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Responsibility SMT (Principal/Bursar (with input from Development Officer))



DAME ALLAN'S SCHOOLS
REGISTERED CHARITY NUMBER 1084965
DEVELOPMENT OFFICE
POLICY FOR FUNDRAISING COMMUNICATIONS
WITH VULNERABLE SUPPORTERS

1. CONTEXT

This policy responds to the Institute of Fundraising guidance set out in the document called [Treating Donors Fairly: Fundraising with People in Vulnerable Circumstances](#).

These guidelines do not cover children and young people under the age of 18, and the Development Office fundraisers do not actively seek donations from them.

Dame Allan's Schools rely on donations from alumni and other interested individuals and grants from organisations to support the bursary scheme and priority projects for the schools. We aim to communicate with supporters in their chosen method of contact and have a process to allow supporters to change their selected opt-in choices at any time.

Dame Allan's Schools does not identify vulnerable adults based on broad characteristics such as age or disability which might be considered discriminatory.

This document outlines how we take all reasonable care to identify supporters who may be vulnerable, and what action we take if we suspect a person lacks the ability to make an informed decision about making a donation.

2. COMPLIANCE

[The Institute of Fundraising general principles clause 1.2 e\)](#) states

- i) 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.
- ii) 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.

The four key principles of the Institute of Fundraising’s “Treating Donors Fairly” policy are:

- Respect – treating all members of the public respectfully. This means being mindful of, and sensitive to, any particular need that a donor may have. It also means striving to respect the wishes and preferences of the donor, whatever they may be.
- Fairness – all donors should be treated fairly. This includes not discriminating against any group or individual based on their appearance or health conditions.
- Responsive – this means responding appropriately to the individual needs of your donors. The onus should be on the fundraiser to adapt his or her approach (tone, language, communication technique) to suit the needs and requirements of the donor.
- Accountable – it is up to fundraisers and charities to take responsibility for their actions and ensure that their fundraising is carried out in line with the Code of Fundraising Practice. They should consider what processes and procedures they may need to have in place to ensure that this occurs and that the needs of people in vulnerable circumstances are met.

3. IDENTIFYING VULNERABLE PEOPLE

By using the term ‘vulnerable adult’, we mean those people who are lacking the ability, either temporarily or permanently, to make an informed decision about donating money to Dame Allan’s Schools.

Examples of indicators may include:

Mental illness and mental capacity concerns

Physical / sensory disability

Learning difficulties

Financial vulnerability

Times of stress or anxiety

Language barrier

Influence of alcohol or drugs

Information provided by a family member or carer

4. RESPONSE TO SUSPECTED VULNERABILITY

Following the guidance of the Institute of Fundraising:

Dame Allan's Schools will not take a donation if they know or have reasonable grounds for believing that a donor lacks the capacity to make a decision about making a gift.

If following receipt of a donation the Schools receive evidence that the donor lacked the capacity to make the decision to donate, then the Schools must return the donation because the original donation was invalid.

If a donor is found to lack capacity, the Schools will put in place measures to ensure that they do not continue to ask that individual for support.

This policy should be read in conjunction with the Schools' Anti-Money Laundering Policy.