



Helplines STANDARD

BROCHURE

Nationally recognised quality standard defining and accrediting best practice in helpline delivery

Helplines Partnership (HLP) is the membership body for organisations that provide helpline services in the UK and internationally.

HLP facilitates high quality helpline provision for callers by offering services to helpline providers. These include training, Helplines Standard accreditation, individually tailored support and access to the Helpline Freephone Range, a dedicated range of free to caller telephone numbers exclusively for helplines.

Helplines Partnership raises the profile of the sector by representing its members' interests and influencing the social policy agenda. HLP gives providers of helpline services a voice to help them build sustainability and promote excellence, choice and accessibility for everyone.

HELPLINES PARTNERSHIP

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Introduction

Helplines Partnership (HLP) is the membership body for organisations that provide helpline services in the UK and internationally.

The Helplines Standard defines and accredits helpline practice. This quality framework is an excellent way of ensuring your helpline is effectively meeting the needs of service users. Accreditation is valued by many funders and is a great motivator for your helpline team.

The Helplines Standard recognises that the world of helplines is incredibly diverse and encompasses:

- Voluntary, statutory and commercial service providers
- Local, regional, national and international operations
- Paid staff and volunteers
- Multi-channel communications such as phone, SMS, email, live webchat, and social media

The Helplines Standard recognises and accommodates this diversity. It also emphasises the importance of strategic planning and partnerships which are essential for the sustainability of helplines.

The first version of the Helplines Standard was launched in 2000 by the Telephone Helplines Association (THA), one of the organisations which subsequently merged to form Helplines Partnership.

The Standard has been continuously developed and refined since then and this updated version reflects the latest changes in the helplines world.

Helplines Partnership is committed to raising standards across the sector and strongly encourages helplines to demonstrate their commitment to quality and best practice for the benefit of their callers, funders, staff and everyone impacted by their service.

Guidance: The Assessment Process

Workshop



Helplines Partnership periodically runs free workshops and attendance is strongly recommended if you intend to undergo the assessment process. The workshop will explain the steps in more detail and guide you through some of the most frequently encountered challenges. You can find the next workshop [here](#)

Self-Assessment



You can use the tool at the back of this publication to help carry out a helpline self-assessment against the requirements of the Standard. This will help you to identify the work that will need to be carried out as part of the assessment process.

Application and Agreement



When you are ready to proceed, please contact services@helplines.org for an application form and then send it back to us. We will then provide an agreement to sign, and when this has been completed we will let you have your evidence template and submission instructions. Assessment fees are detailed on our website.

Evidence Submission and Assessment



We will agree a date by which you will need to complete your evidence submission online. This is normally within six months of signing up to the process. Your evidence will then be reviewed by an assessor.

Assessment Visit



Your assessor will conduct a visit during which they will observe at least two helpline workers, spend some time with the helpline manager, and speak to some helpline workers. This is so that the assessor can corroborate the written evidence.

Follow up



The assessor may conduct some follow up work to verify written evidence, for example emails or phone calls with partners or funders.

Sample Contacts



The assessor will contact your helpline through all its channels to verify written evidence. These will not be 'mystery shopper' contacts and if the assessor speaks to anyone they will reveal who they are and why they are calling.

Assessors' Report



The assessor will compile their report based on the evidence submitted, observations and discussions against the criteria of the Standard. The report is then internally moderated and verified.

Final Report



Your report will be sent to you no more than two months after all your evidence has been submitted, along with your certificate of accreditation and the Helplines Standard logo. Your report will contain a summary of the criteria, and will detail some things you have excelled in. It will also offer some recommendations where additional work could take place to further improve the quality of your service. If you do not pass the accreditation, you will have an option of three months' extension to gather the missing evidence and to resubmit. This may incur additional charges.

Expiry



Accreditation lasts for three years from the date of your final report.

Structure

The Helplines Standard consists of criteria grouped into three sections:

1. Planning and running your helpline
2. The service you provide
3. Recruitment, training and development

Each section breaks down into numbered subject headings containing individual criteria identified by a number and a letter such as:

2 b) Operate and monitor a clear data protection policy in line with the helpline's requirements and appropriate legislation

It is important to note that not all criteria will be relevant for every helpline. There are some criteria which may not be applicable if you do not operate a particular type of service (such as an online forum). You do not have to provide evidence for these criteria.

Each criterion contains guidance about:

- How it will be assessed
- What the assessor is looking for
- Examples of evidence

The suggested evidence examples are provided for guidance and are not an exhaustive or prescriptive list. Please feel free to supplement evidence in line with the guidance below.

Evidence submission and assessment

After signing up for assessment to the Helplines Standard you will receive a template to submit your evidence. The written submission for each criterion should not exceed 250 words, but can be supplemented by documentation of the type referred to in the 'examples of evidence' box. In your written submission you must specify the appropriate document/s and the location within it e.g. "see document 9a page 2, para 4."

