



SETTING UP A HELPLINE



Helplines
Partnership



Setting up a helpline is complicated. Helplines Partnership (HLP) has created this guide to help those considering setting up any type of multi-channel support. With over 25 years of knowledge and expertise in the sector HLP is able to support the development of your service from the outset.

IDENTIFY & ESTABLISH NEED

- Establish if there is a genuine need for your service.
- What other organisations already support this type of need (locally & nationally)?
- Are there opportunities for partnership working to avoid duplication & make the best use of resources?
- Research the demographics of service users and estimate demand.
- Define the reach of your service taking into account factors such as: geographical area, age, gender and topic.
- How & when do you think service users will want to access your service?
- What is the likelihood of your service being viable and sustainable?

PURPOSE & SERVICE REMIT

- Define objectives for the service in relation to your mission; keep these constantly under review to ensure you continue to meet developing needs.
- Clearly define the remit of your service. Will your helpline be providing advice, a listening ear, signposting or something different?
- Policies, procedures, aims and objectives should be documented. When appropriate (e.g. how you respond to feedback) these should be available in the public domain.
- Service limitations - identify services you can signpost service users to if their needs go beyond the remit of your service. Seek to establish links with other services.
- Access - how will service users contact you? Consider various methods such as email, SMS, webchat and forums.
- Complaints and concerns - clearly written procedures about how your service will deal with complaints is necessary to enable consistent and effective action by call handlers.
- Basis of support - define the boundaries within which your service will operate to ensure a consistent approach such as: the information you will provide, any restrictions regarding contact duration, if/when your service may break confidentiality if there are safeguarding concerns.
- Personnel - what staffing structure and roles does your service require? You will need to think about: operational, frontline, supervisors, management, marketing, funding, IT, administrative, trustees etc.



PLANNING YOUR SERVICE

- Are there likeminded individuals / organisations with whom you can engage to explore and develop your service?
- How will your service be **funded** from set-up and be sustainable in the long term?
- What resources are needed i.e. financial, staffing, equipment, premises etc?
- How will support functions be provided: HR, insurance, legal & financial services, **training**, professional memberships, supervision, utilities, **telephony** and **IT**?
- Draft a business plan to include: mission, objectives, strategy, budget, policies and structure.

RECRUITMENT & STAFFING

- Call handlers can be: paid members of staff or volunteers; full, part-time or sessional; in-house or outsourced, home or office based.
- What skills, experience and qualifications are required for call handling? Training provision should ideally be a mixture of both in-house and external.
- **Safeguarding** - ensure all call handlers are confident and aware of procedures for when they come into contact with vulnerable service users.
- **Support mechanisms** - Who will manage, co-ordinate and support call handlers? Without appropriate support you will not be able to provide an effective quality service.
- Will there be sufficient staffing levels during peak times? How will absences and turnover be managed?
- Consider: It is better to offer an effective, well resourced helpline for a few hours a week than a poor quality service for longer periods with overworked call handlers.
- For mutual support and to minimise **stress on call handlers** there should always be two people to answer enquiries.
- Shifts: Call handlers will require time away from the line. Breaks should be planned, and abide by employment law and health and safety recommendations.

TECHNOLOGY

- Ensure your systems are adequate to operate your service effectively. Continuous technological advances offer ingenious ways to respond, manage, record and review contacts with your service.
- **Outcome measurement** is important for reviewing, developing and funding helplines. An effective **contact logging tool** helps capture, record and analyse your service information.
- **Website** - your service will require an online presence. This will provide further traffic to your helpline. It can also provide a way for users to contact you through online resources such as forums, online messaging & email enquiry forms.



TELEPHONY

- What are your overall telephony requirements? Do you need physical phone equipment or would a virtual call system be better suited to your needs? How many lines are required? It is best practice to operate a separate administrative line to avoid receptionists answering sensitive calls.
- What type of telephone number will you offer? Would you like to offer a freephone number or do you expect callers to pay their telephone costs? Do you expect to receive calls from payphones which can be expensive on certain number ranges? Waiting times for service users should be kept to a minimum, especially if you don't operate a **freephone line**. You will need to consider the cost implications for all concerned.
- How will you route calls to helpline workers? Will there be a need to play callers messages, transfer between helpline workers and / or record calls? What systems are in place to cover peak periods?
- Service users expect confidential, affordable and accessible ways to contact your service. HLP has a number of partnerships with ethical telephone providers offering cost-effective solutions:

**Virtual Call Centre | Special Freephone Tariff | Payphone Access Charge
Discounted Telephony | Telephone Interpreting**

MARKETING

- You will need materials that represent your service. Getting the views of a range of stakeholders including service users can be helpful.
- Develop an effective marketing strategy consistent with the intelligence garnered from users and potential users of the service. Where would they look to find details about the help you offer? (e.g. online, social media, GP surgeries, libraries, other agencies etc.).
- Advertising your service is likely to increase call volumes, therefore systems must be in place to deal with any potential influx. You must ensure you have the capacity to cope with the demand created through marketing. If this is the responsibility of another person or department, make sure they keep the helpline informed about any new activities.
- Consider using **social media** to promote your activities and as a source of support. Ensure you have the skills and resources to manage them effectively.
- Invest time on media relations, write relevant press releases, look for opportunities to gain coverage in local and national publications and also in community guides / directories if appropriate. Can you submit podcasts or conduct an interview with a local radio station?
- Evaluate and continually improve the effectiveness of your marketing strategy.



MONITORING & EVALUATING

- What data do you want to capture and why? i.e. performance monitoring, resource management, service user intelligence etc.
- Use a **data management tool** to set up the parameters you want to measure and maintain the recording to establish trend data. This is a critical component to evaluating your service and provides evidence for future funding bids.
- Feedback from service users can provide useful insights: identifying gaps in service provision, areas for development, need for training or research, marketing and promoting your helpline.

This document can help you to think about what you need to have in place to start a helpline service. Contact us for more information on how Helplines Partnership can support start-up services.



PUBLICATIONS FROM HELPLINES PARTNERSHIP



Safeguarding and Helplines



Working with Social Media



Who Helps Helpline Workers?



Responding to Challenging Calls



Contact Logging: Vital for Helplines



Good Practice Guidelines



Information Management



Affordable Call Costs for UK Helplines



Helplines and Number Ranges Guidance



Building Websites for Charities



Measuring Outcomes for Helplines



Helplines Standard Brochure



SERVICES FROM HELPLINES PARTNERSHIP



Membership



Contact Logging Tool



Training for call handlers & managers



Special Freephone Tariff



Helplines Standard



Virtual Call Centre



Start-Up Package



Translation



Tailored Support



Telecommunication Solutions



Website Portals



Payphone Access Charge



HELPLINES STANDARD

Using the **Helplines Standard** to build a service ensures high quality provision from the start. Includes a self-assessment tool which can be used to assist in planning. Strong foundations based on the quality standard makes the assessment process easier.