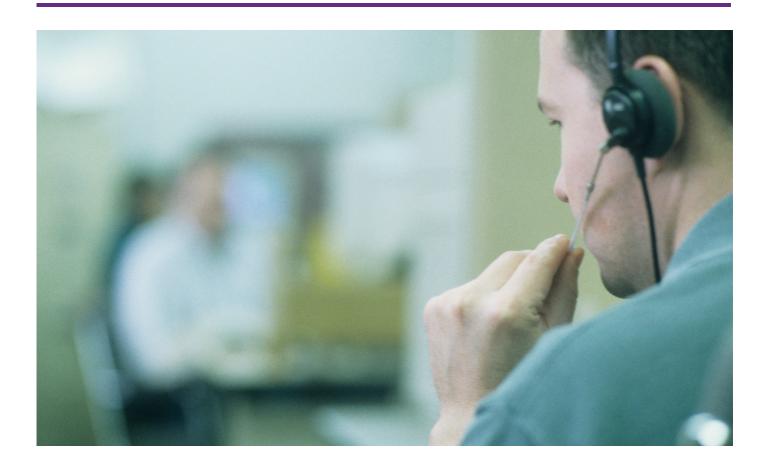# Toolkit | Setting Up

Setting up a helpline

The guide is for organisations who are considering setting up any type of non-face-to-face support such as a helpline, digital advice or support line, telephone befriending service, email or web chat support.

Setting up a helpline requires planning and thought. With over 22 years' experience of working with and supporting the helplines sector, Helplines Partnership has created this guide.

It will help you think about your service's remit, the resources you'll need, the technology you'll use and how to make sure the people using your service, and your team who are delivering it, are kept safe.

Do your research – identify and establish need

- Is there a genuine need for your service?
- Are there other organisations that already support this type of need? Consider on both a local and national level.
- Are there opportunities for partnership working to avoid duplication and make the best use of resources?
- Define the reach of your service considering factors such as: geographical area, age, gender and topic.
- Research the demographics of your potential service users and try to estimate likely demand, as well as how and when they'll want to access your service.
- How realistic is it that your service will be viable and sustainable?

What is the helpline's purpose and 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?
- Get the foundations in place and be realistic in what you can achieve. This will enable you to monitor progress and keep you on track.

Getting the right policies in place

- Policies should be clear and concise. Ensure your teams know and understand your policies and what they mean.
- Procedures, aims and objectives should be documented. Some, such as feedback and safeguarding, should be available in the public domain.

- You should have the following policies:
- Safeguarding
- Confidentiality
- Data protection
- Finance
- Risk register and business continuity plan
- Contact handling plans including challenging and repeat callers
- Feedback policy that includes complaint handling.
- Make sure your helpline team understand your confidentiality policy and are clear on when you share information based on risk levels and when you would breach a service user's confidentiality.
- Have clearly written procedures about how your service will handle, record and respond to complaints to enable consistent and effective action by your helpline team.

Delivering your helpline service

- Be clear on your service's limitations. Build and establish links with other safe and approved services that you can signpost service users to if their needs go beyond the remit of your service.
- Think about the information you will provide, any restrictions regarding contact duration and if and when your service may break confidentiality if there are safeguarding concerns.
- Have a quick and easy to access reference list of organisations to signpost to when necessary like our Find a Helpline.
- Think about your service's opening hours. It is easier to offer your service for limited hours and then increase later as your capacity allows.

- How will service users contact you? Consider various methods (channels) such as phone, email, text, SMS, webchat and forums. Start with one or two channels and then increase it if demand is there and you can resource and sustain them.

How will your helpline be structured and run?

- How will your service be funded from set-up and be sustainable in the long term?
- What resources will you need i.e. financial, staffing, equipment? Will your service be based in an office, will it be remote with people working from home, or a mixture of both?
- How will you provide support functions such as HR, insurance, legal and financial services, training, professional memberships, supervision, utilities, telephony and IT?
- Draft a business plan to include your organisation's: mission, objectives, strategy, budget, policies and structure.
- What staffing structure and roles does your service need? Will you have paid staff, volunteers or a mixture to run the service? You will need to think about: operational, frontline, supervisors, management, marketing, funding, IT, administrative, supporting staff and volunteers, trustees etc.

