Top tips to support remote service delivery

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January 2022

1. Introduction

The paper draws upon a report produced by New Philanthropy Capital (NPC)[1] presenting 'top tips' for Building Connections Fund[2] (BCF) grant holders to support them in remote service delivery through Covid-19 and the future. The paper provides a summary of key information and learning presented in the full report. Where appropriate, reference is made to additional resources.

While the BCF programme focused upon reducing loneliness in England, and the NPC report was primarily written for BCF grant holders, the content of this paper is of wider use due to its focus upon remote delivery. The paper is specifically written for Funding Staff within The National Lottery Community Fund (The Fund), to support them with assessing grant applications and in their conversations with applicants and grant holders. The paper can also be shared directly with applicants and grant holders.

This remainder of this document addresses:

- moving projects online
- digital exclusion and inclusion
- engaging beneficiaries remotely
- safeguarding
- final consideration when delivering online services.

The paper also provides details of other resources addressing remote delivery that have been produced by The Fund.

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[1] The BCF national evaluation undertaken by NPC supported grant holders with service delivery through a programme of guidance, workshops and tailored assistance. The accompanying programme evaluation contributed to the evidence base on loneliness, with the aim of supporting longer-term policy and funding decisions.

[2] The BCF programme was an £11.5m cross-government fund set up in partnership with The Fund and The Co-op Foundation. It was set up in response to the recommendations of the Jo Cox Loneliness Commission, established prior to her death in summer 2016 to shine a spotlight on the millions of people who are living with loneliness. The BCF was part of the Government's wider package to tackle loneliness. £11.5 million was awarded to 126 voluntary, community and social enterprise organisations.

2. Moving projects online

Breaking down the process of adapting to online service delivery can be beneficial. Cast's Ten Digital Design Principles offer some practical first steps including:

- start with users' need and including them in the process
- understand what is already provided to avoid duplication
- ensure inclusivity so that the service is accessible to all your beneficiaries
- collaborate and build partnerships.

The process of developing an online service can also be supported by continually testing, gathering beneficiary feedback and implementing changes through what is learnt.

BCF grant holders shared their learning about moving project online. Key lessons included:

- supporting beneficiaries to increase their engagement with online activities
- putting in place appropriate safeguarding and privacy measures
- offering choices to meet different needs
- ensuring support is consistent and reliable
- working with other local organisations to avoid duplication
- responding to changing beneficiary needs during different lockdowns or social distance requirements.

3. Digital exclusion and inclusion

People can be digitally excluded for a range of reasons: lack of access to equipment, internet access or software; lack of skills or knowledge; and / or a lack of confidence in their ability. A lack of equipment to connect to the internet can be particularly problematic. However, there are organisations supporting people to access the equipment the need to get online. For example, DevicesDotNow is providing people with devices, connectivity and support. Also of consideration is ensuring that services are using the right software in terms of accessibility and limitations. The full NCP report provides further details of this.

A key step is to identify if any of your beneficiaries are likely to experience digital exclusion. The NHS have identified the following groups particularly at risk of digital exclusion:

- older people
- people with lower incomes
- people without a job
- people living in social housing
- people with disabilities
- people with fewer educational qualifications
- people living in rural areas

- people who are homeless
- people whose first language is not English.

The Help through Crisis (HtC) Learning Support and Evaluation (LSE) team have produced a factsheet addressing [digital inclusion.](#)

The Fund's Evaluation and Customer Insight Team have produced a [slide deck](#) to support addressing multiple disadvantage with technology during Covid-19, which also addressed digital inclusion and exclusion.

4. Engaging beneficiaries digitally

To support ensuring your digital service is useful and accessible to beneficiaries, and meets their needs, the service design process will benefit from including beneficiaries as far as possible. This can start with researching beneficiaries' needs to ensure understanding of their contexts, characteristics and challenges. Beneficiaries can then be involved in the design, testing and implementation of the service. As the service continues, it is important to test your service, gather feedback and use these insights to develop and improve the service.

Both [Catalyst](#) and [NPC](#) have suggested ways of engaging remotely with beneficiaries during a crisis. These include:

- use social media to gather general feedback on non-sensitive feedback
- use surveys to gain a general feel for beneficiaries' experiences and preferences
- conduct polls to gain a quick indication of how beneficiaries feel.
- hold in-depth interviews by phone, video or through audio-recording features on platforms such as WhatsApp.

The HtC LSE team have also produced a factsheet to support [effectively engaging people online](#).

Any engagement must consider ethics, General Data Protection Regulation (GDPR) and safeguarding.

4.1 Improving accessibility for beneficiaries

Many of the groups described previously may face challenges getting online and engaging with remote delivery due to accessibility barriers such as anxiety about using the internet, concerns about online safety and a lack of confidence. Accessibility barriers may hinder those for whom English is not their first language and those with disabilities or an impairment.

