# Matchmaking in the Voluntary Sector

*Tasks, Workflows, and IT Facilitation*

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WHITE PAPER

# Matchmaking in the Voluntary Sector: Tasks, Workflows, and IT Facilitation

BREAKING NEW GROUND AALBORG UNIVERSITY

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## PREFACE

This white paper is an outcome of Enabling the Matching of Volunteers (EMOVE), a four-year research and development project seeking to develop knowledge and tools that can help voluntary organizations make the right decisions when matching their volunteers. EMOVE was sponsored by Innovation Fund Denmark and carried out by researchers from the Techno-Anthropology Lab (TANTlab) at Aalborg University, the Copenhagen Centre for Health Research in the Humanities (CoRe) at the University of Copenhagen, and Kople ApS, a private developer of software for the voluntary sector.

The white paper is authored by the two university partners of the EMOVE project, with the aims of providing a concise description of matchmaking in the voluntary sector and identifying the opportunities and challenges of supporting matchmaking work by means of IT systems. Therefore, this white paper serves as a guide to voluntary organizations that are currently engaged in matchmaking and are seeking to develop and advance their operations.

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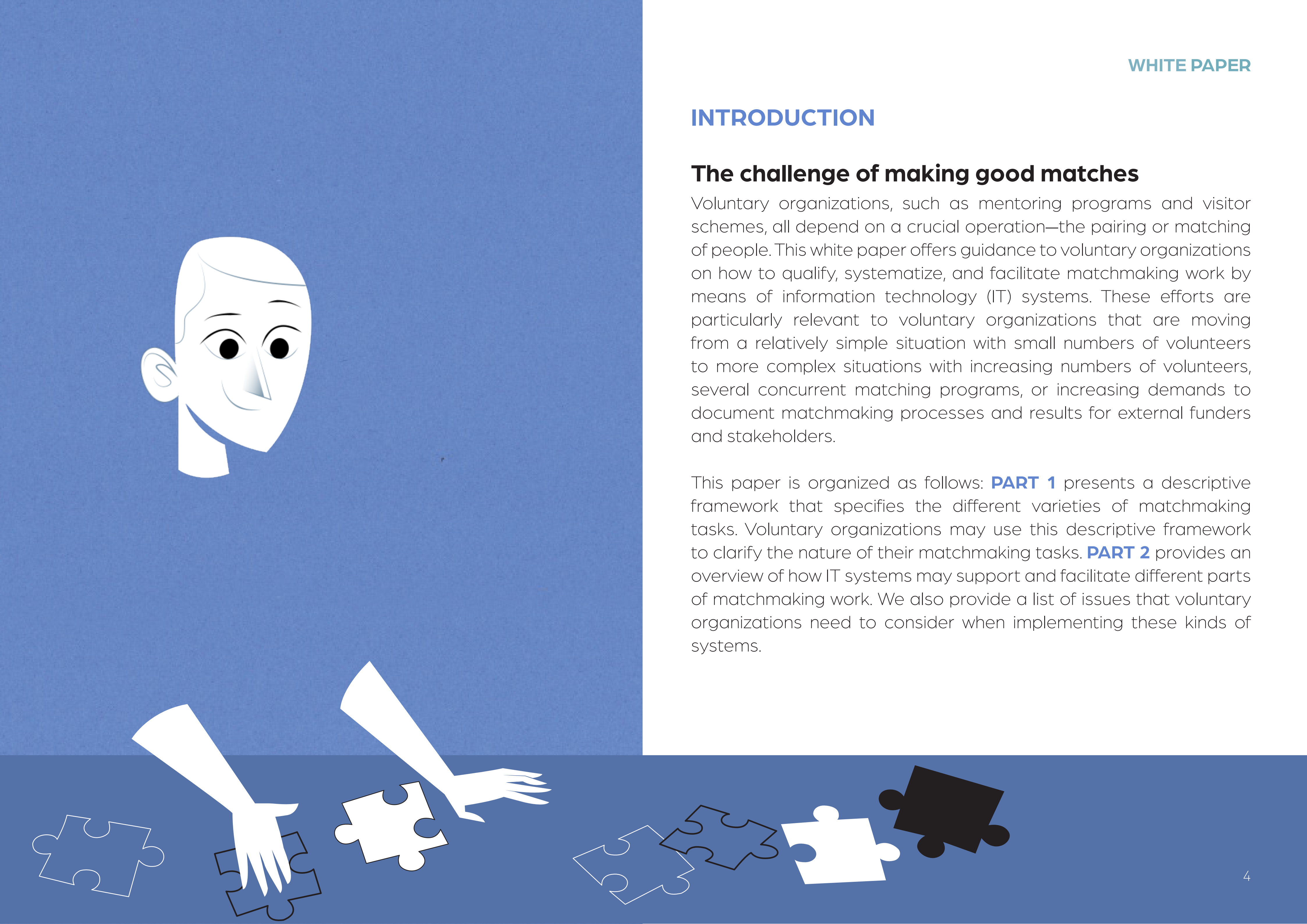


