

Planning framework for setting up a new emotional support service

This should be used in conjunction with information on Setting Up a Helpline on www.befrienders.org, which includes checklists for identifying the wider needs and context and Guiding Policies and Practices guidelines.

The activities below will vary depending on the nature of your activities, whether they are by telephone, email, face to face on the premises, or face to face through outreach.

Code	Activity	Notes	Complete
A	<i>Launch the organisation</i>		
	Company set up		
	Bank account		
	Legal registration		
	Liability insurance		
	Appoint solicitor		
	Appoint Board of Trustees		
	Appoint accountant/book-keeper		
	Create company records system		
	Set up a fundraising committee; develop a fundraising strategy		
	Fundraise		
	Set up a publicity committee; develop a publicity strategy		
	Finalise project plan, budgets and documentation		
	Identify initial indicators of activities and impact		
B	<i>Prepare premises</i>		
	- Define search criteria and budget		
	- Search		
	- Select		
	<i>Calculate maintenance cost</i>		
	- Electricity		
	- Heating		
	- Water		
	- Telephone (including installation)		
	- Refreshments		
	- Essential kitchen/bathroom materials		
	<i>Negotiate and sign lease</i>		
C	<i>Acquire equipment</i>		
	- Telephones		
	- Computer(s); photocopier; fax; shredder		
	- Furniture; Filing cabinets		
	- Shelving (library)		
	- Stationery		
	- Kitchen equipment		
	- Bathroom equipment		
D	<i>Set up telephone system</i>		

	- Define telephone requirements		
	- Set up telecommunications group		
	- Install and test telephone equipment		
E	Set up website/computer system		
	- General information		
	- Volunteer records		
	- Steering group communication		
	- Call records/analysis		
F	Interview volunteers		
	- Prepare documentation		
	- Schedule and plan interviews		
	- Interview potential volunteers		
	- Discuss outcomes		
	- Record volunteer information		
	- Verify and notify volunteers		
	- Police check of volunteers (where appropriate)		
G	Obtain background operating information		
	Scan of local mental health services, prisons, suicide rates, cultural attitudes, language issues, particularly vulnerable groups, etc		
	Review sample operating guidelines		
	- Legal		
	- Social services		
	- Local requirements		
	- National requirements		
	Talk to relevant external organisations		
	Identify resource people (e.g. advisory psychiatrists, solicitors, etc)		
H	Define and document Principles & Practices		
	- Volunteer confidentiality		
	- Caller confidentiality		
	- Call analysis		
	- Organisational responsibilities		
	- Volunteer and staff responsibilities		
	- Grievance and disciplinary procedures for staff and volunteers		
	- Complaints procedure for service users		
I	Develop TOT course notes		
	Initial Training of Trainers sessions from external trainers (where needed)		
	Finalise Training of Trainer materials		
J	Train volunteers		
	Produce materials		
	- Produce draft		
	- Run pilot		
	- Review, and amend if necessary		

	Plan sessions		
	- Identify trainers		
	- Find and book location		
	- Notify volunteers		
	- Finalise plan		
	Run sessions		
	Prepare training environment		
	- Refreshments		
	- Equipment		
	- Room		
	Course delivery 1		
	Course delivery 2		
	Course follow-up/assessment		
K	Determine date to start the service		
L	Contact telephone and utility companies to arrange set up		
M	Set up support groups		
	- Select group leaders and mentors		
	- Set up other groups		
	- Notify volunteers and confirm their commitment		
N	Define volunteer rotas		
	Produce draft rota		
	Define backup procedures		
	Confirm with volunteers		
	Modify and finalise rota		
O	Arrange team-building event for new volunteers		
	- Find premises; Notify volunteers; Finalise numbers		
P	Set up office		
	Furniture and facilities		
	Build library		
	Final check of telephone system		
Q	Launch		
	- Publicity		
	- Start the service		

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