



SETTING UP A HELPLINE CHECKLIST

There is a lot involved in setting up and delivering a helpline, both in terms of money, time and resources and it is of paramount importance that it is delivered safely and sustainably.

We have developed this short, simple checklist, to help you establish a clear idea of the remit and way in which your helpline service would operate.

THINKING ABOUT YOUR SERVICE

1. Is there an unmet need for your service or are there already organisations offering the same type of support? Our [Find a Helpline Directory](#) can help you check
2. What is the main aim of your proposed service? Will you offer advice, support, information or signposting?
3. Who will your service support? Can you define and identify the different types of people who will access your helpline?
4. What legal form will your helpline take? The Charity Commission can help you explore the different options www.gov.uk/government/organisations/charity-commission

DELIVERING YOUR SERVICE

1. How will you fund your service? Do you have grant funding, through fundraising or will it be self-funded?
2. Who will deliver your helpline service, staff, volunteers or a mixture?
3. Have you identified the key policies you need to have in place to protect the organisation, staff, volunteers and the people using the service?
4. What safeguards do you have in place to make sure that your planned service is sustainable?
5. How will people contact your service and access support? By phone, email, text or webchat?
6. Will your helpline be based in a single location or will people work remotely?

NEXT STEPS

Having worked through the questions in this checklist you may decide that the best course of action is to approach an existing organisation to volunteer or partner with their existing service.

If you have identified a clear need, established a clear remit and funding then the next step is to work through our [Setting Up a Helpline Toolkit](#) which goes into more detail about the foundations, systems and processes you need to have in place.

Once you have completed the toolkit, you may decide that you would like to have a conversation with us about accessing our consultancy support to set up your service.