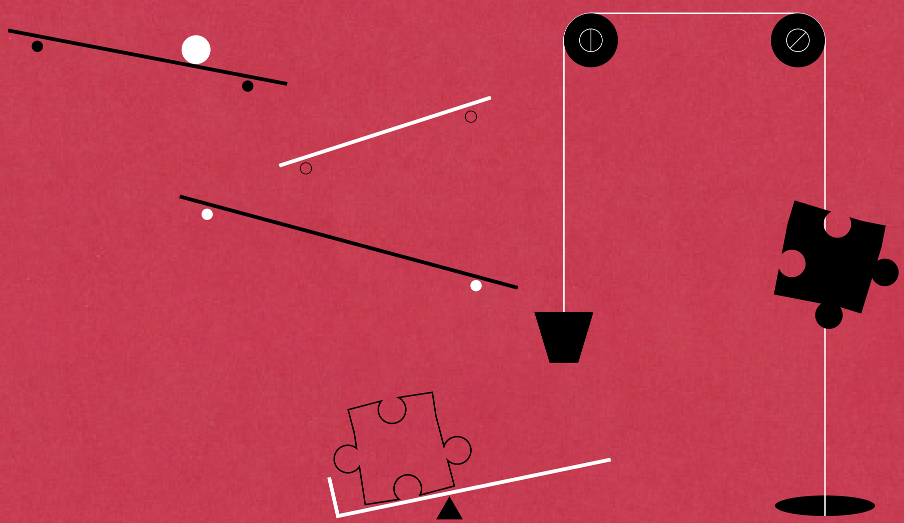
# INTRODUCTION

## The challenge of making good matches

Voluntary organizations, such as mentoring programs and visitor schemes, all depend on a crucial operation—the pairing or matching of people. This white paper offers guidance to voluntary organizations on how to qualify, systematize, and facilitate matchmaking work by means of information technology (IT) systems. These efforts are particularly relevant to voluntary organizations that are moving from a relatively simple situation with small numbers of volunteers to more complex situations with increasing numbers of volunteers, several concurrent matching programs, or increasing demands to document matchmaking processes and results for external funders and stakeholders.

This paper is organized as follows: **PART 1** presents a descriptive framework that specifies the different varieties of matchmaking tasks. Voluntary organizations may use this descriptive framework to clarify the nature of their matchmaking tasks. **PART 2** provides an overview of how IT systems may support and facilitate different parts of matchmaking work. We also provide a list of issues that voluntary organizations need to consider when implementing these kinds of systems.

