



Vulnerable Supporter Policy

PSPA recognises that inevitably a few of the many people we engage with through our fundraising activities may be classed as vulnerable and that we should be especially compassionate and respectful when engaging with these individuals. PSPA staff 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 requires additional care and support to make an informed decision.

Definition of a Vulnerable Supporter

PSPA defines a 'vulnerable supporter' as an individual who lacks the capacity to understand or make an informed decision about making a donation. The person 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. A vulnerable supporter may experience all or none of the following:

- A diagnosed condition such as dementia
- Times of stress or anxiety (e.g. bereavement, redundancy)
- An undiagnosed or temporary mental health condition such as severe anxiety
- Learning difficulties
- Financial vulnerability (where a gift from a supporter may impact on their ability to sufficiently care for themselves or leave them in financial hardship)
- English not being the supporter's first language
- Influence of alcohol or drugs.

Identifying a Vulnerable Supporter

Vulnerability can be difficult to recognise and it can also change over time. Identifying vulnerable supporters is not based on specific personal characteristics like age but instead is on a case by case basis. It is not possible to formulate a comprehensive list of all indicators of vulnerability as this will differ from person to person but the following checklist can be used as a guide. Is the individual:

- Asking irrelevant or unrelated questions or displaying signs of forgetfulness
- Unable to read or 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 have not 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 and making unrelated statements
- Saying they are not well or are not able to continue
- Displaying signs of ill-health like breathlessness or making signs of exasperation or discontent
- Giving a statement such as “I don’t normally do things like this, my husband/wife/son/daughter normally takes care of it for me”
- Indicating in any way that they are feeling rushed, flustered or are experiencing a stressful situation
- Having trouble remembering relevant information such as that they are already a donor or have recently donated
- Donating an unexpectedly large gift with no prior relationship
- Explains that there is a language barrier and they don’t understand
- Explicitly stating that they feel vulnerable
- Talking about personal issues and asking for advice.

In some instances PSPA may have been contacted by the supporter or a family member/carer to tell us that they are vulnerable or may have received written communications that might be incomprehensible indicating that the supporter does not have full capacity. If contacted by a third party, PSPA must be satisfied that the third party making the request is entitled to act on behalf of the individual. It is the third party’s responsibility to provide evidence of this entitlement i.e. Lasting Power of Attorney for Property and Financial Affairs. Any action will be confirmed in writing to the supporter directly in case they did not wish the family member/carer to act on their behalf.

If vulnerable circumstances are suspected

If vulnerable circumstances are suspected additional steps will be taken such as:

- Checking and confirming the individual does want, and is able, to make the donation
- Asking if they would like to talk to anybody else before making a decision or suggest “maybe you need some more time to consider whether you’d like to support us?”
- If they are in financial difficulty but still want to support the charity, suggesting other ways of making a difference without putting themselves in financial hardship
- Updating the CRM system with accurate records that reflect the wishes of the individual or another person contacting PSPA on their behalf. We will not record sensitive information about a supporter’s vulnerability unless they have given explicit permission for us to do so
- If a donation has already been received and following investigations there are concerns about the individual’s capacity to have made the donation, it will be returned.

Staff training

Relevant training will be provided to all staff and volunteers involved in fundraising and it is their responsibility to ensure they comply with this policy. Any contracts with third party fundraising organisations will ensure those organisations comply with this policy and the Code of Fundraising Practice. PSPA recognises that it may be difficult for the fundraiser to assess the vulnerability of the supporter even with training. Where a fundraiser is unsure, they must ask their manager for a second opinion and approval to accept the donation.

Complaints

PSPA is committed to maintaining the highest standards of professionalism and working in an open and accountable way. We know, however, that there may be times when we don't meet our own high standards. In this instance a complaint may be made to PSPA and this should be dealt with in accordance with our [Complaint Policy](#).