VolunTrek

Co-funded by the European Union

Module 3: Volunteer Selection and Matching

Module 3: Volunteer Selection and Matching

What will you achieve in this module?

This module will help your organisation connect each selected volunteer with a suitable role, team, environment and level of support.

By the end of the module, you will be able to:

- confirm what a role genuinely requires;
- understand a volunteer's motivations, strengths, availability and support needs;
- compare the role and volunteer profile using transparent criteria;
- involve the volunteer in deciding whether the match is appropriate;
- agree on training, supervision and reasonable adaptations;
- document the match without recording unnecessary personal information;
- review and adjust the match after volunteering begins.

At a glance!	
Estimated reading time	25 – 35 minutes
Main outputs	Volunteer profile, role comparison, agreed match, support arrangements and review plan

At a glance!	
Essential actions	Listen to the volunteer, use role-related criteria, agree on support and review the match

Why matching matters

Matching usually begins after recruitment and an initial suitability check. It is the collaborative process of connecting a volunteer with a role that responds to the organisation's needs and fits the volunteer's:

- motivations and interests;
- strengths and relevant experience;
- learning goals;
- realistic availability;
- preferred ways of working;
- access and support needs.

A good match promotes meaningful participation, inclusion, learning, role clarity and continuity. It also protects beneficiaries, volunteers and staff by ensuring that responsibilities are appropriate, boundaries are understood and the necessary support is available.

A weak match may lead to frustration, overload, unsafe practices, conflict or early departure.

Matching is not a permanent judgement about a person. It is an informed, two-way agreement that should be reviewed as the role, needs or circumstances change.

How matching differs from selection

Selection establishes whether a candidate is suitable for volunteering or for a particular type of role. Matching then explores which specific role, team, setting and support arrangements offer the best fit.

Do not use matching to rank people according to vague impressions or decide who is the "best volunteer". Use transparent, role-related and non-discriminatory criteria to find a suitable arrangement.

Build a suitable match

Follow these seven steps with the volunteer.

Step 1 – Confirm the role

Start with an approved, up-to-date role description. Confirm:

- the role's purpose and expected contribution;
- tasks and boundaries;
- essential and desirable requirements;
- location, format, schedule and duration;
- physical, social and emotional demands;
- potential risks and safeguarding requirements;
- supervision and communication arrangements;
- possible adaptations;
- relevant cultural, linguistic or community-specific knowledge.

If the role is unclear or no longer reflects the organisation's needs, return to **Module 1: Organisational Needs Assessment**(link) and **Module 2: Volunteer Recruitment**(link) before continuing.

Step 2 – Understand the volunteer

Use an accessible form or conversation to explore:

- motivation and interests;
- strengths, experience and transferable skills;
- learning or development goals;
- realistic availability;
- preferred tasks and ways of working;
- communication preferences;
- practical barriers or adaptations the person wishes to discuss;
- the kind of guidance and feedback that may be helpful.

Ask only for information that is relevant to the role. Give the volunteer a choice about how to share it, for example through a written form, conversation, easy-to-read document or supported process.

If the role involves working closely with a particular cultural or linguistic community, explore the volunteer's relevant experience, confidence and learning needs. Do not assume that intercultural competence is required for every role, and do not treat a shared background or language as a substitute for training and support.

Step 3 – Compare the role and volunteer profile

Compare the information systematically and distinguish between:

- **essential requirements:** needed before the role can begin safely;
- **learnable competences:** can be developed through training, mentoring or experience;
- **preferences:** useful but not mandatory;

- **support needs:** can be addressed through supervision or reasonable adaptations.

Use only role-relevant information. Do not interpret age, disability, culture, religion, language, education or personal background as evidence of ability or suitability.

Treat intercultural competence like any other competence: determine whether it is essential for this role or can be developed through preparation, training or mentoring.

Use: *Volunteer-Function Correspondence Table*. (link)

Step 4 – Discuss the proposed match

Explain why the role may be suitable and describe the conditions honestly. Invite the volunteer to:

- ask questions;
- express concerns;
- disagree with the proposed match;
- suggest another role or arrangement;
- explain what support would help.

If the work involves a community or environment unfamiliar to the volunteer, discuss this directly. Explain the context without stereotyping the community, and agree on any briefing, training or mentoring required.

Matching must be a two-way decision. A volunteer should not feel pressured to accept a role simply because the organisation needs help.

Step 5 – Agree on support and adaptations

Before confirming the match, agree on:

- induction and role-specific training;
- the named supervisor or contact person;

- how and how often communication will take place;
- reasonable adaptations or accommodations;
- equipment, transport or technical support;
- safeguarding and data-access arrangements;
- how the volunteer can raise concerns;
- the date of the first review.

A strong task fit does not remove the need for ongoing support.

