

Disability Rights Commission

Learning lessons: The DRC Helpline experience

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Executive summary

The Learning Narratives project contributes to the broad legacy strategy of the Disability Rights Commission (DRC). It considers what the DRC has learnt through its various activities since 2000 and focuses on specific activities or overarching themes where the DRC has had direct involvement.

Each narrative responds to questions such as 'why did we, the DRC, try to do what we did?', 'what worked?' and 'what didn't work and why?' and draws on a range of data sources, not least of which is the experience and expertise of DRC staff, both past and present.

The DRC Helpline experience explores what is unique about providing a Helpline for disabled people and looks at some of the key considerations which have informed this award-winning service.

The DRC Helpline Experience: Key Lessons

Planning and evaluation

- From the outset, build in systems which enable the 'raw' data from the Helpline to directly feed into strategic planning processes of the organisation.
- Getting the initial scoping for the service right from the outset is critical for both credibility and success with stakeholders. This will include determining whether to develop an in-house, outsourced or joint venture service.
- Regular evaluation of the service is paramount, and should involve representation from all stakeholders using the Helpline.

Infrastructure

- To meet the needs of an increasingly diverse disabled population the broadest range of communication methods for accessing the Helpline need to be available. The Helpline service needs to be at the cutting edge of new technologies.
- A three-tiered process for addressing contacts means appropriate expertise is available to deal with all levels and types of enquiry in a timely manner.
- Outsourcing the Helpline service has worked – strong working relationships have ensured the quality and ethos of the Helpline have not been compromised.

Helpline staff

- The expertise needed to run a dedicated Helpline service requires ongoing and sustained investment in staff training. Ensure a clear pathway for career progression is put in place.
- A Helpline service for disabled people requires much deeper consideration than simply implementing a call centre model. The primary reason for the Helpline's award-winning success is due to its ability to deliver a high quality personal approach, with staff acknowledging both the context and the nature of the contact's impairment and providing tailored support accordingly.
- A key outcome for Helpline staff has been the ability to empower contacts to have the confidence to take charge of their own next steps.

Marketing and audiences

- Establishing the Helpline 'brand' and its relationship to

the other services offered by the organisation has been crucially important, both to service users and also to staff working for the service.

- The Helpline continues to identify those hard-to-reach and hard-to-hear groups, and find innovative solutions to better improve their access to services.
- It has been important to communicate the range of issues the Helpline can address as well as those which sit outside of its remit. In the case of the latter it is key to ensure appropriate signposting mechanisms are put in place.
- Do not assume that all disabled people have access to the internet or are IT proficient.
- The development of a Frequently Asked Questions (FAQ) section on the organisation's website (and available in other formats), drawn from Helpline contacts, has been invaluable as a method of promoting the overall service.
- Ensure staff working in the wider organisation are fully aware of the work of the Helpline service – regular open days, where staff can sit in on contacts, are a powerful way of achieving this.

Introduction

This is the story of the Helpline run by the DRC. It describes how, from a service originally designed to simply fulfil requests for publications, the Helpline has developed to become fully accredited against the very highest standards, putting it alongside blue chip organisations such as Tesco and BT.

The story is undoubtedly incomplete without an understanding of the unique partnership that was established by the DRC's Commissioners shortly after it opened its doors for business in 2000. The DRC was adamant that it would not provide a call centre service, but something much closer to an empathetic and fully accessible Helpline. Original costings from consultants suggested that the establishment of an in-house service, sapping 25 per cent of the DRC's Human Resources, was untenable. The DRC thus embarked on a journey that ended with the establishment of a partnership contract between the DRC and SITEL – the leading customer contact organisation.

In this partnership, SITEL provide the technical expertise and high-volume contact handling service, whilst the DRC provides knowledge of the law, general intelligence, contact monitoring and contract performance management. SITEL also houses the DRC staff in its offices in Stratford-upon-Avon.

The DRC Helpline receives over 100,000 annual contacts by voice, text, videophone, freepost, fax and structured email via the DRC's website, handled by a three-tier system as follows:

- First-tier contact through a bank of SITEL colleagues, all of whom fulfil literature requests, basic signposting and determine which requests are beyond the Commission's scope.