What will your helpline team look like?

- 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 and for providing online support?

- Who will manage, co-ordinate and support your call handlers? Without appropriate support you will not be able to provide an effective quality service and look after the wellbeing of your helpline team.
- Make sure all call handlers, whether volunteers or paid staff, are confident and aware of safeguarding procedures for when they come into contact with vulnerable service users.
- Your teams will need training. A mixture of both in-house and external is the best approach.

How will your helpline team work?

- 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 at least two people to answer enquiries.
- Think about how you plan and structure helpline shifts. Call handlers will require time away from the helpline. Breaks should be planned and abide by employment law and health and safety recommendations.
- How will you manage absences and staff and volunteer turnover?
- Will you have enough capacity to answer and respond to calls at peak times?
- Having clear, well communicated and planned helpline rotas will help you plan shift patterns, shift length and frequency.
- All shifts should have a designated shift supervisor who is available to talk to about any difficult calls and to debrief.

Helpline systems – getting the right technology

- Make sure your systems are suitable to operate your service effectively. Technology is constantly evolving and can 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 system helps capture, record and analyse your service information.
- What systems can you put in place to respond to spikes in demand? Collect and record demand data from the start to help you track and plan for anticipated demand.

Taking calls - telephony, phone numbers, phone lines

- What are your overall telephony requirements?
- How many phone lines will you need?
- Do you need physical phone equipment, or would a virtual call system be better suited to your needs?
- 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?
- How will you route calls to helpline workers? Will there be a need to play callers messages, transfer between helpline workers and will you record calls?

Taking calls - caller experience

- Think about the confidentiality of the service user and the helpline staff. If staff and volunteers are working remotely, make sure their caller ID is protected.
- Waiting times for service users should be kept to a minimum, especially if you don't operate a freephone line. You will need to think about the cost implications for your organisation and your callers.
- Service users expect confidential, affordable and accessible ways to contact your service.
- Talk to us to find out more about our partnerships with providers offering cost-effective solutions including:
- Virtual call centre
- Helpline freephone range
- Payphone access charge
- Discounted telephony
- Interpreting services
- Best practice is to have a separate helpline number to administrative or central numbers. Be clear so people know which number is which and sensitive helpline calls do not come in to administrative or central teams.

Promoting your helpline and communications

- How are you going to let people know about your service?
- Spend time developing a communications strategy. It doesn't have to be complicated but will help you focus on your purpose, objectives, audiences, messages, communications methods and workplan.
- Make sure your message gets to the right people by getting the views of a range of stakeholders including potential service users.

- Think about your service's online presence, your website. This will help to promote the service and it can also provide a way for users to contact you online through forums, online messaging and email enquiry forms, if you choose to offer these channels
- Make sure that your communications and marketing team keep in regular contact with the helpline team so they know about any messages or campaigns that are going out, are briefed about the content and can plan for the likely impact on call volumes.
- Social media can offer a cost-effective way of sharing your messages and promoting your service, but it can be time consuming.
- Make sure you are clear on all your social media channels about their remit and be prepared to redirect any help requests or contacts to your helpline service.
- Consider giving your communications and social media teams basic helpline training to give them the skills and confidence to redirect any contacts they receive to your helpline.

How will you monitor and evaluate your helpline?

- Think about what data you want to capture and why. It could be performance monitoring, resource management, demographic data or requirements from your funders or commissioners.
- Data management tools will help you to maintain, record and look at trends in your data. This is critical for evaluating your service and for evidencing your impact for future funding bids.

- Feedback from service users can provide useful insights that can help you to identify gaps in your provision, areas for development, opportunities for training and research, case studies and promoting your helpline.

Next steps

This toolkit is intended as an overview of the process of setting up a helpline, to help you think about the different areas you need to consider.

If you are thinking about setting up a helpline contact us for more information about we can:

- Support start-up services.
- Provide essential training for your team.
- Help you to measure the impact and outcomes of your service.
- Support you to achieve the Helplines Standard which defines and accredits best practice in helpline work.

Contact us

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