The assessor will also take the opportunity to corroborate the evidence submitted through questioning and observation. You can see where this will happen where the assessment type is shown as 'assessment visit'. Some criteria are only assessed when our assessor visits your helpline, and some are also supplemented by contact with relevant partners. This is also shown in the 'how it will be assessed' box.

We will be looking for evidence which is:

Clear	Your evidence needs to be easy for an assessor (who is unlikely to be a specialist in your subject area) to understand.
Specific	Your evidence needs to give particular examples of how you meet the criteria with relevant dates and details included. This helps to avoid general statements which simply repeat the criteria.
Sufficient	Your evidence must meet each criterion in full and satisfy all of the necessary requirements in the 'what the assessor is looking for' box.
Current	Documents, policies, plans and budgets must be in current use and have been reviewed within the last three years. Systems and procedures must be in current operation. Examples should have taken place in the last 18 months.

It is good practice for someone within your organisation who is unconnected with the helpline to read the submission. This will help ensure the content can be easily understood and that you have avoided making assumptions about the assessor's knowledge of the service.

Planning and running your helpline

1: Mission, aims and strategic planning

a	Have a clear and current definition of the helpline remit
b	Have clear success criteria, that are regularly reviewed and which demonstrate the impact of the service
c	Develop the capacity, competences and structures required to deliver the helpline
d	Have a realistic plan for the financial sustainability of the helpline
e	Keep up to date with external developments that are relevant to the helpline and use to forecast and plan appropriately
f	Communication with other parts of the organisation is effective and regularly reviewed
g	Identify and develop formal arrangements with partners or suppliers
h	A process is in place for responding to media and other external enquiries

2: Confidentiality, data protection and risk

a	Operate and monitor a clear confidentiality policy in line with the helpline's requirements and relevant legislation
b	Operate and monitor a clear data protection policy in line with the helpline's requirements and relevant legislation
c	Operate and monitor a clear safeguarding policy and process and act on any immediate risks to the safety of the service user and others
d	Review risks to the continuity of the helpline service and have a plan to test, action and communicate management of these risks

3: Operations

a	Plan resources by forecasting effectively and scheduling helpline workers to meet demand
b	Establish appropriate operational targets and monitor performance across all channels
c	Provide clear policies and guidance to enable helpline workers to handle different types of service user across all channels
d	Make changes to operational procedures and policies in response to the changing needs of service users, and ensure that they support the helpline's success criteria
e	Monitor helpline income and expenditure against budget and take action to anticipate or respond to significant variances
f	Provide information that funders or commissioners require in agreed formats and timescales
g	The effectiveness of relationships with external organisations is regularly reviewed

4: Technology and resources

a	Develop and maintain IT and contact systems which meet the needs of the helpline and its service users
b	Ensure that the purpose and operation of IT and contact systems are fully understood by helpline workers
c	Ensure that helpline workers have access to reliable and current information in order to meet the needs of service users
d	Record, assess and resolve potential problems with IT, contact systems and other physical resources, including facilitating continuity of service in defined situations

The service you provide

5: Service user experience

a	Develop and deliver easily accessible messages to potential service users which provide accurate and current information about the helpline
b	Set and publish service standards that service users can expect
c	Collect information from service users regarding how they found out about the helpline and adjust communications accordingly
d	Develop automated responses which are prompt, accessible and accurate
e	Inform service users if real-time conversations (including instant messaging) are subject to recording

6: Interactions with service users

a	Helpline workers make appropriate preparations before initiating or responding to contacts
b	Helpline workers handle contacts courteously and informatively within a framework appropriate to the helpline
c	Helpline workers explain the reasons for asking a service user to provide information about themselves or others
d	Helpline workers provide sufficient and timely opportunities for the service user to express their feelings and needs
e	Helpline workers identify, acknowledge and clarify the situation, feelings, needs and expectations of the service user
f	Helpline workers generate options that respond to the needs of the service user in line with the remit of the helpline
g	Helpline workers communicate in a manner appropriate to the channel and to the needs and preferences of the service users
h	Helpline workers respond constructively if the needs of the service user are outside the remit of the helpline
i	Helpline workers acknowledge difficulties in communicating with service users and take effective steps to mitigate these
j	

	Helpline workers check the service user's understanding of responses given and take steps to improve understanding if necessary
k	Helpline workers summarise the key points of the contact and the nature and timescale of any follow-up action, and carry out agreed actions

7: Social media and online services

a	The helpline has social media / online services policies and procedures in operation
b	Where service users can communicate with each other, publish clear guidance to enable them to express themselves appropriately and ensure that this is applied when necessary
c	Regularly review and amend guidelines
d	Regularly review and monitor user-generated content and remove or edit content which does not follow the guidelines
e	Enable service users to report inappropriate behaviour of other users