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- Second-tier contact, referred by the first tier, to a dedicated team of highly trained SITEL advisers who can answer in-depth queries on disability discrimination law from disabled people, employers, service providers and educators.
- Third-tier support and monitoring of the first and second tiers provided by a team of nine on-site DRC Information Officers, a Training Manager, a Team Manager and an Information and Contracts Manager.

Such is the strength of the partnership between the DRC and SITEL that a career path from the second tier, dedicated adviser team, to the DRC has grown organically: the majority of DRC Information Officers previously held posts as dedicated advisers for SITEL.

In addition to the direct service the Helpline provides to its contacts, it also works in partnership with a range of organisations. These partnership arrangements, which are funded by the DRC, enhance the range of services offered to contacts and include:

- Signposting relevant contacts to the Centre for Accessible Environments, which provides advice and information to businesses on making premises accessible.
- Provision, through the Independent Panel for Special Educational Advice, of a casework service for contacts who have potential cases of disability discrimination against schools and local education authorities.
- Referral of cases to Free Representation Units, such as the Bar Pro Bono Unit, for contacts who have no other source of assistance and cannot afford to pay for legal help.
- Referral of Welsh contacts in need of casework to Newport and Flintshire Citizens Advice Bureaux.

The unique DRC–SITEL partnership

The decision to outsource the DRC Helpline to SITEL was one which has had lasting effects on the evolution and structure of the service as it now stands. The system of outsourcing a Helpline to a call-centre provider who then houses the Client and their staff was one which came with several potential risks. However, several notable benefits have emerged from the co-location of the DRC staff with members of the SITEL workforce.

A shared environment

Firstly, the shared working conditions of DRC and SITEL staff have enabled a constructive and long-standing partnership to evolve so that the Helpline has been formed, and continues to develop, as a joint venture. This has led to equal feelings of ownership over the running of the Helpline and the opportunity for SITEL staff to absorb first-hand the values and ethos which embody the DRC as an organisation. The co-location of these two groups of professionals has therefore created a unified brand for the Helpline, in which SITEL and DRC staff are seen to be working hand-in-hand towards a common set of goals and objectives. As a result, SITEL staff across the team claim to feel a deep sense of connection and alignment with the core value system of the DRC:

There is a real pride attached to being part of the DRC Helpline... Even though I'm employed by SITEL, I always tell people I'm part of the DRC. We feel like we are all working towards the same goals ultimately.

Helpline Adviser

Good communication

A second positive factor to emerge from this side-by-side working has been the ability of DRC managers to oversee important delivery decisions and update staff regularly on legislative developments. Whilst a strict client–provider relationship has never been played out in reality, the opportunity to be involved in the everyday decisions made in Stratford has served to strengthen the communication and understanding that exists between the two groups of professionals. The close working relationship of the past few years has therefore allowed SITEL and the DRC to develop a strong, constructive and lasting partnership in which their values have become aligned and their vision has become shared.

There is such a strong bond between the advisers and the rest of the DRC staff that it's hard to tell where the DRC ends and SITEL begins... There is no hierarchy, which sets the tone for a co-operative and supportive working environment in which you feel free to ask for advice without judgement.

Helpline Adviser

There are, however, a number of potential risks associated with the outsourcing of a Helpline to an external service provider and the consequential client–provider relationship such as that formed between the DRC and SITEL.

Quality over quantity

A tension emerges firstly between the need for efficiency required by a call centre infrastructure handling large volumes of contact and the core DRC mission towards providing a personalised and sensitive service to all contacts. The risks associated with transforming the DRC Helpline into an impersonal and overly-efficient call centre, in which the

quantity of calls becomes valued over call quality, are foremost in the minds of Helpline staff. Whilst performance management and target monitoring is necessary to maximise the through-flow of contacts, a balanced approach has been achieved by continuing to focus on providing personal and tailored support to reflect the specific needs of each contact. In light of this ever-existing tension, the opportunity for SITEL to gain insight into the values and objectives of the DRC over the past few years has been invaluable:

It is crucial that each individual is treated as different, and their personal case is handled with sensitivity and caring... a strict call-centre approach would be far too cold and impersonal to respond appropriately to the needs of a potentially very distressed person. This is why we need to continue to remind ourselves of our ultimate mission.