# PART 1



## A framework for describing matchmaking tasks

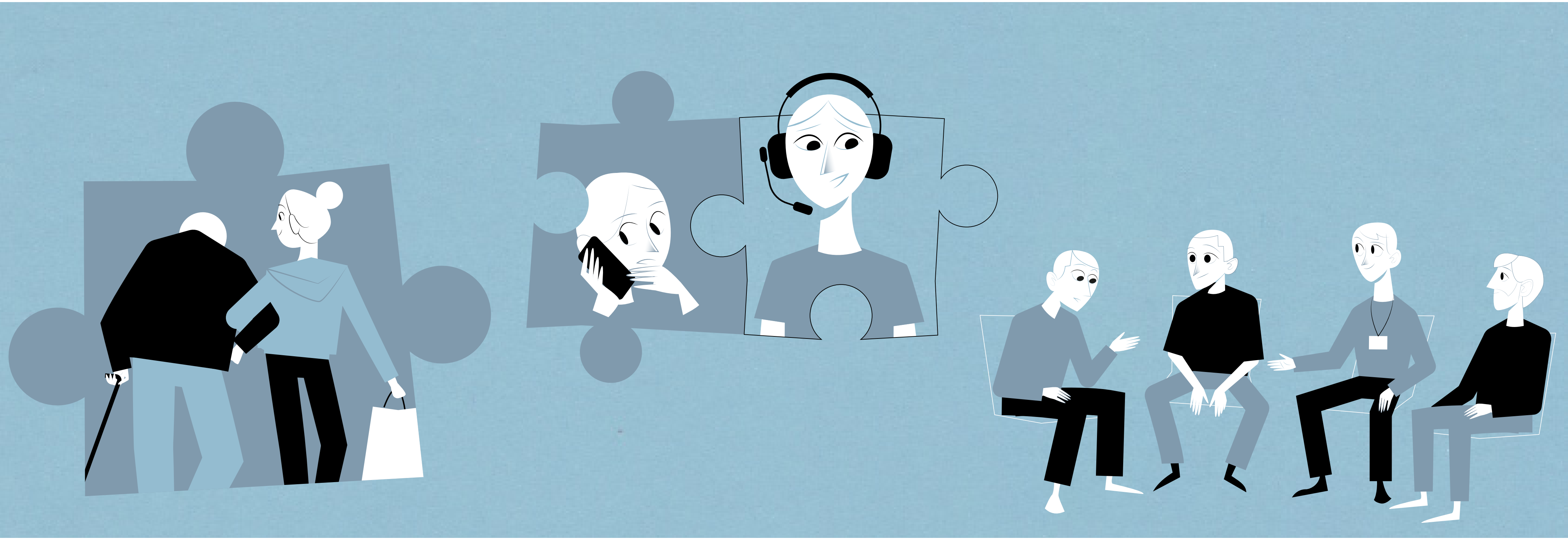
This section presents a broad framework for describing the matchmaking tasks of voluntary organizations based on four key questions:

- Who or what is being matched?
- How is the match prepared?
- What quality criteria apply to the match?
- What follow-up activities are conducted after the match?

In the following section, each of these questions is explained and exemplified in more detail.

## 1.1 Who or what is being matched?

A defining feature of all voluntary matching programs is the entities that are matched. Our review of the field of voluntary work suggests three basic types of matches:



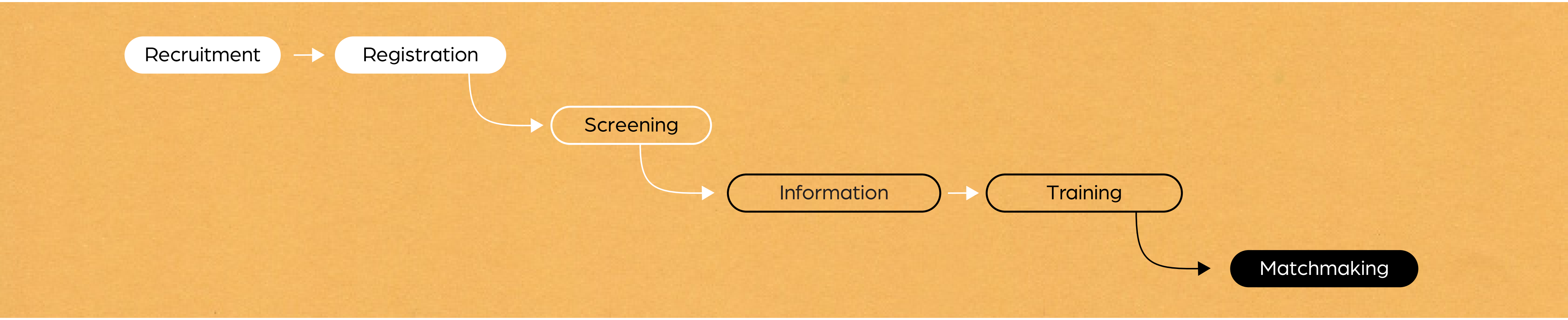
**Person–to–person matches**
Examples include mentoring initiatives, visitor schemes, and companion programs.

