

ORDER OF MALTA DIAL-A-JOURNEY TRUST

POLICY FOR FUNDRAISING AND RESPONDING TO PEOPLE IN VULNERABLE CIRCUMSTANCES OR LACKING CAPACITY

Policy Statement

Giving to your favourite causes should be a positive experience for all, whether an existing donor or potential new supporter. Order of Malta Dial-a-Journey Trust recognises that some of the many people that we engage with through our fundraising activity will not always have the capacity, at the point of the interaction, to fully understand the nature of the donation they are being asked to give to Order of Malta Dial-a-Journey Trust, or the consequences of making that donation. Order of Malta Dial-a-Journey Trust also understands that people in vulnerable circumstances may need further support before making a decision about whether to make a donation.

Whenever we suspect that someone we engage with is lacking capacity or is in vulnerable circumstances, we will take steps to terminate the contact in a way which seeks to protect that person while protecting their dignity and any desire they have expressed to support Order of Malta Dial-a-Journey Trust. We recognise that everyone has the right to support their favourite causes and charities but we also recognise that Order of Malta Dial-a-Journey Trust has an obligation to protect those in vulnerable circumstances.

In particular, we recognise that some fundraising activity (such as telephone fundraising or door to door fundraising) can create higher risks in balancing the right to give and the need to protect. In these circumstances, whenever a fundraiser suspects that a person may be vulnerable, our approach is to immediately end the engagement. This should be done politely and without making a request for a donation or any direct enquiries about the individual's capacity to make a decision or the existence of vulnerable circumstances. This approach applies in all fundraising areas whether in-house or through a third party. Order of Malta Dial-a-Journey Trust will provide alternative options for the individual to engage with us once the conversation has ended, thereby upholding the right that everybody has to donate if they are able to do so.

Sector Guidance

The Institute of Fundraising'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 at any point in time.

We recognise that it may be difficult in some situations for fundraisers to make a clear cut decision as to whether or not someone is in a vulnerable circumstance or lacks capacity. The person is likely to be a stranger to the fundraiser; the interaction can be short-lived and may not be in person. Order of Malta Dial-a-Journey Trust GB will provide guidelines for fundraisers but our approach is always to err on the side of caution.

Our approach has been informed by the Institute of Fundraising document:
Treating Donors Fairly - Guidance for fundraisers responding to the needs of people in vulnerable circumstances and helping donors make informed decisions
<http://www.institute-of-fundraising.org.uk/library/treatingdonorsfairly/>

Returning donations made by vulnerable people

Despite our efforts to protect those in vulnerable circumstances, Order of Malta Dial-a-Journey Trust may receive a donation where there may be a question over the donor's mental capacity to make that donation. In this circumstance, Order of Malta Dial-a-Journey Trust may return the donation to the donor or under certain circumstances to a family member or designated person. Order of Malta Dial-a-Journey Trust will need to be satisfied that at the time the donation was made, the donor was unable to understand the consequences of making the donation. An example would be where a donor is suffering from Alzheimer's and makes a donation to Order of Malta Dial-a-Journey Trust without understanding the financial impact of their decision.

If you would like more information about this policy or to request the return of a donation please contact Order of Malta Dial-a-Journey Trust GB via email fundraising@dial-a-journey.org or call 01786 465355 write to Fundraising Dept., Order of Malta Dial-a-Journey Trust, 17 Munro Road STIRLING FK7 7UU

Order of Malta Dial-a-Journey Trust will not return a donation where the donor simply made a bad decision and was not in a vulnerable circumstance. Where it is felt a case for an exceptional "ex-gratia" payment might exist, again please contact Order of Malta Dial-a-Journey Trust using the details above. Such payments may require the consent of the Office of the Scottish Charity Regulators they can be made.

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