Helpline Adviser

Targets and monitoring

This is not to say that targets and monitoring do not play a role in the successful delivery of the Helpline service. Regular monitoring of each Helpline Adviser against an agreed framework of set targets is central to the process of identifying development needs and providing the necessary individual support. Pay structures are affected by the performance of advisers against these targets, providing clear incentives for staff to perform well against a broad set of criteria. There is thus the potential for excessive monitoring, which runs the risk of producing an overly-dominant focus upon hitting performance criteria rather than attending to the specific needs of the contact. Whilst the perfect alignment between the two is never likely to be achieved, the DRC Helpline has achieved a remarkable balance in which

advisers feel able to maintain quality of response whilst continuing to reach their personal targets (ie quantity of calls). By achieving noteworthy performance targets, such as the answering of 99 per cent of calls within 31 seconds by frontline staff, the processes behind the Helpline support contact experience and ensure this experience is improved wherever possible.

Over-automisation

Helpline staff also remain mindful of the dangers of over-using technology for the purposes of increasing service efficiency. The likely outcome of over-automising the Helpline would be likely to retract from the personal approach for which the DRC is so widely appreciated. In light of the distinctive service the DRC Helpline provides, it is especially important to maintain the human contact needed to respond sensitively to the requirements of a diverse set of contacts. This has been reflected through the feedback of many Helpline users, emphasising the importance for those with varying disabilities of hearing a human voice at the other end of the line:

Personal contact will always be more important than any written information... especially people with mental disabilities need to talk.

Helpline User, Survey report

A focus on the needs of the contact

A successful Helpline can only come about through focusing on the needs of the contact, and especially recognising in the case of the DRC Helpline that disabled people are the most likely, though not exclusive, users of the service. The importance of empowering the contact is therefore paramount to the team, with a particular focus upon building the contact confidence needed to take charge of personal situations in a productive way. It is felt this is unique to the DRC Helpline. Advisers are committed to ensuring that each contact leaves the conversation with a Plan of Action and feels equipped with the knowledge needed either to take their case forward or to gain further information and support from elsewhere:

A lot of the people who call us feel isolated or are going through crisis. By providing them with information about their legislative rights, guiding them towards further areas for help, and encouraging them to take cases forward, we are directly empowering them to change their lives for the better. **Information Officer**

Flexibility

The need for flexibility when responding to calls is powerfully highlighted by the wide variety of people who call the DRC Helpline. Contacts range from those with physical and learning disabilities, long-term health conditions, people with hearing impairments and business employers to representatives from the Houses of Parliament. The ability to be able to respond appropriately to the needs of these varied

groups of people stems from a detailed knowledge of the area of disability, combined with a heightened level of sensitivity. There is a genuine concern amongst staff over the need to treat each contact as an individual, and provide a tailored and individualised response to each unique case.

Sometimes you have to spend 45 minutes on a call because either that person needs something explaining to them again, or perhaps they are suffering from short-term memory problems... we need to be given enough flexibility to respond to these personal needs rather than rushing people through calls and moving on to the next one.

Helpline Adviser

Helping a contact with short-term memory problems might involve providing information in spoken and then written form. More generally, call times might range from 2 minutes to over an hour in length, depending on the needs of the contact. Such examples demonstrate the way in which the Helpline aims to balance responding to every call individually whilst continuing to focus on performance targets:

Advisers treat all contacts as individuals and demonstrate empathy which is a quality that could so easily be lost when dealing with the volume of enquiries we receive. **Helpline Manager**

Adapting to the needs of disabled people

Having a flexible approach also includes considering factors which ensure an effective response to people with a range of disabilities. The Helpline provides a variety of services, including a partnership contract with Language Line for translation needs, web-chatting facilities, the availability of large print publications for contacts with visual impairments, Easy Read books for people with a learning disability, a range

of other alternative format publications, and the use of videophone services for those with learning disabilities or hearing impairments.

Generally, all forms of contact offered have worked well for both customers and advisers. It remains important, in this increasingly digital age, to continue to offer facilities such as Freepost and fax. The most technically difficult form of access to manage is that provided by the videophone – issues like ISDN lines, bandwidths and so on – are hard nuts to crack. Even when those issues are resolved, the quality of broadcast provided by the best available kit is still not good enough to use for signing or lipreading.

