The assessment and review process

Stage 2 Assessment

Telephone Services receive a Stage 1 application form notes. If it is a third part referral, they might call the referrer and discuss the older person’s needs in more detail. Otherwise, they will call the applicant and complete the Stage 2 assessment call.

Telephone Services fill in the Stage 2 Assessment form for Volunteer Visitors they will then email the form to relevant area Wellbeing Project Officer (WPO) and copy in their National Wellbeing Manager (NWM).

This Stage 2 assessment form gathers information about the older person’s current situation around social activities and loneliness/ isolation. It also looks at risk related to any health issues and their accommodation.

They will also clarify the remit of our service, stating what a volunteer can and can’t do:

* Not a dating service
* Not a counselling service
* It’s a wonderful opportunity to chat with someone new
* You’ll receive a visit of up to an hour/ a 30 minute call at a time agreed between yourself and the volunteer

Stage 3 Assessment

Wellbeing Project Officers look at the assessments to identify any red flags and asks Assessing Volunteers (AVs) for availability.

1. Stage 3 Call

Once they have received the stage 2 notes, the available Assessing Volunteer calls the older person to arrange a date and time for a visit and asks additional questions from the ‘Stage 3 Call’.

If the visit is scheduled within 5 working days, the AV gives the ‘Service Boundaries’ during the visit. Otherwise, AV sends out to service user the ‘Meeting confirmation letter’ and the ‘Service Boundaries’ sheet.

When **red flags** have been identified, two people should carry out the Stage 3 assessment visit. These red flags include:

* Aggressive manner
* Multiple people in the property
* Evidence of substance/alcohol use
* Challenging environment
* External location risks
* Type of accommodation
* Access to accommodation

If you think the older person is not suitable for our service or if they are no longer interested, tell your WPO so they can follow this up by sending relevant letters and updating our records.

1. Stage 3 Assessment Visit

The AV calls the older person the day before or just before leaving home for the visit to confirm the appointment.

Once at the visit, the AV makes notes to complete the ‘Stage 3 Assessment Form’. Please remember this is an informal chat and should come across as a friendly conversation.

The Assessing Volunteer:

* encourages the older person to answer all monitoring questions,
* ensures that service boundaries have been fully understood, and
* collects a signature from the Service User after reading out the consent form.

**If applicant is accepted for the service:** the AV can inform the older person that we will be in touch as soon as we find a suitable volunteer. We aim to find a volunteer within 2 months.

**If applicant not suitable**: Do not tell the older person during the visit that they haven’t been successful and follow the guidelines on the Stage 3 assessment form.

**If safeguarding issue:** please tell yourWPO as soon as you can so they can follow the Safeguarding procedure, update Case Notes on ThankQ and complete the Safeguarding Log.

**If the presenting issue concerns care, benefits & income, health, mobility or housing:** Encourage the older person to call the Helpline on 0800 319 6789 for support and advice. In exceptional cases if you feel the older person is not capable of calling themselves, tell your WPO who will then complete the Advice Line Referral Form. You can tell the older person that the Advice Line will attempt to call them twice and if no reply will leave a message.

**After the visit,** AV completes:

* the Stage 3 Assessment Form
* the ‘Risk Assessment and Vulnerability Management Plan’.

and sends them to their WPO as soon as possible, either scanned or photograph via secured email connection following our data protection procedures or by post. All paperwork should be completed and send to the WPO for uploading on our database within 5 working days from the date of Stage 3 visit.

*Please note* that all assessment forms and notes have to be uploaded on our database within the same month in order to produce valid monthly reports.

Risk Assessments

The Risk Assessment and Vulnerability Management Plan is to be completed for all new relationships by the Assessing Volunteer.

**Process for using the Risk Assessment plan for Wellbeing Volunteers is:**

* If risks are identified after the Stage 2 Assessment or Stage 3 call, then a WPO should visit the property with an additional member of staff or volunteer.
* During the Stage 3 visit the WPO/ AV writes notes of potential further risk considerations and adds them to the relevant sections of the Risk Assessment and Vulnerability Management Plan after the visit.

Retention of Older people

Regular catch ups/reviews are made with all matched volunteers and older people in order to ensure they are happy with the service provided, to identify any issues and to offer support. A WPO or AV should undertake the service user review before making a catch up call to a volunteer.

1 month review

This review with the older person is a 5 minutes quick call to ensure the friendship relationship is going smoothly.

The WPO will email the AV any calls that they need to be make that month and by when. The AV then calls the older person on scheduled day. If the older person is not available they leave a voicemail and try calling again later.

The AV fills in the Service User One Month Review form and email/ post it back to their WPO as agreed.

3, 6 month and following biannual reviews

This is the same process as above but completing the follow up review form. It consists of few general questions about the older person as well as the same Monitoring and Evaluation questions that were asked during the initial assessment.

Biannual reviews – older people who have been active and matched for longer than 12 months should complete biannual reviews (every six months) over the phone.

You can use the same Service User follow up review form 3,6, 12.. and email/ post it back to your WPO as agreed.

Please note: If service user is due their review but not currently matched (e.g. awaiting for new volunteer) consider if it’s appropriate to ask monitoring questions or just general questions if older people have been waiting for new match for at least 4 weeks.

Touchpoint Calls for not-matched Older people

Touchpoint calls are made to those services users who have not been matched with a Volunteer Visitor yet. They are a quick call to ensure they are ok and reinforce we are still looking for a volunteer for them.

Your WPO will tell you who is due for a call that month and you can use the Touchpoint call guide to guide you on the conversation. Once done, complete the guide with any information you have discovered on the call and send them back to your WPO as agreed.

WPO

**Sends rejection letter**

**Successful**

**Unsuccessful**

WPO

**Searchs for a Volunteer Visitor**

AV calls WPO to discuss assessment

**AV Stage 3 Assessment**

* Risk Assessment
* Consent form
* Explains service user’s boundaries

WPO receives information and contacts AV

Telephone Services

**Stage 2 - Complete**

AV

**Stage 3 Call**