**Person–to–task matches**
Examples include allocating volunteers to man crisis hotlines and helplines; to work in soup kitchens, shelters, or crisis centers; and to participate in environmental restoration projects.

**Person–to–group matches**
Examples include group therapy sessions, networking groups, and volunteer disaster response teams.

## 1.2 How is the match prepared?

Matching programs vary considerably with respect to the activities carried out before specific matches are decided. The preparatory activities can be divided into three types:




**Recruitment and registration of potential participants**

Voluntary organizations conduct information campaigns and other public relations activities to inform potential volunteers about their services. When a potential participant contacts the organization, an initial registration is normally conducted.

**Screening**

Most voluntary programs use selection criteria for their participants. In some cases, organizations apply clearly defined criteria, such as whether a person has citizenship, a driver's license, or a clean criminal record. These well-defined criteria may be combined with more qualitative assessments of eligibility; decisions to include or exclude participants may be based on the matchmaker's broad knowledge of how the program normally works and who usually benefits from it.

**Information and training**

Before deciding on an actual match, many voluntary programs prepare their participants by giving them written or verbal information about the purpose and specific activities included in the volunteer work. In some cases, potential volunteers have lengthy conversations with staff from the voluntary organization as part of the preparation. In other cases, systematic training is conducted before a participant is deemed ready to be matched. As part of the contact between the organization and the potential volunteers/receivers of volunteer services, practical circumstances, such as the starting date, location, and amount of volunteer work, may also be agreed upon.

In sum, organizations prepare matchmaking through a series of activities. It is the combination of these preparatory activities that sets the stage for a successful match.

## 1.3 What quality criteria apply to the match?

The *one and only* type of matchmaking known from romantic comedies is generally a misleading metaphor for the type of matchmaking work that takes place in voluntary organizations. Instead, these organizations solve the practical task of continually creating a flow of reasonably good matches given the circumstances, opportunities, and time constraints.

The small or large degree of complexity in matchmaking work can be illustrated by two examples.

The first example is a mentoring program in which several mentors have already signed up and are ready to help. When a new mentee enters the program, it is a relatively simple task for the matchmaker to search through the list of mentors and find the one best suited for the job.

The second example is a visitor scheme pairing language students and (native) older citizens. In this case, a matchmaker may have a handful of language students and a handful of older citizens who need to be matched. The somewhat complicated task for the matchmaker is to decide on several matches at the same time, essentially laying a puzzle that includes all or most of the students and citizens who are waiting to be matched.

As indicated by the two cases, the timing and size of the matchmaking task matter to the complexity of the task. However, even in the simplest case, organizations often consider several simultaneous criteria for a good match. The matching of two people may depend on when they are available, where they live, the matchmaker's perception of what they might have in common, and concerns about what might create conflicts between them.

Some parameters are easily included in the initial registration of potential participants, such as their addresses. However, other parameters may emerge only through the matchmaker's interviews and the preferences that the potential participants may state in these interviews. In the case of a Danish visitor scheme, we have seen matchmakers pay attention to a series of non-standard criteria for a good match, such as having the same sense of humor or having worked in the same line of business.

In general, matchmaking requires considerable attention to practical circumstances and a case-by-case weighing of criteria. For this reason, it is recommended that organizations facilitate peer training, internal knowledge sharing, and dialogue between the people who are doing the matchmaking work. Attempting to fully formalize or automate the matchmaking process and criteria is not advisable.