Step 6 – Record the agreement

Document:

- the agreed role and start date;
- the main reasons for the match;
- confirmed training, support and adaptations;
- any action required before the volunteer begins;
- the responsible staff member;
- the date and method of review;
- the next step, usually onboarding.

Record only what is necessary. Avoid subjective labels, assumptions and sensitive personal details that the organisation does not need.

Step 7 – Review and adjust the match

Review the match after the first few weeks, at agreed intervals and whenever:

- tasks or responsibilities change;
- the volunteer's availability changes;

- support or accessibility needs emerge;
- the team or working environment changes;
- cultural or communication misunderstandings occur;
- the volunteer, supervisor or beneficiary raises a concern.

The review may confirm the match, lead to adaptations, identify a different role or support a responsible ending. Volunteers must have an accessible way to request a review without negative consequences.

Use: *Questionnaire for Review and Adaptation of the Volunteer Role*. (link)

Make matching inclusive and accessible

Inclusive matching focuses on strengths, interests and relevant information—not assumptions about identity or background.

Provide different ways to participate

- Offer written, oral, supported and easy-to-read options.
- Explain questions and technical terms clearly.
- Allow enough time for the volunteer to understand and respond.
- Provide interpretation or communication support where possible.
- Make it clear that discussing an adaptation will not automatically disadvantage the person.

Check practical access before agreeing on the role

Consider:

- transport and physical access;

- digital devices, connectivity and platform accessibility;
- language and communication;
- scheduling and caring responsibilities;
- sensory or emotional demands;
- supervision and opportunities to ask for help.

Keep essential safety and safeguarding requirements, but explore whether tasks, training, schedules, environments or support can be adapted.

Create space for intercultural learning

Provide respectful opportunities for volunteers, staff and community members from different backgrounds to share experiences and perspectives. Where a role involves close contact with a particular cultural or linguistic community:

- explain relevant context and expectations;
- avoid presenting any community as uniform;
- provide a briefing or peer/cultural mentor where useful;
- encourage questions without judgement;
- create a clear route for addressing misunderstandings.

The responsibility for adaptation should not fall entirely on the volunteer or community.

Adapt the match to the volunteering format

What to consider when matching across different volunteering formats:

Format	What to consider	Support to agree on	Main risks to address
Face-to-face	Location, mobility, transport, schedule, interpersonal demands,	Site orientation, accessible workspace, named on-site support	Physical barriers, emotional demands,

Format	What to consider	Support to agree on	Main risks to address
	beneficiary contact and community context	and safeguarding procedures	unclear boundaries or insufficient support
Online	Task clarity, autonomy, digital skills, equipment, connectivity, time zones, cultural or religious calendars and data access	Secure tools, technical guidance, scheduled contact and inclusion in the wider team	Isolation, insecure data handling, unclear communication or insufficient supervision
Hybrid	Ability to participate across both formats and receive consistent information	Clear calendar, equal access to meetings and coordinated supervision	Unequal visibility, duplicated communication or inconsistent support

Online volunteering is not automatically accessible. Confirm that the volunteer can use the required tools and participate without carrying unreasonable equipment, connectivity or accessibility costs.

Adapt the match to the duration

Type	Matching priorities
Short-term or one-off	Define tasks precisely, prioritise competences that can be used immediately and confirm availability for the specific period. Provide proportionate preparation and support so the volunteer can contribute meaningfully from the start.
Long-term	Consider sustained motivation, relationship-building, learning opportunities and whether the role can remain appropriate over time. Plan regular reviews, adaptations and continued support.

For both types, ensure that the role is meaningful and the expectations are realistic. A shorter commitment does not justify unclear boundaries or inadequate safeguarding.

Do's and Don'ts

Do	Don´t
Use transparent, role-related criteria.	Rank people using vague personality impressions.
Involve the volunteer in the final decision.	Assign a role without discussing its conditions.
Separate essential requirements from learnable skills.	Exclude people because of assumptions or unnecessary criteria.
Agree on training, supervision and adaptations.	Assume that a good task fit removes the need for support.
Discuss cultural or community context where relevant.	Assume that goodwill or a shared background guarantees intercultural competence.
Set a review date before onboarding begins.	Treat the initial match as permanent.
Explain how a volunteer can request a change.	Make volunteers fear negative consequences for raising concerns.
Record only necessary and objective information.	Store subjective or sensitive details that are not needed.

Good practices

- Apply the same core matching criteria to all candidates while adapting communication and participation methods.
- Use a structured conversation rather than relying on intuition.

- Explain how and when the match will be reviewed.
- Set the first review date before onboarding.
- Offer role-specific cultural or community preparation where relevant.
- Agree on more than one way for the volunteer to ask questions or raise concerns.
- Use trial or observation opportunities only when they are clearly defined, supported and do not replace paid work.
- Review role descriptions regularly so that matching is based on current information.

