



Helplines Standard Brochure

www.helplines.org/helplines-standard



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About Helplines Partnership

Helplines Partnership (HLP) is the leading charity offering support to organisations who provide information and advice by phone, email, text and online.

HLP gives providers of helpline services a voice to help them build sustainability and promote excellence, choice and accessibility for everyone.

As such, we are committed to raising standards across the sector and strongly encourage helplines to demonstrate their commitment to quality and best practice for the benefit of their callers, funders, staff, and everyone impacted by their service.

The Helplines Standard certification plays a key role in providing independent assurance by Helplines Partnership that your organisation is delivering services that meet the highest standards in the helpline sector.







Clear, supportive and approachable in every interaction. It's a pleasure to be a member, as they keep NYAS up to date with relevant news and opportunities, and support us in ensuring our helpline is fit for purpose for staff and external service users. — NYAS, The National Youth Advocacy Service

About The Helplines Standard

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

The first version of the Helplines Standard was originally launched over 23 years ago and has been continuously developed and refined to reflect the latest changes in the helpline sector.

The Helplines Standard recognises and accommodates 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, including remote workers; and
-  multi-channel communications such as phone, SMS, email, live chat.

It also emphasises the importance of strategic planning and partnerships, which are essential for the sustainability of helplines.



A nationally recognised quality standard defining and certifying best practice in helpline delivery

About The Helplines Standard

The Helplines Standard consists of criteria grouped into four sections:

1. The Organisation's Strategy and Aims
2. Helpline Service & Aims
3. Helpline Operations
4. Human Resources

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

2a) Have a clear and current definition of the helpline remit.

It is important to note that not all criteria will be relevant for every helpline.

*Myeloma UK are proud to offer a Helplines Standard accredited service, and the accreditation process was very positive. By writing our submission and gathering evidence we were able to verify our policies, processes, and practice, making us more confident that we are offering the best possible service whilst maintaining the wellbeing of our helpline workers. — **Myeloma UK***

*The Helplines Standard certification process was the perfect opportunity to review how we work and ensure we are delivering a quality service. Pulling together the evidence proved a valuable exercise, providing us with the opportunity to update all our policies and processes and implement new policies and processes where needed. Accreditation involved the whole team, a motivating experience for us all to work together toward such a significant goal. — **Addiction Family Support***

Benefits of The Helplines Standard



Competitive advantage when seeking funding and partnerships



Enhanced credibility by demonstrating a commitment to quality and excellence



Greater visibility to potential service users and funders



Great motivator by acknowledging a commitment to best practice



Continual development within strategic planning and partnerships



Branding recognition and publicity via our Find a Helpline directory

The Assessment Process



The process gave us many opportunities to analyse our systems and thereby improve the service we provide. The accreditation gave a welcome boost to the confidence and wellbeing of our helpline team, other staff, donors and trustees. — **ERIC, The Children's Bowel & Bladder Charity**

Application & Agreement

When you are ready to proceed, please contact services@helplines.org for a no obligation application form. Return it to us and we will provide a quote fee.

If you wish to proceed based on the quote fee provided, we will send you an agreement to sign. The agreement covers the Helplines Standard Terms & Conditions, confirms the channels you wish to have assessed as part of the certification, and costs.

Once signed and returned, you will be provided with a guide and your evidence template, along with submission instructions.



If you have questions, please get in touch to arrange a free, one-to-one telephone or video call with a Helplines Standard Assessor to discuss your queries: services@helplines.org

Evidence, Submission & Assessment

We will agree on a date by which you will need to complete your evidence submission online. This will be addressed as part of the agreement form.

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 Helplines Standard Team is on hand to answer any questions you may have as you work through the process.

Once you've submitted your evidence, an assessor will review the submission.



The evidence submission date is normally within six months of signing up to the process. This ensures that you have plenty of time to collaborate with your team and gather the necessary evidence for your submission.

Evidence Submission & Assessment

There are some criteria which may not apply if you do not operate a particular type of service (such as an online forum). If this is the case, you do not have to provide evidence for this.

Each criterion contains guidance about:

- ⦿ How will it 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.



Some criteria are only assessed during the assessment day, and some are also supplemented by contact with relevant partners. This is shown in the 'how it will be assessed' box.

What we look for

Clear	Your evidence needs to be easy for an assessor (they are 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 the 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.

Sample Question

The Organisation's Strategy and Aims

1. Strategic Planning

1a) Have a clear mission, vision and values, and strategic plan for the organisation		
Criteria	Examples of Evidence	Yes/No/Information Required [For Assessor Use]
<ul style="list-style-type: none">• Demonstrate that the service's strategic plan is reviewed periodically and amended if required• Clearly defined mission, vision, and values statement• Service has a clear understanding and definition of its target audience• Strategic planning takes place regularly• Involve stakeholders, such as helpline users, trustees, etc., in strategic planning• Helpline being recognised as a core part of the organisation	<p>Appropriate sections of:</p> <ul style="list-style-type: none">• Helpline webpage• Publicity materials• Annual report• Meeting minutes/recordings• Strategy documents• Written account of changes resulting from a review• Focus groups, working groups, etc• Surveys e.g. stakeholders• History of the organisation and future planning• Proposal to commissioners	
Describe how you meet the evidence requirements (up to 250 words)		

Assessment Visit

Once your submission and supporting evidence has been received, you will be introduced to your assessor, who will work with you to arrange a mutually convenient date and time for the assessment day.