[3]For people experiencing language barriers, where possible, get instructions for using different technology (eg Zoom) in an individual's first language. There are existing guides for Zoom in a variety of languages. The Online Centres Network delivers training to support people to get online via local training, with a specific focus on those who are socially excluded due to disabilities, unemployment or financial difficulties. AbilityNet works to support people with a disability or impairment to use technology.

4.2 Supporting beneficiaries to grow their online, confidence and skills

Developing online skills is key to building beneficiaries' confidence and increasing their participation in digital services. There are a range of free resources to support teaching basic digital skills:

- practical guidance and information on downloading apps for both iPhone and Android devices
- tutorials and guides on various tools and platforms include: making video calls from different devices; using Facetime, Skype, and WhatsApp; setting up and using webcams; and using Facebook and Facebook Messenger.
- BT's Skills for Tomorrow courses offer content to teach digital skills – from how to use email to coding.

To support people who are not confident in their online abilities, it is important to do the following:

Be patient and ensure those struggling with remote service delivery are rewarded by having positive experiences that increase their confidence.

Be encouraging and allow for the time required to enable people to feel comfortable working remotely.

Wherever possible, provide opportunities for people who have benefited from using online services to share their positive experiences.

BCF grant holders also recommend:

- begin by contacting beneficiaries with a means they are familiar with such as through phone calls
- keeping online activities as simple as possible
- allow time before online sessions to allow for beneficiaries to sign in so technical help can be provided if needed.
- reassure people that technical difficulties are 'normal'
- develop a buddy system to support peer-to-peer learning.

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[3] It should be noted that the examples in this section of the paper are not referenced in the NPC report but are provided as available online.

5. Safeguarding

While safeguarding policies may not need to change substantially for remote delivery, it may be necessary to make adaptations. It is important to check in with staff to ensure they are comfortable with any changes resulting from online delivery and have a clear route for reporting safeguarding concerns.

5.1 Minimising risks associated with delivering online services

The following tips can support minimising risks associated with delivering online services:

1. Consider enabling security features on platforms like Zoom. The risk of hacking can be reduced by setting a password for video calls and enabling a 'waiting room' feature to check who is entering a call before letting them in.
2. Ensure all online conversations are moderated and that staff understand reporting and blocking procedures for any platforms used.
3. Be mindful that platforms such as Whatsapp allow all group members to access phone numbers. Ensure users understand the associated risks before agreeing to use a specific platform and that they know how to leave a group or block users if required.
4. Ensure reporting procedures are in place in case of a security breach that might compromise service users' information. To prevent a security breach, it is important to make as secure as possible any online systems used to collect or store confidential information. This can be supported by using two-factor authentication for staff to log in.
5. As with in-person delivery, keep data sharing to a minimum, only store essential information and use a secure system. Beneficiaries should also be made aware of, and consent to, any collection of personal or sensitive data.
6. Creating a risk assessment can be a useful way to identify and manage any risks associated with delivering online service.

5.2 Protecting children, young people and other vulnerable young people

Much of that considered with working with vulnerable groups through online delivery is similar to in-person delivery. However, it may be necessary to make some adaptations:

It may be necessary to collect parental consent for children and young people in an online format. Online tools such as Yotisign can be used to collect electronic signatures.

Ensure staff and volunteers recognise the signs of online abuse or harm. In relation to abuse of children, The NSPCC provide information and advice relating to types and signs of online abuse and what to do if a child discloses online abuse.

Check the age-restrictions and appropriateness of platforms being used with children (and other beneficiaries). For example, Facebook can only be used with children aged 13 and above.

Staff should use work accounts, rather than personal accounts, to communicate with beneficiaries. For example, rather than using personal Facebook accounts, an organisational Facebook account should be created for communication with beneficiaries.

6. Final considerations when running online sessions

In addition to ensuring safeguarding concerns are addressed, there are some additional steps that are important for staff and volunteers to consider when delivering online session.

1. Identify and oversee who has administrative roles on different platforms. Ensure administrative staff have relevant training and support for running an online system.
2. Learn how to use the privacy settings and reporting functions of platforms being used. This will ensure any complaints can be dealt with quickly and safely.
3. Clearly identify any third party staff who have access to online delivery systems and give clear guidance on accessing sensitive information.
4. Develop a clear process for monitoring who is accessing the system, tracking attendance and overseeing user activity. If appropriate, this provides a record of activity if a safeguarding concern is disclosed alongside keeping a record of scheduled and completed online sessions.
5. Maintain professional boundaries by ensuring staff and volunteers use a neutral background so that no personal items, including photos of family members, or anything else identifies where they live.
6. When live streaming, have a second member of staff act as a moderator to remove challenge comments.
7. To support beneficiaries' confidentiality, consider that some beneficiaries may be using shared devices with other members of their household and / or may not want to be overheard. Ask beneficiaries how they would like to be contacted and when.
8. Establish ground rules for features such as sharing screens, file sharing and webcams. Ensure there is explicit consent to use these features before starting a session.
9. Agree behavioural standards with beneficiaries and hold everyone – including staff and volunteers - to these standards.