

Stephen Perse

Foundation

Policy on fundraising with and responding to people in vulnerable circumstances

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1. Introduction

- 1.1. Philanthropy should be a positive experience for everyone. Making a gift to the Stephen Perse Foundation (the “**School**”) is an important way that donors can show support for issues and institutions that they care about deeply. Our fundraising activities seek to establish and develop relationships with individuals – both existing donors and potential new supporters – and engage them in delivering a [Stephen Perse education](#) to children and young people in Cambridge and the region, regardless of their home circumstances.
- 1.2. The School recognises that some of the people with whom we engage when fundraising may be in a vulnerable circumstance, or may need additional support to make a decision. This policy sets out guidance for anyone involved in fundraising for the School, whether staff or volunteers. For the purposes of this document, the term ‘fundraiser’ refers to anyone engaged in any form of fundraising activity for the Stephen Perse Foundation and its schools, whether in-house or a third party.

2. Sector Guidance

- 2.1. The Fundraising Regulator’s Code of Fundraising practice states that:
 - 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.
 - Fundraisers **MUST NOT** exploit the credulity, lack of knowledge, apparent need for care and support, or vulnerable circumstance of any donor. The School’s approach is informed by the [Chartered](#) Institute of Fundraising’s [‘Treating Donors Fairly’](#) Guidance.

3. The School’s approach

- 3.1. Fundraisers for the Stephen Perse Foundation and its schools should respond to the needs of each individual donor, which will depend on the nature of the interaction and engagement. In all circumstances, the School expects those fundraising on its behalf to be alert to people who may be in a vulnerable circumstance and to treat those individuals with respect and care.
- 3.2. If the fundraiser has reasonable grounds to believe that a potential supporter lacks the capacity to make a decision, then a solicitation should not be made, nor should a donation be accepted. If, after receiving a donation, the School receives evidence that the supporter lacked capacity to make the decision to donate, then the donation must be returned. The School will follow the guidance from the [Chartered](#) Institute of Fundraising and the Charity Commission in these cases.
- 3.3. If a fundraiser believes that an individual may be in a vulnerable circumstance or unable to make an informed decision, the fundraiser should politely end the interaction in such a way as to not cause distress. When ending the fundraising activity, if there is the opportunity to do so, the fundraiser should check the individual’s preferences as to whether they would like to be contacted again in the future.
- 3.4. If a donor is found to be lacking capacity to make a decision, the School will put into place measures to ensure that donations are not solicited from them in the future. This is likely to involve recording communication preferences in the School’s fundraising and alumni relations database. When recording information, all fundraisers must be aware of their responsibilities under the Data Protection Act. Under no circumstances should fundraisers record any judgement or assessment about what they perceive an individual’s physical or mental condition to be. If an individual voluntarily provides a written or verbal ‘personal declaration’ about their condition or circumstances, then provided that they have consented for the School to hold this data, it can be recorded on the database. In all such circumstances, guidance should be sought from the Compliance Team to confirm our compliance with our data protection obligations.
- 3.5. Sometimes a third party (e.g. a family member) may contact the School on behalf of a donor to communicate a request. For any financial matter, the School must be satisfied that the third party making the request is entitled to act on behalf of the individual. This is usually demonstrated through

a written authority on behalf of the donor, or a power of attorney for the third party to administer the donor's affairs. It is the third party's responsibility to provide evidence of this entitlement. For some requests (for example, around communication preferences), the third party may not have such written authority, but provided that the School is satisfied that the individual is acting in the best interest of the supporter, we will respond to these requests.

4. Related Policies and Procedures

- Gift Acceptance Policy
- Fundraising Complaints Procedure

Version Control

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