

## Appendix - 3 People in Vulnerable circumstances - guidance for FR staff

Vulnerability can affect different people in different ways and cover a wide range of situations. Some can be permanent, some temporary, and they can include chronic illness, mental health and neurological conditions, and life events. Examples include autism, schizophrenia, depression, Alzheimer's disease, hearing loss and bereavement. We consider each situation, with reference to the Institute of Fundraising's 'Treating Donors Fairly' guidance notes. <http://www.institute-of-fundraising.org.uk/library/treatingdonorsfairly/>

Through awareness of the wide range of potentially vulnerable situations, we are better able to identify where a supporter may not have **the capacity to make an informed decision**. This may be due to a mental health condition or life event, and could be temporary, permanent or fluctuating.

### Potentially vulnerable situations:

- Physical and mental medical condition
- 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

### Identifying if individuals in these situations allows us to take appropriate action, including:

- Politely declining the donation
- Offering a refund if the donation has already been made (refer to the Head of Supporter Care for authorisation)
- Ensuring we do not contact the supporter in the future (RE record and preferences to be updated accordingly)
- Potentially signposting to other teams, possibly to MND Connect or organisations for support with their situation

### When talking to supporters: 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).

**How to support a potentially vulnerable individual during a conversation:**

- Talk clearly, avoiding words and phrases that may be hard to understand (but avoid shouting - raise voice politely for hard of hearing)
- Repeat information
- Try to reflect the terminology used by the donor which may help to increase their understanding
- Be patient and do not rush the individual
- Provide alternative formats of fundraising materials (different language, accessible formats)
- Be upfront and tell the person why you are communicating with them and check they are happy to continue
- Ask if they would prefer to be contacted in a different way (email, letter) or at a different time
- Ask if they would like to talk to anybody else before making a decision
- Check their understanding at relevant parts of the interaction and ask if there is anything that needs further explanation

If you are **happy the supporter has made an informed decision to donate, but may be having help with their affairs**, ensure a thank-you letter is sent so friends and family monitoring their post will be aware. This is a good back-up just in case there is a potentially vulnerable situation.

For further support please contact the Head of Supporter Care, Shabz Khokhar on 01604 611830 or [shabz.khokhar@mndassociation.org](mailto:shabz.khokhar@mndassociation.org)