



## Quakers in Britain

### Vulnerable supporters' policy

#### *Treating donors fairly*

The Charities (Protection and Social Investment) Act 2016 introduced new legislative requirements for charities to protect the vulnerable and to ensure that any fundraising on their behalf maintain the same high standards.

Giving to Britain Yearly Meeting (BYM) should be a positive experience for all of our existing or potential donors. We recognise that inevitably a few of the many people we engage with through our fundraising activities may be classed as temporarily or permanently vulnerable and that we should be especially compassionate and respectful when engaging with them.

To ensure that we are following the best practice in our interaction with supporters, we encourage our fundraisers to regularly review The Fundraising Regulator's Code of Fundraising Practice (<https://www.fundraisingregulator.org.uk/code>), which includes some specific rules and standards relating to fundraising with people in vulnerable circumstances.

In BYM, we do not cold call supporters or do direct marketing. Instead, we encourage Friends to support us through regular 'ask' in our weekly e-newsletter Quake!, through half-yearly inserts in the Friend magazine, and through other means such as advertising in the Friend magazine. We will send a thank you email or letter to everyone who donates to us. Supporters who give annually will receive an annual update via email. All donors can opt out of these regular communications. Locally, treasurers, collectors or other role holders will ask for contributions for local and area meetings and also BYM. This is sometimes called 'the schedule' and it is a long-held tradition of how Quakers can support the Society of Friends at the local, area and national level.

#### How do we define a vulnerable supporter?

We define a 'vulnerable supporter' as an individual that lacks the capacity to understand or make an informed decision about making a donation, or may be experiencing a situation whereby they are prone to increased vulnerability and may require additional support from others before making a decision to donate. Such individuals may be experiencing all or none of the following:

- A medical condition such as dementia
- Financial hardship such as redundancy (where a gift from a donor may affect their ability to sufficiently care for themselves or leave them in financial hardship)

- A recent bereavement
- A long-term or temporary mental health condition such as severe anxiety or learning difficulties

All individuals may, at some stage in their life, be considered vulnerable or require additional care and support. We recognise that an individual who may need additional care and support, or may be considered to be in a vulnerable circumstance, can still have capacity to choose to donate to us. Instead, it is the context and circumstance that they may be in at the time of making a decision about whether to donate that is relevant.

**Examples:** A recently bereaved person may need additional support, but this may change as time progresses. At the time of bereavement they could still have the capacity to make a donation, but might need additional support to help them make their decision. Additional support may include: delaying acceptance of the gift to give the donor further time to consider their donation; including a 'cooling off' period if the donor changes his or her mind; or suggesting the donor gets advice from family/friends.

An elderly person who may receive more approaches for funds than others do, might feel overwhelmed and confused, and that this itself can create greater sensitivity and/or vulnerability. Individual must not be put under undue pressure to donate and when thinking through campaigns and communications. While responding to such a donor it is good to be upfront, tell them why we are communicating with them and check they are happy to continue. Additional support may include asking if they would like to talk to anybody else before making a decision or to have someone else present with them while making a decision, checking their understanding at relevant parts of the interaction and asking if there is anything that needs further explanation.

### Potential indicators of vulnerability

We acknowledge that vulnerability can be difficult to recognise and that it can change over time. We do not identify vulnerable supporters based on specific personal characteristics like age or disability but instead identify vulnerability on a case-by-case basis. As it is not possible to formulate a comprehensive list of all indicators of vulnerability, and as these indicators will differ from person to person, we instead take a precautionary approach and use our best judgment, while approaching our donors.

### Telephone and face-to-face communications

Indicators in a conversation that an individual may be vulnerable include:

- Confusion – the individual may be asking irrelevant questions, making irrelevant statements, display signs of forgetfulness or responding to questions when it is clear that they have not understood what has been discussed
- Repetition – the individual is clearly unable to retain information that has already been given as they keep repeating questions that they have previously asked

- Explicit statements – the individual explicitly states that they feel vulnerable, indicates that they are financially vulnerable and a donation would create financial hardship, or states that a relative or trusted friend attends to their donations and financial matters

**Example:** As a treasurer or collector, you are speaking to a Friend or attender after MfW. They want to know more about giving a contribution towards the work of Area Meeting but they repeat the same questions and seem confused about your answer. This could indicate that this is a vulnerable individual. Ways you could approach this could include: gently encourage the Friend to consider giving at a later time, suggest that they talk to their family before making their contribution, speak in confidence to an overseer or elder about the situation.

### **Written communication**

In some cases, we may be able to identify vulnerable supporters through written communications such as:

- When a supporter has emailed or written to tell us that they are vulnerable
- When a supporter's family member, carer or close friend has indicated that they are vulnerable
- Through incomprehensible handwriting or text which indicates that a supporter does not have full capacity

**Example:** As a treasurer or collector, a Friend contacts you via email. The email is quite difficult to understand and the text suggests that they might not have full capacity to donate. Before providing any information, you might suggest a different way of communication i.e. a telephone conversation or face to face meeting, when being mindful about potential signs of vulnerability, you can assess more accurately if the individual has capacity to donate and if not what support could be put in place. You might suggest to an individual bringing a trusted friend or a family member with them.

### **Family members, carers and friends**

We may be contacted by a family member, carer or close friend to inform us that a current supporter is temporarily or permanently vulnerable. Where we have been given this information we act upon it, asking what kinds of communication, or frequency of communication, if any at all, is appropriate.

### **Refusing or returning donations given by vulnerable supporters**

We will always carefully consider a decision to refuse or to return a donation.

If we have reasonable grounds for believing that the donor lacks the capacity to make a decision then we will not take a donation.

Despite our efforts to protect vulnerable donors and to ensure we engage with them appropriately, there may be the rare occasion where we have received a donation and there are concerns about the donor's mental capacity to have made the donation. In these circumstances we would return the donation to the individual as we will not accept donations unless we are satisfied that the individual was able to understand the consequences of making the donation.

## Ending the conversation or interaction

If we believe that, an individual may be in a vulnerable circumstance or unable to make an informed decision, then we will end that interaction. We will always take care in order not to cause offence or upset the individual for example, we will politely explain that we are ending the interaction by saying, “I’ve taken up enough of your time today, thanks for listening”, or “Maybe you might want some more time to consider whether you’d like to support us.” In some cases, it may be necessary for us to take the donation details and then re-assess the case within the fundraising team to decide any further action, such as confirming the donation again with the donor.

## Communication preferences and GDPR

We are aware of our responsibilities under the Data Protection Act 2018 (DPA)– particularly where the information we are recording is ‘sensitive personal data’ – including any details of views or opinions about a person’s physical or mental health conditions.

We treat data relating to living individuals fairly and lawfully. We are also aware of our obligation as a charity to tell people that we are holding their personal data and to explain of the purpose(s) for which we are holding it.

We will update our records to reflect the wishes of an individual, another person contacting us on their behalf, or on our fundraisers’ observation. Where we have been informed about a relevant condition or where we believe there is a significant risk that a supporter may be vulnerable, we will put in place measures to ensure that donations are not solicited from them in the future. For individuals who are temporarily vulnerable we may choose to halt communications temporarily, but recognise that the person may wish to have contact with us in the future. If appropriate, we may ask the supporter when they would like us to resume future communications. We will not record sensitive information about a supporter’s vulnerability unless they have explicitly given us permission to do so.