Useful additions

The following can strengthen matching but are not essential:

- a regularly updated role database;
- a record of skills and interests that the volunteer can review and update;
- peer or buddy support;
- short matching-review surveys;
- concise community-context notes covering relevant language, expectations and contacts;
- an optional introductory visit or meeting with the team;
- a simple visual summary of agreed support and review arrangements.

Examples in practice

Matching involves more than the task

Situation: Lucas wanted to help reduce loneliness among older adults. He was assigned regular home visits and accompaniment tasks.

Challenge: The initial conversation did not explore his facilitation experience, preferred level of activity or communication needs. He became disengaged and did not feel comfortable raising concerns through the only available feedback channel.

What could change: The organisation could use a structured profile conversation, offer several ways to provide feedback and consider a mixed role that combines individual contact with group activity facilitation. An early review would allow Lucas and the coordinator to adjust the arrangement before disengagement increases.

Learning point: A suitable match includes the task, environment, relationships, communication, accessibility and support.

Tools and templates

Tool	Purpose	Who uses it?	When?
Volunteer-Function Correspondence Table	Compare role requirements with volunteer information transparently	Coordinator and volunteer	During matching
Questionnaire for Review and Adaptation of the Volunteer Role	Review whether the match remains appropriate and agree on changes	Coordinator and volunteer	After the first few weeks, at agreed intervals or whenever circumstances change

Using AI in this module

AI may help organise anonymised, role-related information or create a comparison table. It must not rank candidates, calculate suitability scores, infer personality or make the final match.

Before using AI, follow **Module 0: Using AI responsibly** and your organisation's data-protection and AI policies.

Appropriate uses

AI can help you:

- organise stated role requirements and volunteer preferences;
- separate essential, learnable and desirable competences;
- identify missing information that should be discussed;
- prepare a neutral comparison table;
- simplify matching questions or information;
- draft a review agenda using anonymised information.

Important limits

- Use only public, fictional or properly anonymised information.
- Do not enter identifiable volunteer profiles or sensitive information into publicly available tools.
- Ask AI to organise information, not to evaluate the person.
- Do not ask AI to rank candidates, score compatibility or recommend the final match.
- Review every output for bias, missing context, inaccuracies and false assumptions.
- Keep the conversation and final decision under human responsibility.

Example prompt

"Using only the anonymised, role-related information below, organise the stated requirements, volunteer preferences, possible barriers, missing information and support options in a comparison table. Separate essential requirements from learnable skills and

preferences. Do not rank people, calculate compatibility scores or recommend a final decision."

Reflection questions

- Are we considering motivation, strengths, availability, environment and support—not only skills?
- Are our criteria necessary, transparent and non-discriminatory?
- Has the volunteer participated freely in the decision?
- Have we distinguished essential requirements from learnable competences?
- Are training, adaptations and review arrangements clearly recorded?
- Can the volunteer request a change without negative consequences?
- Does the role require cultural or linguistic knowledge? If so, what preparation or support have we agreed on?
- Are we recording only information that is relevant and necessary?

Key takeaways

After completing this module, your organisation should be able to:

- treat matching as a shared agreement rather than a permanent judgement;
- consider the role, environment, relationships, accessibility and support;
- compare the volunteer and role using transparent criteria;
- support intercultural competence where it is relevant instead of assuming or using it as an unnecessary barrier;
- agree on training, supervision and adaptations before the role begins;
- document the match responsibly;
- review and adapt the arrangement after volunteering starts;
- use AI only to organise anonymised information, never to evaluate or decide.

Before moving to Module 4: Confirm that the volunteer understands and accepts the role, that agreed support and adaptations are recorded and that a first review date has been set. Then continue to **Module 4: Volunteer Onboarding**.

References and further reading

Centre for European Volunteering. (2019). *Inclusive volunteering toolkit*. https://df2253af-c034-4026-aac2-5d1c91f60490.filesusr.com/ugd/3ec99c_38b45efe3d4c42a98e8e994da6ba4068.pdf

Martínez Villanueva, G. (2026). *La gestión del voluntariado desde la perspectiva de las organizaciones sin fines de lucro y las personas voluntarias: El impacto en la permanencia y abandono* [Doctoral dissertation, Universitat Politècnica de València]. RiuNet. https://riunet.upv.es/entities/publication/bcc19b37-411f-4d02-85a9-fa53f58653ef

National Council for Voluntary Organisations. (n.d.). *Keeping volunteers*. https://www.ncvo.org.uk/help-and-guidance/involving-volunteers/supporting-and-managing-volunteers/keeping-volunteers/

National Council for Voluntary Organisations. (2025, January 30). *Making volunteering more inclusive for disabled people*. https://www.ncvo.org.uk/help-and-guidance/involving-volunteers/making-volunteering-more-inclusive/

Red Acoge. (n.d.). *Guía de gestión de voluntariado*. https://redacoge.org/wp-content/uploads/2020/11/Voluntariado.pdf