

## **Animal Equality**

### **POLICY FOR FUNDRAISING AND RESPONDING TO PEOPLE IN VULNERABLE CIRCUMSTANCES OR LACKING CAPACITY**

#### **Policy Statement**

Giving to your favourite causes should be a positive experience for all, whether an existing donor or potential new supporter. We recognise that some of the many people that we engage with through our fundraising activity will not always have the capacity, at the point of the interaction, to fully understand the nature of the donation they are being asked to give, or the consequences of making that donation. We also understand that people in vulnerable circumstances may need further support before making a decision about whether to make a donation.

Whenever we suspect that someone we engage with is lacking capacity or is in vulnerable circumstances, we will take steps to terminate the contact in a way which seeks to protect that person, while also protecting their dignity and any desire they have expressed to support Animal Equality. We recognise that everyone has the right to support their favourite causes and charities, but we also recognise that we have an obligation to protect those in vulnerable circumstances.

Animal Equality does not engage with some fundraising activities (such as telephone fundraising or door to door fundraising) which can create higher risks in balancing the right to give and the need to protect.

#### **Sector Guidance**

The Institute of Fundraising's Code of Fundraising practice states that:

- 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.
- 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.

We recognise that it may be difficult in some situations for fundraisers to make a clear cut decision as to whether or not someone is in a vulnerable circumstance or lacks capacity. The person is likely to be a stranger to the fundraiser; the interaction can be short-lived and may not be in person. Animal Equality will provide guidelines for fundraisers, but our approach is always to err on the side of caution.

Our approach has been informed by the Institute of Fundraising document:  
Treating Donors Fairly - Guidance for fundraisers responding to the needs of people in vulnerable circumstances and helping donors make informed decisions  
<http://www.institute-of-fundraising.org.uk/library/treatingdonorsfairly/>

#### **Returning donations made by vulnerable people**

Despite our efforts to protect those in vulnerable circumstances, Animal Equality may receive a donation where there may be a question over the donor's mental capacity to make that donation. In this circumstance, Animal Equality may return the donation to the donor or under certain circumstances to a family member or designated person. Animal Equality will

need to be satisfied that at the time the donation was made the donor was unable to understand the consequences of making the donation.

An example would be where a donor is suffering from Alzheimer's and makes a donation to Animal Equality without understanding the financial impact of their decision.

If you would like more information about this please contact [info@animalequality.net](mailto:info@animalequality.net) or by telephone on 020 7993 5348.

We will not return a donation where the donor simply made a bad decision and was not in a vulnerable circumstance.

## **Staff Training**

It is important to be able to identify a vulnerable donor over the phone, in person, as well as on paper as the person may need help and/or support to be able to make a decision.

Examples of indicators which could mean that an individual is in a vulnerable circumstance or needs additional support could include:

- Physical and mental medical conditions • Disability • Learning difficulties • Times of stress or anxiety (e.g., bereavement, redundancy) • Financial vulnerability (where a gift from a donor may impact on their ability to sufficiently care for themselves or leave them in financial hardship) • English not being the donor's first language • Influence of alcohol or drugs.

Checklist to help identify signs that an individual may be in a vulnerable circumstance.

Is the individual:

- Asking irrelevant and unrelated questions, or displaying signs of forgetfulness?
- Unable to read and understand the information they are provided with, and asking for it to be continually repeated?
- Responding in an irrational way to simple questions?
- Saying 'yes' or 'no' at times that it is clear they haven't understood?
- Taking a long time or displaying difficulty in responding to simple questions or requests for information?
- Repeating simple questions such as 'who are you', 'what charity is it' and 'what do you want'?
- Wandering off the subject at hand and making incongruous statements?
- Saying that they are not well or not in the mood to continue?
- Displaying signs of ill-health like breathlessness or making signs of exasperation or discontent?
- Giving a statement such as 'I don't usually do things like this, my husband/wife/son/daughter takes care of it for me'?
- Indicating in any way that they are feeling rushed, flustered, or experiencing a stressful situation?
- Having trouble remembering relevant information, for example that they are already a regular donor to that charity or have recently donated?
- Donating an unexpectedly large gift with no prior relationship? (There being no prior relationship before a gift is made does not on its own constitute 'vulnerability': many legacy and major donor gifts to charities are given without the existence of a relationship between the donor or charity).

Staff are aware of the "Treating Donors Fairly" publication, and use it as a source of further information on dealing with vulnerable people.

## **Updating Records**

Animal Equality will update their records accordingly, in accordance with the Data Protection Act.

A donor or supporter identified as vulnerable should be flagged on the database, along with a brief description of the cause for concern. A block on future mailings may be appropriate.

Flagging a donor as vulnerable should not automatically trigger an end to correspondence with the individual, nor should it mean that future donations will automatically be rejected. It is a mechanism by which we can ensure that we are aware of, and responsive to, events or patterns in donors' behaviour which give cause for concern. Such concerns will be reviewed regularly on a case by case basis and allow us to make an informed decision, where necessary, to stop soliciting/accepting donations from vulnerable individuals in the future.

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