

Vulnerable Supporters Policy and Guidance

Why this policy?

This policy is to ensure that our fundraising is carried out fairly and in a way that is ethically responsible. We give examples that indicate vulnerability so those working for and on behalf of the Boaz Trust (Boaz) can identify a vulnerable supporter and respond in a way that is most appropriate.

Who is it for?

It is applicable to all staff, volunteers, trustees and anyone acting on behalf of Boaz.

The rules - the Fundraising Code of Practise

We abide by the Code which states:

*e) i) Fundraisers **MUST** take all reasonable steps to treat a donor fairly, enabling them to make an informed decision about any donation. This **MUST** include taking into account the needs of any potential donor who may be in a vulnerable circumstance or require additional care and support to make an informed decision.*

*ii) Fundraisers **MUST NOT** exploit the credulity, lack of knowledge, apparent need for care and support or vulnerable circumstance of any donor at any point in time.*

*iii) If a fundraiser knows or has reasonable grounds for believing that an individual lacks capacity to make a decision to donate, a donation **MUST NOT** be taken.*

*iv) A donation given by someone who lacked capacity at the time of donating **MUST** be returned.*

There is more information available about responding to the needs of people in vulnerable circumstances and helping donors to make informed decisions in our ['Treating Donors Fairly' Guidance](#).

How do we class a supporter as vulnerable?

We consider a supporter vulnerable if they find it difficult to make an informed decision about the choices offered to them. This can be as a result of a temporary or permanent condition. A number of factors can contribute to vulnerability and the following may indicate that a person is vulnerable.

These include a person;

- with cognitive impairment, including dementia and mental health problems
- with a significant and impairing physical or sensory disability
- with a learning disability
- with a severe physical illness
- who is homeless
- who is particularly frail
- experiencing financial difficulties
- who is experiencing a time of stress or anxiety, e.g. bereavement, unemployment, family break up
- who is an unpaid carer who is overburdened, under severe stress or isolated
- with a severely reduced understanding of English
- under the influence of drugs or alcohol
- who finds the subject matter of the contact distressing.

How do we identify a Vulnerable Person?

There are a number of indicators that can help make this identification when speaking with a person on the phone or face to face. The person may:

- ask for questions or information to be repeated
- ask us to speak more slowly
- take a long time to respond, find it difficult to respond or respond in an inappropriate manner
- ask several times who the caller is
- be unable to hear or understand what is being said
- ask irrelevant or unrelated questions
- wander off the subject
- respond in an irrational way to simple points
- become upset
- have forgotten that they have given a donation or claim no knowledge of Boaz
- mistake the caller for someone else
- repeat questions they have already asked
- display signs of forgetfulness
- be unable to read or understand the information provided to them
- explain that someone else deals with their finances or personal matters
- display signs of ill health, e.g. breathlessness or discomfort.

Sometimes we may be informed of vulnerability through written communication:

- A supporter may email or write to indicate they are permanently vulnerable
- A supporter's family member or carer may indicate they are vulnerable
- Shaky or hard to read writing may be evident.

How do we deal with vulnerability?

We use our best judgement where we have grounds to believe that a supporter is vulnerable to ensure we communicate with them in a way that meets their needs.

We may respond in the following appropriate ways:

- Being patient and not rushing the conversation. A longer call is better than a short one which leaves the supporter confused or agitated
- Asking if the individual would prefer another method of communication
- Asking if they need to speak to anyone else or need more time in order to make a decision. We aim to ensure a supporter is fully informed and supported to make a decision that is right for them.
- Checking their understanding of what they have agreed to. It may be appropriate to repeat back what they have agreed to and we may offer to write or email them to confirm what they have decided.
- Decide that it is inappropriate to continue with the conversation, aiming to end the interaction in a positive and pleasant manner.

Additional points

- Boaz does not identify vulnerable supporters based on age, disability or any other social indicator, but deals with each person on a case-by-case basis. We try to ensure every supporter is given the appropriate information so they can make an informed decision about giving.
- Should Boaz receive information about a supporter's vulnerability from a third party, we may not act on any request to alter the supporter's preferences unless the third party can provide evidence that he or she has the authority to act on behalf of the supporter.
- When we have been given information about, or identified a vulnerable person, we act upon this and ascertain what kind of communication, if any, is acceptable. Our database is then updated to reflect this information.
- If a supporter is identified as being under the age of 16, then we will remove them from fundraising appeals and they are not to be approached to donate.

Effective date: This policy is effective from: 1 March 2017

Review date: This policy is due for review: 1 March 2023