

Toolkit | Homeworking



Homeworking on a helpline

This toolkit is designed to help you think about how to make the change from delivering your helpline, webchat or listening service from a central, office base to homeworking.

Homeworking can present challenges so it's important to take time to really think about and plan how you will approach transitioning to homeworking. It will require adjustments for the organisation as a whole and the helpline team.

With over 25 years' experience of working with and supporting the helpline sector, Helplines Partnership has created this simple toolkit.

It will help you to keep your team engaged, feeling supported, your service users safe and protected and, your service up and running.

Plan and prepare for homeworking

To make the change to homeworking or working remotely as an organisation you need to change how you think.

How you think about planning and delivering work will need to change and it may mean that you need to make other changes as a result.

It's not a decision that should be made in isolation. It should be part of larger organisational thinking.

Practice your plans

You may already have spent time thinking about your Emergency Response, Disaster Recovery, Contingency and Continuity Plans, which sets out how your organisation would operate if your building flooded or teams were unable to get to work due to bad weather.

This can be used as the basis for your technical planning for approaching homeworking. Whether you use the model you set up in your plans or you adapt it for permanent homeworking, make sure you test it.

Set aside a day where your team works from home to make sure that all your systems are working and you can make any changes that you need to before you put all your homeworking systems live.

NCVO, in the [study zone](#), have resources to help you write your own Disaster Recovery and Business Continuity Plans which can help you start thinking about the systems you need in place.

Is homeworking right for you and your team?

There are lots of benefits to homeworking; financial, work life balance, access to a greater range of potential employees and greater flexibility.

However, homeworking isn't right for everyone and not everyone is suited to homeworking.

Factors that can make homeworking difficult or impractical:

- Physical space – not having a suitable area at home to work from.
- Infrastructure – poor internet connectivity.
- Equipment and systems – from IT and systems to physical items like a desk, phone and computer. It's important to have reliable, secure and safe equipment and tools.
- Costs – the cost of homeworking, if some of it is borne by the member of staff or volunteer such as high-speed broadband connection, can make it prohibitive.
- Family commitments – there may be no-one to look after children in the household.
- Safeguarding – you need to be able to apply the same levels of safeguarding for homeworkers as those working from an office base:
 - how you will record, store and transfer sensitive information in line with GDPR and confidentiality?
 - what processes will you need to introduce to mitigate risk such as referrals and breaches?
 - how will you monitor the safe practices of those volunteers and staff with access to caller's information?

All of these are factors helpline managers need to consider when thinking about switching some, or all, of a helpline team from an office base to remote working.

Helpline systems for remote working

With a remote working team, it's essential to have the right equipment, systems and technical support in place.

It is easy to feel isolated and frustrated if the tools needed to do the job aren't up to scratch or present barriers to communication.

- Invest in good IT systems and equipment and make sure that all your team members are trained and confident in using them.
- Cloud based systems, accessed by a virtual private network (VPN) give you online privacy and anonymity by creating a private network from a public internet connection.
- Virtual call centres will allow you to reroute, redirect and answer calls as well as record messages from callers when your service is closed.
- If you have an answer machine function when your service is closed, or everyone is on calls, make sure the whole team can access it.
- Be aware of safeguarding around messages left by callers. What if a voicemail was life threatening or high risk and you had a helpline team member at home with only virtual support?
- Systems and service providers members are already using to work remotely include: Call Handling, Microsoft Teams, Zoom, Numeric Futures, Office 365, Oracle, Horizon and Skype.

- Instant messaging systems, such as Microsoft Teams and, provide instant communication and can be left open throughout the day so that team members and helpline managers can keep in touch. However, instant messaging systems are not a suitable forum for discussing calls and the content of calls.
- Systems that provide a virtual receptionist service can help you to triage calls and manage call volumes.
- You can find out more about some of them [on our website](#).

Helpline homeworkers health and welfare

It is essential homeworkers look after themselves, their physical and mental wellbeing.

This means having a safe working space set up and ongoing support and regular communication from their team leaders, helpline coordinator or helpline managers.

Homeworking can be isolating and how your team is working and the service they are delivering can be affected if there isn't regular briefings and debriefs from a supervisor as a result of compassion or emotional fatigue.

When you are thinking about shift planning make sure they are at appropriate times, do not go on for too long and have breaks built in and that your team adhere to them.

Each team member should carry out a health and safety risk assessment which is reviewed by their manager.