Careful attention has also been given to ensuring that the phone manner employed by Helpline advisers mirrors that of the contact, with the level of language used being appropriate in each case – a manifestation of the empathetic and genuinely concerned approach of all Helpline staff. Numerous quotes from users of the Helpline reflect the unusual care and consideration with which their calls are handled by DRC Helpline staff. For example:

[The DRC staff] were so friendly and listened like no other Helpline has... I was truly surprised.

Helpline User

Developing Helpline Advisers' specialisms

In 2005, the existing Helpline staff were separated into three distinct teams – Education, Employment and Service Delivery – to reflect the different sections of the Disability Discrimination Act (1995). The aims of this restructure were to enable more focused and in-depth training for advisers, reduce the length of contact queues and enhance the ability of advisers to provide more detailed and specific information to contacts about their rights. The smaller team structures have also led to a greater chance of contacts getting through to the same Helpline Adviser more than once, which has been thought to promote the establishment of longer-standing relationships and reduce the need to repeat case history. The allocation of staff to a dedicated team also allows for specialisation in a certain subject area which opens up potential for a number of career opportunities:

Working in the employment team means that you very quickly become very specialised in all areas of employment law, which means you can move onto a number of different careers... it also means that we can provide much more focused advice and information to specific individuals and apply our detailed knowledge to situations in a much more focused way. **Helpline Adviser**

Marketing of the Helpline

Effective marketing

When the Commission opened its doors for business, it was rightly keen to market the DRC Helpline, with an emphasis on the existence of the organisation and the service. With the lack of a National Disability Information Service, the DRC Helpline attracted traffic well beyond its remit – frequent questions included ‘How do I apply for a Blue Badge?’ and ‘How do I get a disabled facilities grant?’ Whilst such questions were properly signposted, taking contacts such as these beyond the Helpline’s scope was a significant drain on the Commission’s resources.

Thus, colleagues from the marketing team changed the ‘message’: all marketing material that noted the DRC Helpline’s details was amended to highlight what the service doesn’t or can’t do as well as describing what it can do.

Due to the implementation of that marketing strategy, the Helpline focused on its ability to meet the information needs of disabled people. Thus, where calls in areas such as benefits, housing, community care and human rights had previously taken up valuable time of frontline staff in redirecting contacts to appropriate services, the reduction in call numbers – from 124,000 in 2004/05 to 94,000 in 2005/06 – freed up frontline staff to handle mainly relevant calls, which were then filtered more efficiently to the teams of advisers.

An associated benefit of this marketing approach was a reduction in the number of complaints to the Helpline, which were found to stem primarily from a lack of understanding as to why the Helpline was unable to deal with requests in and

around the areas the DRC – and its communications tools, such as the Helpline – does not deal with.

Going further than the call of duty

Although not all queries posed by contacts can be answered or dealt with appropriately by Helpline staff, the Helpline still seeks to go beyond the call of duty and ensures that every contact with issues beyond the Helpline's remit is signposted appropriately to somewhere, or someone, who can help. It is instilled within the culture of the Helpline to go one step further in providing the most helpful alternative options and ensuring that each contact ultimately receives the best help available.

Sometimes just by going a bit further and actually finding someone a number or a particular reference, you can make all the difference... a little extra effort on our part to Google a contact can help someone who might not have access to the internet, or might not have been bothered to make that call otherwise. **Information Officer**

Proactive marketing

As well as ensuring the DRC Helpline isn't seen as a source of information for areas it cannot help with, careful attention has also been directed towards proactively marketing the Helpline to those who may not have had the opportunity to hear about the service previously. An ongoing mission towards targeting hard-to-reach and hard-to-hear groups has been launched to communicate how the DRC Helpline may be able to provide the support these groups (such as women from certain black and minority ethnic communities) require.

