



BHF Vulnerable Supporters Policy

This policy covers BHF'S commitment to fair treatment of adult supporters that demonstrate vulnerable circumstances. It is applicable to all staff, volunteers, trustees and anyone acting on behalf of BHF.

Why this policy is important

It's important to have a vulnerable adults policy to ensure that all BHF fundraising is conducted in a fair and ethically responsible way. This policy will also detail what BHF considers to be indications of vulnerability with the aim that in practice those acting on behalf of BHF can easily recognise vulnerability and respond to it in a way that is best for the supporter.

Definitions

Vulnerable Supporter¹ – an individual that finds it difficult to immediately make an informed decision about the choices offered to them. A vulnerable supporter may experience all or none of the following:

- a diagnosed condition such as dementia
- a recent bereavement
- an undiagnosed or temporary mental health condition such as severe anxiety
- learning difficulties
- difficulty understanding the language

Direct Marketing Association – The Direct Marketing Association (the UK's trade organisation focusing on advancing all aspects of direct marketing).

Institute of Fundraising - The Professional Membership Body for UK fundraising.

What the policy involves

BHF is compassionate towards its supporters and will never exploit vulnerability. It will do everything it can in order to assist its supporters to make an informed decision about the support they choose to give to BHF.

BHF follows the Institute of Fundraising's Code of Fundraising Practice and when dealing with supporters via telephone it follows guidance provided by the Direct Marketing Association, specifically:

1. **BHF only works with telephone fundraising agencies that agree to follow the DMA's Guidelines for call centres dealing with vulnerable consumers (August 2015).**
2. **BHF allows supporters or those acting on behalf of the supporter to declare vulnerability through the use of a statement providing details of the vulnerability.**
3. **BHF will not contact supporters with the aim of asking for an increase in giving where the supporter's records include a declaration of vulnerability.**

¹ Definition broadly taken from the DMA's White paper entitled '*Guidelines for call centres dealing with vulnerable consumers*' Published by The Contact Centres & Telemarketing Council Second Edition, August 2015

4. **Regardless of if a declaration has been made or not, BHF does not accept donations where it has reason to believe that the donor may be experiencing vulnerable circumstances and accepting the donation would be ethically wrong and/or harmful to the donor.**
5. **Should a situation arise where BHF becomes aware that it has unknowingly accepted donations from an individual during a time that he or she was experiencing vulnerable circumstances, it will endeavour to return all donations accepted during this period.**
6. **Should BHF receive information regarding a supporter's vulnerability from a third party, it will 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.**

If BHF becomes aware of a situation where a third party agency acting on its behalf has not acted in accordance with this policy, it may stop working with the agency or ask that individual fundraisers responsible for non-compliance with this policy be removed from BHF campaigns.

How to comply

BHF does not identify vulnerable adults based on disability or age or any other social indicator, it deals with each donor on a case-by-case scenario. BHF seeks to ensure that a donor is equipped with the appropriate information in order to make an informed decision about giving to it. It recognises that in some circumstances it may be necessary to adapt the way in which it communicates with the donor i.e. using braille or a translation service. The need to adapt the way in which BHF communicates with a donor does not necessarily indicate vulnerability.

It is important that each fundraiser, when interacting with a donor, considers all interactions to determine whether or not they should be considered a vulnerable adult. Indicators of vulnerability could be bereavement, illiteracy, illness, disability or other impairment. Fundraisers must always use their best judgment when they have grounds to believe that a donor is vulnerable before making a final decision. The following examples may help identify vulnerable supporters:

- a. Request for repetition or to speak more slowly
- b. Evidence of being confused i.e. replying 'yes' to a question that requires a more detailed answer, going off tangent and talking about irrelevancies
- c. Repeating themselves
- d. Becoming upset during the call
- e. Taking a long time to answer the phone and sounding out of breath
- f. Explaining that a relative/friend deals with their finances/personal matters
- g. Explains that there is a language barrier and they don't understand
- h. Saying that they have no knowledge of BHF or any donation they have given
- i. Asking who the caller is several times
- j. Mistaking the caller for someone else, despite being told the call is from BHF
- k. Talking about personal issues and asking for advice
- l. Explicitly stating that they feel vulnerable

Attention should also be paid to anything that the supporter has failed to mention i.e. they fail to ask how much the donation is for or how it will be collected before agreeing to it.

The above cannot be taken as a definitive list but if a supporter exhibits any of the above behaviour, BHF expects fundraisers to ask the supporter to repeat the details of their agreed gift so that the fundraiser can assess whether the supporter has understood clearly the gift that they will be agreeing to. Fundraisers must also seriously consider the following:

- Whether the supporter is able to understand the discussion that you've been having
- Whether they are able to make a decision based on your conversation
- Whether they know all of the facts necessary in order to make a decision
- Whether they are able to communicate their decision regarding a donation

BHF recognises that it may be difficult for the fundraiser to assess the vulnerability of the supporter. Where a fundraiser is unsure, they must ask their manager for a second opinion and approval to accept the donation.

If you believe you have interacted with a vulnerable supporter and you are concerned about their welfare, you must follow BHF's Safeguarding Policy.