



British Heart
Foundation

Vulnerable Supporters Policy

This policy covers the British Heart Foundation's (BHF) commitment to all its existing donors or potential new supporters lacking capacity or in vulnerable circumstances and applies to all of our fundraising approaches and commercial activities. It is applicable to all staff, volunteers, trustees and any third parties acting on behalf of BHF.

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Vulnerable Supporters Policy

1. INTRODUCTION

- 1.1 The British Heart Foundation (BHF) believes that any interaction with the charity should be a positive experience for all of our existing donors or potential new supporters and we are committed to delivering our fundraising approaches and commercial activities in an honest and transparent way.
- 1.2 The BHF is completely reliant on the goodwill and generosity of our supporters to fund our life saving heart research and every donation of funds, time or goods we receive helps beat heartbreak forever. Therefore, it is vital that the relationship we build with our supporters and potential supporters is a positive and well balanced one; this is particularly so for vulnerable people.

2. PURPOSE

- 2.1 This policy demonstrates the BHF's commitment to the fair treatment of all its existing donors or potential new supporters lacking capacity or in vulnerable circumstances. The BHF will abide with the requirements set out in the Code of Fundraising Practice and the Charities (Protection and Social Investment) Act 2016 on vulnerable people. We will also abide by other legislation that relates to our commercial activities such as the Consumer Rights Act 2015 and the Street and House to House Collections Act 1962. We are also committed to our Supporter Promise.
- 2.2 This policy aims to assist any BHF staff member, trustee, volunteer and third party acting on our behalf during fundraising approaches or commercial activities. We will also ensure that vulnerable people are treated fairly and with compassion and integrity.

3. POLICY STATEMENT

- 3.1 The BHF will always abide by the Code of Fundraising Practice on Vulnerable People. In particular the Code states:

"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; and

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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.”

- 3.2 We are compassionate towards our supporters and potential supporters, sensitive to individual situations and we will never exploit their vulnerability. We will do everything we can to assist supporters in making an informed decision about the support they choose to give us.

4. DEFINITIONS

For the purpose of this policy, the following terms have been used in its broadest sense:

- 4.1 Vulnerable Supporter / Donor and Supporter / Donor in a Vulnerable Situation¹²: This includes anyone who is donating their funds, their time or their possessions in order to support the BHF.
- An individual that finds it difficult to make an informed decision such as the decision to make a donation.
 - An individual who, due to the nature of their vulnerability, may be caused increased stress or anxiety when interacting with a BHF employee or volunteer.
 - An Individual whose vulnerability may be temporary, meaning they are in a vulnerable situation.
 - 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; or
 - difficulty understanding the language
 - intoxication through drugs or alcohol
- 4.2 **Direct Marketing Association (DMA)**: The UK’s trade organisation focusing on advancing all aspects of direct marketing.
- 4.3 **Institute of Fundraising (IOF)**: The professional membership body for UK fundraising, which the BHF is a member of.
- 4.4 **The Gambling Commission (GC)**: The Government Agency responsible for regulating gambling and supervising gaming law in Great Britain.

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

² Information taken from the IOF’s Treating Donors Fairly 2016 guidance, November 2016

- 4.5 The Fundraising Regulator (FR): The independent regulator of charitable fundraising in England and Wales.

5. SCOPE

- 5.1 This policy applies to all members of the BHF working under permanent, fixed term or other temporary contracts of employment, consultants, contractors, secondees, volunteers and/or stakeholders who undertake business on behalf of, or representing the BH across all directorates.

6. KEY RESPONSIBILITIES

- 6.1 All BHF staff members and volunteers are responsible for:
- Demonstrating the BHF values when engaging with supporters including our Supporter Promise; and
 - Complying with this policy

7. ADOPTED GUIDELINES

- 7.1 We have adopted the guidelines set out in:
- The IOF's guidance document on "Treating Donors Fairly". This document is a specific set of guidance for fundraisers responding to the needs of people in vulnerable circumstances and helping donors make informed decisions; and
 - The DMA's White Paper "Guidelines for call centres dealing with vulnerable consumers"
 - The Gambling Commission's Principles for Licensing and Regulation, specifically protecting children and other vulnerable persons from being harmed or exploited by gambling as covered in Section 1 of the Gambling Act 2005.
- 7.2 The BHF only works with telephone fundraising agencies that agree to follow the DMA's Guidelines for call centres dealing with vulnerable consumers (August 2015).
- 7.3 Doorstep Face to Face fundraisers who represent the BHF will not -
- Approach households that display a door sticker stating 'no charities', 'no fundraising' or words that clearly indicate charity fundraising is not welcome.
 - Approach households that display a door sticker stating 'No Cold Calling' or words to that effect.
 - Buildings clearly signposted as Sheltered Accommodation, retirement or supported residence.

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- Fundraise in areas that are clearly signposted as being legitimate ‘Cold calling Control Zones’ set up according to Trading Standards guidelines.

- 7.4 The 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.
- 7.5 The BHF does not accept donations of monies or goods 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.
- 7.6. Should a situation arise where the BHF becomes aware that it has unknowingly accepted donations of monies or goods 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.
- 7.7. Should the BHF receive information regarding a supporter’s vulnerability from a third party such as a relation or carer, it will request evidence that he or she has the authority to act on behalf of the supporter.
- 7.8 If the BHF becomes aware of a situation where a third party agency or contractor acting on its behalf has not acted in accordance with this policy, it may stop working with the agency or contractor or ask that the individuals responsible for non-compliance with this policy be removed from BHF campaigns or activities.
- 7.9 We have implemented in our written contracts with external agencies and professional fundraisers the legislative requirements, (As set out in the Charities (Protection and Social Investment) Act 2016), to protect vulnerable people and to ensure that any third parties fundraising on our behalf maintain the same high standards.
- 7.10 Should a supporter declare that they are self-excluded from gambling approaches through the Gambling Commission, we will endeavour to suppress their address from such further approaches.

8. INDICATORS OF A VULNERABLE SUPPORTERS AND DONORS

- 8.1 The BHF always seeks to ensure that a donor or potential donor is equipped with the appropriate information in order to make an informed decision about giving.

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- 8.2 The BHF does not discriminate against person due to their age.
- 8.3 The BHF 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 the BHF communicates with a donor does not necessarily mean that the donor is vulnerable.
- 8.4 Each fundraising encounter or commercial interaction is unique. The BHF recognises that it can be very difficult for either our people or third parties to accurately identify all signs of vulnerability, some of which can be subtle. However, while an accurate identification of vulnerability may be difficult, all individuals are required to put the needs of the donor first during any interaction and assess whether they are able to make an informed decision to donate.
- 8.5 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 conversation
 - e. Taking a long time to answer simple questions or a long time to answer a telephone
 - 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 they are talking to several times
 - j. During a telephone interaction, 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 are or feel vulnerable
- 8.6 The BHF expects all fundraisers or other third parties to seek clarification of the potential supporter or donors understanding of any agreement to support or donate if there is any indication that the person may be vulnerable. This will usually be by asking them to repeat the details of any agreed gift, or support of time or goods.

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- 8.7 Fundraisers or other third parties 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 an informed decision based on your conversation;
 - Whether they know all of the facts necessary in order to make a decision; and
 - Whether they are able to communicate their decision regarding a donation
- 8.8 A person who states that they are vulnerable, or where there are indicators of vulnerability which could be due to an experience that is or is related to cardiovascular disease, such as a personal medical condition or bereavement; will be treated respectfully and always be given the opportunity to disengage their conversation about the BHF.