We need to continue to advertise the Helpline through a range of media and make sure we are visible on all DRC publications, not just the internet. A surprising number of disabled people don't even know the DRC exists. We need to target areas where people don't have the opportunity to find out about the support we can offer, rather than wait for them to come to us. **Information Officer**

The DRC website

In noting the DRC Helpline and its reach as just one of the DRC's communication tools, it is clear that the DRC website also plays a pivotal role both in promoting the services of the Helpline widely and supporting Helpline staff with the provision of information to disabled people, their families, friends and businesses. The findings of a recent survey exploring the relationship between the DRC Helpline and the DRC's website pointed particularly to the close relationship that exists between the two communications tools from the point of view of contacts. As such, the Helpline is often used in conjunction with the website by contacts who need help with interpreting website information or to discuss the implications for their specific case. In addition, Helpline data can provide important guidance on the kind of information that needs to be on the DRC website, and DRC staff have played an important part in producing a range of FAQs for the DRC website.

Continuous learning and improvement

Surveying

The DRC Helpline has a strong commitment to ensuring that efforts are maintained to continuously improve, update and enhance the service it provides. Whilst recognising its achievements and successes over the years, Helpline managers have been keen to continue to challenge each other and their staff to strive towards achieving even greater goals and ambitions. The commitment to gaining feedback from a wide range of sources is shown most clearly through the commissioning of a quarterly survey to gain feedback directly from users of the Helpline. This independent survey is conducted with around 100 contacts on a 1:1 basis to produce both qualitative and quantitative feedback from Helpline users on all aspects of Helpline performance. The feedback has yielded a continuous trend of positive reports reflecting the pivotal role the Helpline has played in equipping contacts with the confidence to proceed in resolving their individual cases. For example:

Respondents considered that the DRC had played a pivotal role in the resolution of all their cases... the DRC had provided contacts with enough confidence to proceed... had removed uncertainty about their rights... and had described the course of action in step-by-step and practical terms.

Report on survey of Helpline users, June 2006

Relationship with data

Although the quarterly feedback surveys can be seen as a success, they can also be seen as a missed opportunity. The surveys provide a rich mine of data and information whose application could be much wider than simply understanding who uses the Helpline. Though some casework of the DRC's legal team comes about as a result of calls originally made to the Helpline, it is the case that the DRC has not made best use of Helpline data and information to inform its strategies and objectives, much less determined exactly what data is available and of how it can be useful. Perhaps the best example of how data generated by the Helpline has been used well is in the Legislative Review completed by the DRC in 2003; otherwise, data and information has not been exploited to the best of its potential uses.

Internal marketing and feedback

The scheduling of monthly Open Days during which the Helpline is opened up to all DRC staff and internal groups – such as the Learning Disability Action Group (LDAG) – is another method for encouraging feedback and recommendations for improvement, whilst also presenting the opportunity to promote the work of the Helpline internally within the DRC. The need to continue challenging existing methods of working through internal feedback is considered to be of crucial importance in the continual push towards the growth and development of the Helpline. The creation of a working culture in which staff feel safe to bounce ideas off each other and challenge behaviour has also been especially productive in building strong channels of accountability between different levels within the team:

You can never be complacent when you are providing such an important source of advice and support to so many people... whilst reducing call

waiting times to just 3/5 minutes is an achievement, we are continuously looking to improve upon these and all other aspects of the service we provide.

Helpline Manager

Training opportunities

Another aspect of the DRC Helpline's commitment to continuous improvement is the provision of highly-structured, ongoing training opportunities to ensure that advisers are kept up-to-date with changes in policy, legislation and disability rights. Innovative techniques used to embed the learning, include mock telephone calls, the acting out of various scenarios and opportunities for call-shadowing to help develop emotional resilience ie the ability to not be affected by the often difficult and emotive scenarios Advisers are told about by contacts. In line with the wider ethos of the Helpline, this training is designed to be flexible in its approach to equip staff with the skills required to adapt to the differing needs of each contact:

The training isn't too heavily focused upon providing scripted and robotic responses to calls – it provides you with the knowledge to respond appropriately but adapt to whatever the contact is wanting to talk about. It's best that way or it seems distant and unfriendly. **Recently-Trained Adviser**

The Helpline Advisers have also benefited from a training programme which has involved colleagues from all parts of the DRC. This has both widened the Advisers' knowledge of, and interest in, the DRC's work, and ensured that they feel part of the Commission and its Vision.