## 1.4 What follow-up activities are conducted after the match?

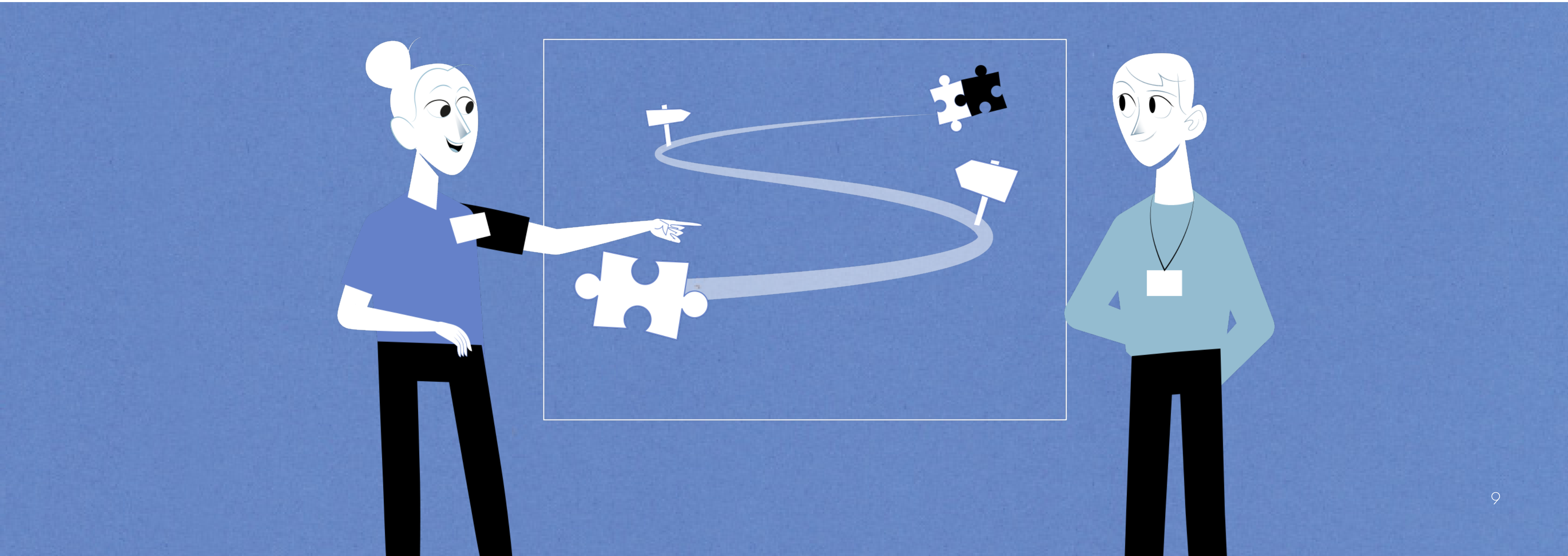
Voluntary organizations do not merely create matches; they also perform a series of follow-up activities.

**Caring for and supporting the individual matches**

Many organizations have procedures for troubleshooting the matches they have created. In some cases, the voluntary organization's staff contact the participants regularly, or the participants are asked to formally evaluate their satisfaction with the program. These contacts are occasions to motivate the participants, communicate norms and codes of conduct, negotiate conflicts, and sometimes break up matches and create new ones.

**Documenting and improving the matchmaking program**

Organizations often engage in some kind of evaluation, monitoring, or documentation of their activities. For instance, they may gather statistics on the number and durability of matches, or they may attempt to assess the effects of various measures, such as a preparatory course or regular check-up calls. The documentation of the organization's activities is often used internally to understand and improve the program, and externally to communicate with sponsors and other external stakeholders.



