of having difficulty regulating their emotions? • What does their mobility appear to be like and does it seem like they could be safely transported by a volunteer?

<p>Survey</p> <p><i>UCLA and Lubben survey questions are embedded into the enrollment form.</i></p>	<ul style="list-style-type: none"> • UCLA 3-Item Loneliness Scale • Lubben Social Network Scale • Qualitative survey questions 	<ul style="list-style-type: none"> • Did they seem open to talking about their emotions and/or mental wellbeing? • Did they share any thoughts or feelings that might prompt additional questions about volunteer preferences? (Example: learning that they experienced domestic or sexual abuse might prompt additional questions regarding gender preferences)
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