8: Performance, monitoring and development

a	Performance standards for the helpline service are set and regularly reviewed, and reliable measures are used for quality assurance
b	Service user complaints, compliments and feedback is logged and reviewed with appropriate action taken and communicated back to service users
c	Involve stakeholders appropriately in the design and ongoing development of systems and processes
d	Provide opportunities for helpline workers to contribute to the ongoing development of the helpline

Recruitment, training and development

9: Human resources

a	Have a clear HR policy and recruitment procedure, including relevant safeguarding legislation, for both staff and volunteers
b	Paid staff are aware of their individual benefit and welfare entitlements
c	Volunteers are managed appropriately
d	The organisation has defined acceptable performance levels for staff / volunteer attendance and retention
e	Implement measures to support the physical and mental health and safety of helpline workers

10: Recruitment and selection

a	Define the skills, knowledge and experience required for all posts and make available to prospective staff and volunteers
b	Have a recruitment and selection process for every role within the helpline

11: Training

a	Helpline workers can demonstrate appropriate skills and knowledge before taking contacts from service users without close supervision
b	A process is in place to ensure helpline workers other than frontline workers receive training appropriate to their role
c	Regularly review the effectiveness of training and make appropriate revisions
d	Helpline workers receive training on self-care
e	Helpline workers understand the organisation as a whole and the different activities it performs

12: Supervision, support and continuing development

a	Provide regular and structured supervision for all helpline workers
b	A personal development policy is in place and implemented for all helpline workers
c	Regularly assess how helpline workers handle contacts against clear criteria and provide constructive feedback
d	Ensure that helpline workers have opportunities for timely support after difficult contacts

How has the Helplines Standard supported the quality focus of other services?



Working on the Helplines Standard enabled us to focus on reviewing and developing all aspects of our operations, looking not only at our communications with service users but areas such as staff management and support; external partner liaison and financial planning. It helped us to identify areas that could be improved and do this in advance of assessment. It really left no stone unturned and helped us as a team focus our efforts, improve our operating procedures and ultimately ensure that bereaved and injured road crash victims receive a professional and quality service providing expert support during the darkest of times.

Sarah Fatica - Brake, the road safety charity



The accreditation will undoubtedly be helpful for our current funding campaign, for maintaining service standards, and our future development work. The whole process was a really good opportunity to improve, examine and update our policies, procedures and systems.

Claire Usiskin - YoungMindsUK



We are absolutely delighted to have been accredited to the Helplines Standard. The process has been very useful for us and it's good to know that we can reassure our service users that we provide a quality, accredited service.

Ellen Watters - Myeloma UK



The rigorous and exacting process of working towards the Standard has been as important as attaining the accreditation because we have been able to make improvements and adapt to meet our ever increasing demand. **Naomi Fitzgibbon - Irish Cancer Society**

Respect Helplines staff are extremely proud for achieving accreditation for the third time. Working towards accreditation has been a joint venture between Helpline Workers and management, everyone wishing to achieve a higher standard of service with our service users being at the heart of what we do. The support from Helplines Partnership staff allowed us to improve policies and procedures and offer a much better service to our clients. I would recommend that every helpline should aim to achieve accreditation. **Ippo Panteloudakis - Respect**



Glossary

TERM	DEFINITION
Channel	A means by which the helpline may be accessed, such as telephone, email, text message, instant message, online forums or social media
Contact	A single interaction between the helpline and a service user, for example a phone call
Effective	Functioning in a way that produces the desired result
Efficient	Functioning without unproductive effort
Guidance	Advice on how to implement plans, procedures or processes
Helpline	A service providing information, advice and/or support via non face-to-face channels
Helpline worker	Any person, paid or volunteer, who works for the helpline – including supervisors, managers, people who take calls or answer instant messages, and administrative roles
Partner	An external organisation or individual that you work with in order to support or deliver an aspect of your helpline service
Personal data	Information that could identify a living individual
Policy	An overall approach in relation to a specific issue
Process	A step-by-step method for doing something specific
Real-time	Where the service user and the helpline worker are in communication with each other at the same time
Referral	Passing information about a service user to another organisation so that the other organisation can take up contact with the service user

Service user	A person using any aspect of the helpline service
Signposting	Providing a service user with information about another organisation
Social media	Internet-based tools that allow people to communicate and share information with each other, such as Facebook, Twitter and YouTube
Specification	A detailed description of what is required or provided
Staff	A helpline worker either paid or unpaid (unless otherwise stated)
Stakeholder	Person or organisation with a legitimate interest in the helpline
Supplier	An external organisation or individual from whom you purchase a product or service
Systematically	A structured and documented way of doing things
User-generated	Material contributed by service users
Work environment	The physical area(s) from which the helpline service is delivered, which may include home working