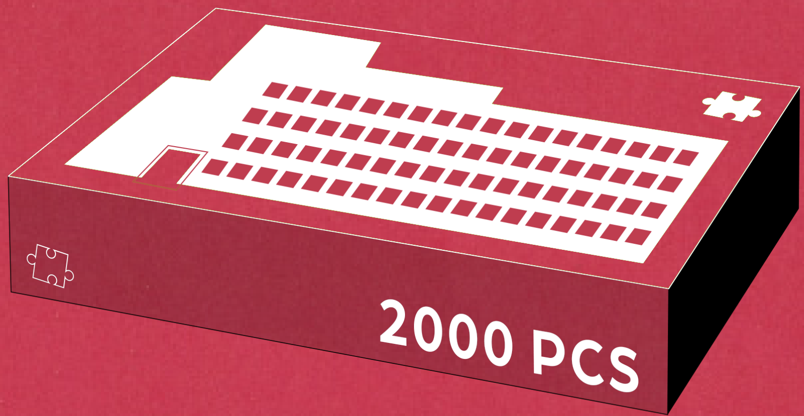
## 1.5 Framework for describing the matchmaking work of an organization

The various aspects of the matchmaking process outlined in Sections 1.1–1.4 can be summarized in the framework below. Organizations may use this framework to generate quick and concise descriptions of the key features of their matchmaking work.

| Description of the matchmaking work | Name of the organization: |
|---|---|
| Who or what is being matched? | ( ) person to person<br>( ) person to task<br>( ) person to group |
| How is the match prepared? | Recruitment and registration activities:<br>Screening criteria:<br>Information and training activities: |
| What quality criteria apply to the match? | Standard quality criteria:<br>Examples of ad hoc quality criteria: |
| What follow-up activities are conducted after the match? | Activities that care for or troubleshoot individual matches:<br><br>Activities that evaluate and improve the matchmaking program: |

Table 1: A framework for describing matchmaking work

# PART 2




## IT support and facilitation of matchmaking work

When voluntary organizations move from a relatively simple situation with small numbers of volunteers to more complex situations (see the Introduction), they may benefit from organizing the matchmaking work around an IT system. This is because several parts of the matchmaking process may improve from the formalization and systematization that the IT system offers, even as other parts may rely more on ad hoc criteria and a human touch.

In Section 2.1, we identify the parts of the matchmaking process that are likely to benefit from IT support. Following this, in Section 2.2., we describe some of the challenges and concerns that voluntary organizations must focus on if they choose to move toward an increasingly IT-supported matchmaking process. The description of these challenges is based on the EMOVE project, in which we conducted ethnographic studies of four organizations that recently implemented a software system to support their matchmaking work.

## 2.1 How matchmaking can benefit from the support of an IT system

In this section, we describe how an IT system may ideally support matchmaking work. When using the term "IT system," we assume a system akin to a customer relationship management system or an IT system developed to support all phases of matchmaking. These kinds of systems are more comprehensive forms of IT support than, for example, a spreadsheet shared between a group of matchmakers. As a minimum, an IT system of this kind has the following features:

**Searchable database:**
The system builds on a database with files for all participants in the matchmaking program, and it makes this information available through a variety of search functions.

**Administration of access rights:**
The system allows managers to grant selective access rights to the people conducting the matchmaking, thus taking privacy and General Data Protection Regulation (GDPR) issues into consideration.

**Integrated communication:**
The system allows matchmakers to integrate several streams of information, such as emails, telephone calls, and text messages. In this way, the system attempts to incorporate as much information as possible and discourage the use of multiple parallel systems.

**Process structuring:**
The system allows managers to define prescribed workflows, for instance, by setting up mandatory steps that must be taken before proceeding to the next stage.

**Process documentation:**
The system keeps track of communication, decisions, and actions related to specific cases or participants in the program.