Personal development

A duty to the continuous personal development of staff is illustrated through opportunities for 1:1 coaching, which offer support for Helpline Advisers in the areas where it is most needed. These opportunities have served to boost staff morale by enhancing feelings of being valued and establishing paths to further career progression. Continuous knowledge expansion and learning is also promoted by the regular circulation of memos and updates, coupled with dedicated reading time each week in which staff are encouraged to read up on current policy areas and continue to broaden their understanding of disability issues.

The ongoing learning culture here means that you never feel like you are stagnating as you are constantly learning more about the area and new methods for helping... I feel as if I am always growing in what I can offer and the methods I can use to help. **Helpline Adviser**

A distinctive internal culture

Supportive culture

The unique nature of providing a Helpline service for disabled people promotes a distinctive, supportive internal culture. The retention levels of staff working for the DRC Helpline are significantly higher than for any other contract managed previously by SITEL. When asked what makes the Helpline such a worthwhile, satisfying and unique place to work, staff are unanimous in their description of an internal culture which is free from judgement and focused upon encouragement, knowledge-sharing and individual personal development. 'Buddy systems', in which newly-appointed staff are coupled with more experienced members of staff who provide advice and support, also contribute to the feeling of security and support – a feeling which continues throughout time spent working at the DRC Helpline. The '3-tier' system of support has also led to the development of strong staff consultation processes which have had positive effects in promoting an open culture of sharing and proffering opinions free from judgement:

The Helpline really is like a family – you feel accepted rather than judged, and the genuine concern of those around you for the contacts they are helping is infectious. You are free to ask for help and advice at any time, and constantly feel like you are developing. **Helpline Adviser**

High job satisfaction

The high levels of job satisfaction experienced by Helpline staff are largely put down to an ability to provide life-changing advice on a daily basis to people who are in genuine need. A deep commitment and loyalty to the work of the DRC Helpline is clear to see amongst staff, and in part a function of the important nature of the work they do and a genuine concern towards providing the best possible service they can. The words of one Helpline Adviser sum up the reasons why the retention of staff on the Helpline is so high:

I have never stayed in any job for more than three months in my life, but the DRC Helpline is a completely different experience. The feeling of genuinely helping people everyday, and loving the people you work with is unique and makes you want to stay. **Helpline Adviser**

Positive atmosphere

Providing support and information to contacts who face daily prejudice and inequality can be emotionally demanding and has had the potential to lower morale within the team. The need to create a positive atmosphere and provide relief from the emotional demands of the job is therefore paramount in the maintaining of a productive working environment. The DRC Helpline Praise Board is an example of one way in which staff receive feedback on the positive effects of their hard work and guidance on the lives of those they support.

The board is situated beside the calling floor and posts a selection of the numerous thank you letters and cards of appreciation from all those who have been positively affected by the support and advice of the DRC Helpline staff.

You need to be lifted sometimes and reminded of all the positive work you are doing to help those in need... seeking and providing positive feedback from both contacts and colleagues is a crucial part of keeping strong and focused on our objectives. When morale is low we all pull together; it is a 'team' in the most pure sense of the word. **Helpline Adviser**

Achievements

The DRC Helpline does more than simply respond to contacts. In doing so there are many achievements of which it is proud. In 2003, it won the BT award for Best User-Focused Helpline; the Helpline is also fully accredited by the Community Legal Service and has most recently been accredited with the Customer Contact Association Global Standard.

Conclusion

When asked what makes the DRC Helpline so unique, both DRC and SITEL staff are in agreement that it is the supportive culture, the dedication of their colleagues and the genuine passion for supporting disabled people which makes the DRC Helpline such a worthwhile and satisfying place to work. The words of one Helpline Adviser embody the commitment of a group of people who are motivated by a genuine passion to help and support disabled people, their friends and family members:

If I won the lottery next week, I can honestly say that I would continue to come in and work on the Helpline. It is more rewarding than anything else I have ever done, and nobody here is in it for the money. We are here because we care.

Helpline Adviser

This narrative is most appropriately closed by a DRC Helpline user:

I spoke recently with an adviser who was excellent. She gave really detailed advice and followed this up with a pack of information which arrived two days later. I have used the information to help a trade union member and just wanted to pass on his thanks as well as my own. It is not often that you get such good service coupled with such efficiency.

Helpline User