

10 top tips for offering remote information, advice and guidance (IAG) during a pandemic

Our charity's quality service principles are that IAG should be **accessible, professional, knowledgeable, client- and needs-led, impartial, responsive, friendly** and **enabling**.

These principles continue to guide our IAG delivery at this critical time.

All our staff have received IAG training, as per our Matrix Standard Accredited frontline service (www.matrixstandard.com)

Our IAG service has been well-established for a number of years with our First Step, Patient Support and Enablement teams delivering an average of 250 IAG interventions per month under normal circumstances. We were therefore well set up to move to a proactive and outward reaching service once the implications of the pandemic became apparent in mid-March.

- Over the first four weeks of lockdown we made **2,040 outbound calls**, providing direct support to **1,416 visually impaired individuals** (some people are called more than once).
- 73% of the calls made were between 15-30 minutes in duration.
- Of the people we have spoken to and rated in terms of their support needs (using our red-amber-green approach - see tip 2): 84% are green, 13% are amber and 1% are red.

1

Preparation is vital.

We needed to reach our most vulnerable service users first, so we produced lists of our service users by local authority area and prioritised them by age, whether they lived alone and if they had any other medical conditions. These lists were then passed on to staff to reach the people who really needed our help first.

Adopt a system to manage your calls.

We needed a system to ensure we could record our calls and assess peoples' needs.

We implemented a red-amber-green (RAG) approach to determine their vulnerability and inform our actions – there is a clear process for staff to follow about how to assign the RAG status to people they speak to. We record this in a shared spreadsheet so we have real time information about progress and actions.

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Get people across the organisation involved, if possible.

We utilised our team of volunteer Group Leaders, who were able to directly contact their members and feedback any concerns to our staff team. As well as offering a welfare check, this also acted as a be-friending service to allow Group members to keep up to date with each other's well-being.

Gather local information.

We quickly realised it wasn't much help making calls if we didn't know local info about support, such as shopping provision, etc. All staff research their local area and map the provision available and record this in a shared document. This is a live resource and updated daily as the situation changes so frequently.

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Have a script.

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Work out what you want to say and how you want your staff to be handling the calls and then set it all out in writing for them to follow. This way you have a consistent and professional approach across the board.

Prepare for the call.

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Advise staff to have everything they need to hand before picking up the phone. For us, this includes; the spreadsheet of contacts, the client database open (we use Microsoft Dynamics), a copy of the RAG process to hand, a copy of the script to follow, pen and paper, and a cup of tea!

Talking to people.

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Have some key questions you can ask people to help support them. Examples might include: 'How are you finding things?' 'What support do you have at present?' or 'What are you struggling with?'

There will be difficult calls.

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Staff need to be prepared that some calls will be difficult and could raise serious concerns. A system needs to be established for staff to report issues and raise concerns. You should ensure clear safeguarding processes are in place and lines of reporting understood by all. Clear principles should be in place if referrals are to be made to counselling services (internally or externally). All frontline staff and volunteers at Henshaws have undertaken additional mental health training, and are now all certified Champions of Mental Health (www.championhealth.co.uk)

Keep track of your progress.

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Monitor and report on calls made and actions taken – this way you can track what the issues are in your community and act accordingly.

Keep in touch.

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Many of the people you speak to may be managing fine and have support in place; however we have found things can change very quickly. Keep them on your radar and call back if you can; we have set up an informal telephone be-friending service so those people who are managing their day to day lives well but may be feeling lonely and isolated, have a regular call to just chat.