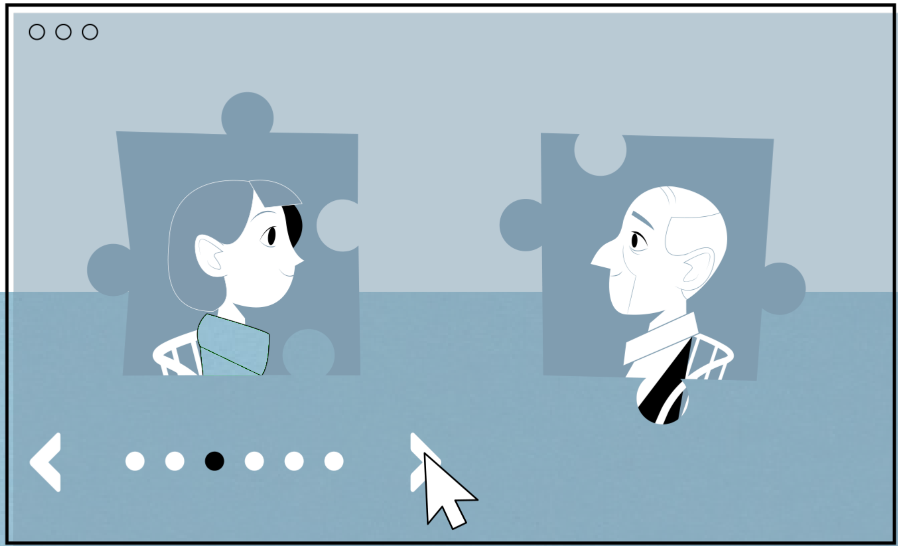


Table 2 outlines how an IT system may support or facilitate specific parts of a matchmaking process.
Table 2 builds on the descriptive framework from **PART 1**.

Table 2: Features of matchmaking work that are appropriate for IT system support

| Key questions when describing matchmaking work | | Possible support by an IT system |
|---|---|---|
| How is the match prepared? | Recruitment and registration activities:<br>Screening criteria:<br>Information and training activities: | Process structuring: The system may be set up to require documentation for the screening criteria before proceeding to the next stage. |
| What quality criteria apply to the match? | Standard quality criteria:<br><br>Examples of ad hoc quality criteria: | Process structuring: The system may be set up to remind matchmakers of open (non-matched) cases.<br><br>Searchable database: The system may provide search functions to assist with the matchmaker's overview of the potential candidates for a match.<br><br>Searchable database: The system may provide matchmakers with full information on the particular candidates for a match, including free text notes from other matchmakers who have communicated with the candidate. |
| What follow-up activities are conducted after the match? | Activities that care for or troubleshoot individual matches:<br><br>Activities that evaluate and improve the matchmaking program: | Process structuring: The system may remind matchmakers to follow up on matches after a given period.<br><br>Searchable database: The system may gather accumulated information on the matchmaking work, such as the number and duration of matches and the correlation between specific features. Based on this, the system may provide basic data for exploring or reporting on the organization's matchmaking program. |

## 2.2 Challenges and concerns when implementing an IT system to support matchmaking

Voluntary organizations differ significantly not only with respect to the nature of the matchmaking task they are solving but also with respect to how they practically organize matchmaking. In some organizations, matchmaking is carried out in one location by permanently employed full-time staff. Other organizations work at scattered locations, with a high turnover of people who are volunteers themselves. The diversity of organizational circumstances means that the implementation of an IT system is likely to follow different trajectories and that different resources are available to overcome the challenges that will invariably arise. Universal solutions do not exist. However, based on our ethnographic studies of four organizations, we have identified a series of recurrent issues that many, if not all, organizations have had to cope with in order to arrive at a reasonably well-functioning integration of people, workflows, and IT systems. In the following, we describe these issues in detail. Our hope is that the list of issues can inspire organizations to overview and reflect on the different aspects of their onboarding and implementation processes.

**Technical preparation and configuration of the system**
Transitioning to a new system requires several forms of preparation. One major task is to transfer the organization's current database into the format of the new system. A second major task is to set up the workflow of the new system and make decisions regarding its various opportunities for customization.

**Bringing tacit knowledge and well-established practices into a new format**
Organizations that implement a new comprehensive IT system to support matchmaking are usually already doing matchmaking through other means. The members of such organizations often have an elaborate understanding of the types of people participating in the program, as well as the range of standard and ad hoc quality criteria that may apply to the creation and troubleshooting of matches. Thus, investing time and effort in articulating previous practices and clarifying their relations to the new system is crucial to ensure the successful implementation of an IT system. In some cases, previously used criteria may be formalized as mandatory steps in the workflow organized by the IT system. In other cases, organizations may support the functioning of the IT system by setting up internal rules for how to use it. In an organization running a visitor scheme, the matchmakers may, for instance, agree among themselves that they will use a free text field in the system to always note anything that strikes them as peculiar about the participants' homes. Finally, in some cases, the implementation of a new IT system may be an opportunity to revise and improve previous practices.