During the assessment day, the assessor will visit the helpline's base of operations. The first part of the day consists of reviewing your written submission together, gaining further clarification in areas where needed, and discussing procedures in more detail.

The second part of the day is where the assessor observes the operations of your helpline by listening in to calls and reviewing all other channels of support you are using. We also have an informal chat with two or three members of your helpline team.

Occasionally, the assessment day may take place remotely, dependent on the operations of your service.



Putting together the documentation for the Helplines Standard certification was a really useful and positive way for us to review our policies and procedures. There was excellent communication from the assessor, and the lead up process and assessment day were both handled with clarity of expectation, and sensitivity about our service and the people we support. — Sands

Follow Up & Sample Contacts

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

We may ask for additional documentary evidence based on the discussions and observations during the assessment day. The assessor will make it clear what documentation is required, and will allow extra time for this evidence to be submitted.

The assessor will also 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 immediately identify themselves and explain the purpose of the call.



Our recent auditor was great. She instantly made us feel comfortable. The day gave us lots of opportunities to have a discussion on the challenges we faced, and also tighten our processes for the team. They came in as fresh eyes, discussed new ways of working, which is always welcome. When I received the audit report, I was so proud we had achieved our second accreditation. —
Nottingham Community Housing Association

Final 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.

We aim to send the final report to you within 4-6 weeks following the assessment day.

If you have met all the criteria required for certification, you will also receive your certificate, certification letter, and the Helplines Standard logo alongside the final report. We will also post about your certification achievement on our social media platforms.

If you do not meet the criteria to achieve certification, you will have an option of a three months' extension to gather the missing evidence and to resubmit. This may incur additional charges.



Your report will contain a summary of the criteria, and will detail some areas of achievement, whereby the helpline has demonstrated good practice. It will also offer recommendations where additional work could take place to further improve the quality of your service.

18-Month Review

At the mid-point (18 months), we will contact you to request an update on the recommendations we made in the report, including any major service changes. You will be sent a short form to complete covering these areas.

If HLP becomes aware that specific criteria are no longer being met, we reserve the right to investigate this and may subsequently suspend permission to use the Helplines Standard logo unless or until we are satisfied that these criteria are being met.

Please note that there is no additional fee required for completing the 18-month interim report, as your initial fee includes this.



REVIEW

The Helplines Standard Team was supportive every step of the way, including on the assessment day, which was a good opportunity to discuss our successes and gain recommendations for how to improve our services further. We are now in the process of acting on recommendations from the Helplines Standard report and we are scoping a language translation service that we hope will help us reach more people affected by myeloma. — Myeloma UK

Expiry & Re-Certification

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

We will contact you nine months prior to your expiry date. This is to give you plenty of opportunity to sign up to re-certify and ensure your certifications run concurrently.

If your current certification expires and you do not apply for recertification, we request that you remove any reference to the Helplines Standard certification from your website or marketing materials after this date.



As a result of going through helpline accreditation, we have developed new training modules, enhanced the support and supervision of our helpline call takers and implemented standardised processes and procedures. Accreditation reflects our commitment to excellence and underpins our ethos of continuous improvement to the benefit of the charity and our clients. It's been an achievement that we are not only immensely proud of, but one that has been well received by funders in our grant reporting and applications. — Addiction Family Support

Fees

Helplines Standard Certification Fees	Member fee	Non-Member fee
Certification — preparation and assessment of two channels at one site, to include the Helplines Standard guidebook	£3055*	£5090*
Fee per additional channel, for e.g. text, webchat, forums, social media	£490	£820
Fee per additional visit, for e.g. additional bases	£660	£1,102

*Price subject to specific requirements, VAT and Assessor's expenses

As an organisation, we work with a lot of corporate partners and funders. Having the Helplines Standard means we can demonstrate to them that we are meeting industry good practice. The external benchmarking is something they understand from their own sectors. — **Mind**



Members of Helplines Partnership benefit from a 40% discount on standard fees for The Helplines Standard, helping you demonstrate excellence in helpline service delivery.

How do I find out more?

Helplines Partnership offers a free, remote one-to-one telephone or video call with a Helplines Standard Assessor.

We strongly recommend this if you intend to undergo the assessment process for the first time. The call will explain the steps in more detail, guide you through some of the most frequently encountered challenges, and answer any additional questions you may have about the process.

For more information or to book your free one-to-one call, contact us at:

 services@helplines.org

 0300 330 7777

 www.helplines.org

This is a good news story! We can use it in our publicity materials and communications to our members, in tender bids and when asking for funding. Additionally, it is a big confidence boost as it confirms that we offer an outstanding service - we always felt that we did but to get affirmation from an organisation such as yours makes it official.

— *thirtyone:eight*

The Helplines Standard gave us a chance to review how things were done, and realise that not everything was written down; it helped us identify training needs. As our service has expanded to include using helpline volunteers, having the Standard in place meant that we were able to bring them into a structured training programme.

— LawCare