Managing a remote homeworking helpline team

Making the change to managing a remote team is about more than just switching to Skype or Zoom meetings.

Connection is key. It's what makes the difference between having people feeling isolated at home and having a happy, safe and secure team.

- Introduce a homeworking policy, including a homeworker agreement, so that everyone is clear about their responsibilities around homeworking.
- Schedule in regular catch ups. How you do this will depend on the size of your team and your helpline's hours. For small teams having a daily 'check-in' call before the helpline opens, or debriefs, can help keep people connected. If you have a large helpline team or one that works shifts you may need to schedule in a couple throughout the day.
- The check-in calls are a good way to share updates, see how the team are feeling, share any challenging calls that have come through to the helpline and highlight any themes in the calls.
- Setting up buddies in the team can help to support people if they are not as confident with the technology they are using, are new to the team or just as someone they can check in with throughout their shift.
- If people are working similar shifts you can set up group debrief to save time and resource via Zoom, or similar system, so there are opportunities for shared learning and support.
- Offer an individual debrief session after each team member's session.

- Schedule in regular group meetings. If you work with a large team you may have to divide the session into smaller groups so that everyone feels heard. Being able to see each other can really help to make the team feel connected.
- Think about including more formal group supervisions in your group meetings – they can be a good way to deliver themed or updated training with team working together.
- Wherever possible, for your debriefs and group calls, make sure you can physically see each other using the camera on your computer or mobile, via Skype, Zoom or MS Teams.
- Make sure your team know how and where to access information about helpline rotas, how to contact you if they need support during a call and how to report safeguarding issues or concerns.

For helpline homeworkers

If you are working from home on a helpline these are some of things you can do to make sure you can do your job safely and securely from home.

Your homeworking space

- Find a quiet space to work.
- Set up your workspace and make sure it's set up correctly. You should have a suitable table, or desk and supportive chair. If you're using a computer, make sure your screen and keyboard are positioned correctly. The HSE has a [home workers assessment](#) that you can use.
- When you are working, on shift, make sure that other people in your household know not to disturb you.

- If you have children at home, they should be looked after by a trusted adult while you are working.
- When you have finished your shift, it's important that you take care of yourself. It can be helpful to take a walk, have a shower, change your clothes or open the window. A physical action that separates you from your helpline shift can help to let go of calls you have listened to and move into the next part of your day.

Homeworking schedule

- Keep to a routine when you are homeworking, for most helpline teams having a shift pattern, provides a clear routine and structure.
- Get yourself ready for work as though you were leaving the house - to put you in the right mindset.
- Take regular breaks, just as you would do in an office, walk away from your workspace and make a drink. Do some gentle neck and shoulder exercises to relieve tension.
Bupa have a set of [desk stretches](#) you can follow.

Taking, recording and answering helpline calls from home

The people who use and access your service should notice no difference in how they experience your helpline when they contact you.

That means the same levels of caller confidentiality, service and caller experience whether your team are working from their home or your office.

- Callers may ask where the call is being taken, at home or in an office. To help team members feel that personal boundaries are being kept and for callers to feel assured in the continual confidentiality of the helpline it can be helpful for your team to be briefed with a standard response. An example statement could be *'our helpline team work remotely from private, secure and confidential spaces.'*
- Use what's readily available, free and easy for people of all digital abilities. Don't invent something new, it will take time and resources to create and train your team to use.
- Set up a secure login to your helpline's database, for example using a system like MS SharePoint. If this is not possible, then record basic data only.
- If you use a mobile phone to take helpline calls use headphones or an adaptor that lets you use a traditional headset. This will mean the team can take calls hands free.
- For some helplines it won't be possible to supply all homeworkers with a mobile phone. Where a team member needs to use their own mobile handset, IP telephony systems, allow your team to work remotely using their own mobile handset without disclosing their private number.
- Helpline teams should still be able to contact their manager or helpline coordinator if they need support on a call.
- Managers should be able to log in, remotely, and listen to calls as and when appropriate.

Next steps

This toolkit is intended to help you think about the different things that you need to consider if you are contemplating transitioning from an office-based helpline team to a remote, homeworking team.

Contact us

If you have questions about delivering a helpline service with a remote, homebased team, or want to learn more, talk to us about our specialist helpline training, consultancy services and membership.

Phone: 0300 330 7777

General enquiries


Email: info@helplines.org

Membership and Member enquiries

Email: membership@helplines.org

Training enquiries

Email: training@helplines.org

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