**Learning to operate the system**

Organizations that have transitioned to an IT-supported matchmaking process have found it necessary to learn several new things at once. Beginning at the managerial level, learning how to set up new projects within the system is necessary. Each project may involve special workflow steps, quality criteria, and configuration of access rights. In other words, managers must learn how to define their new projects in terms of the system parameters.

The matchmakers—the people who create and follow up on the matches—must learn to operate the system and its features as part of their daily work. They must also learn what the system looks and feels like for the people who are participating in the matching program. For matchmakers, the amount of initial learning is sometimes experienced as quite significant. In general, it is easier to overcome the initial learning requirements in organizations with full-time matchmakers who use the system often and who work in close contact with their colleagues. More difficulties are experienced when matchmakers use the system intermittently and work alone.

Finally, the participants in matchmaking programs will often experience the transition to a new system as a change. Certain messages and procedures may look different and can, in some cases, require adjustment.

**Data management and legal considerations**

Many voluntary organizations are uncertain whether their established practices are living up to the new GDPR requirements. Transitioning to a new system does not in itself guarantee that all requirements will be met. However, the implementation of a new system is an opportunity to improve the data practices of the organization. This includes efforts to clean up or delete data in order to comply with the GDPR's data minimization principle.

**Documentation and accountability**

Voluntary organizations are often crucially dependent on economic support from external stakeholders. For this reason, an important part of implementing an IT system is to ensure that it delivers data that support the organization's need to document the work that it does. Securing these data can be a matter of making organizational rules for what data are entered into the system. It can be a simple matter of using the in-built reporting functions of the system, or it can be a question of developing analyses based on data exported from the system. In either case, using the opportunities for IT-supported documentation of the matchmaking work may be a significant contribution to the ability of the organization to gather necessary support from its stakeholders and funders.

# ABOUT EMOVE AND ITS UNIVERSITY PARTNERS

### Enabling the Matching of Volunteers

**(EMOVE)** (2021–2024) is a research and development project that aims to develop knowledge and tools that will help voluntary organizations make the right decisions when matching their volunteers. The project was sponsored by Innovation Fund Denmark and carried out by researchers from the Techno-Anthropology Lab (TANTlab), the Copenhagen Centre for Health Research in the Humanities (CoRe), and Kople ApS, a private developer of software for the voluntary sector.

Homepage: www.emove.ku.dk

### The Copenhagen Centre for Health Research in the Humanities

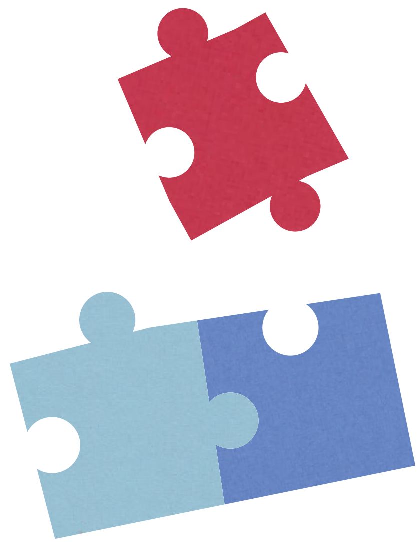
**(CoRe**) at the University of Copenhagen investigates the cultural, social, and historical dimensions of health and aging. The center is involved in cross-disciplinary research and innovation projects and collaborates with partners from all areas of society. CoRe focuses on health and aging processes in the welfare society and on lifestyle, mental health, and quality of life.

Homepage: www.core.ku.dk

### The Techno-Anthropology Lab

**(TANTlab)** is a research group at the Department of Culture and Learning at Aalborg University in Copenhagen. The research group investigates key processes of social and technical innovation that are critical to the challenges facing contemporary and future societies. The group focuses on how users and citizens may become actively engaged in the design and development of new technologies.

Homepage: www.tantlab.aau.dk



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