



Southland Foundation Donors in Vulnerable Circumstances Policy

Southland Foundation's fundraising practices should be consistent with the values of the Foundation and should always treat donors and potential donors fairly and respectfully.

People in vulnerable circumstances

Southland Foundation should be mindful of vulnerable people who may not have the capacity to make confident and informed decisions about donating. It is important to ensure that fundraising practices do not exploit or target such individuals. People may be considered vulnerable if their circumstances mean their capacity to decide is reduced. Vulnerability can be permanent or temporary and can vary greatly from person to person.

Common examples of people in vulnerable circumstances can include people:

- With intellectual disabilities that affect comprehension or understanding.
- With physical or mental health issues (permanent or temporary).
- Who do not fully understand the language the fundraiser is speaking.
- Who are experiencing financial difficulty.
- Who are experiencing stress or anxiety (including that induced by a request for a donation).
- Who may be under the influence of drugs or alcohol.
- Who are unable to care for themselves (especially those who rely on the support or care of a charity).
- Who are elderly (especially those without close support).

People's ability to make a donation decision can be influenced by their unique circumstances, but even those in vulnerable situations can make informed decisions with proper care and support. Having the capacity to donate either on their own, or with advice, means fully understanding the information presented, considering its consequences, and clearly communicating one's decision.

Identifying people in vulnerable circumstances.

Understandably, it can be difficult to detect vulnerability when asking people to donate to charity, particularly when the interaction is not face-to-face.

Individual capacity to make a decision depends on a range of factors and some are more obvious than others. However, Southland Foundation personnel should be aware of some of the common signs of vulnerability, and act with considerable care when interacting with people who may be in vulnerable circumstances.

Common signs that a person may be in a vulnerable circumstance may include:

- A lack of comprehension of what is being said.
- Continually asking for statements or questions to be repeated.
- Making statements that indicate others look after their affairs (for example, “my son/daughter normally looks after these matters for me”).
- Responses that indicate the person does not fully understand the language being spoken.
- Any expressions of being uncomfortable, stressed or anxious.
- Irrational, confusing or erratic responses to simple statements or questions.
- Making excuses not to talk or interact.
- A reliance on the immediate care or support of a charity.
- Eagerness to donate (sometimes large sums of money) without sufficient knowledge of the cause or without asking the types of questions a regular donor would in the same situation.

Southland Foundation personnel should be aware of the signs of vulnerability and should not seek donations from people who don't appear to have the capacity to make informed decisions about donations.

Interacting with vulnerable individuals

Southland Foundation personnel should ensure they are treating vulnerable people fairly and with care:

- **In all circumstances, the person is advised to seek independent advice.**
- **No final decision should be made without a confirmation discussion involving their trusted advisor/s.**
- Speak clearly and use terms that the person can understand.
- Repeat important pieces of information – particularly the consequences of a decision to donate.
- As the interaction progresses, check that the person understands and is happy to continue.
- Do not put pressure on the person to donate – politely accept any refusals to donate.
- Provide the person with relevant information and options for donating later so they can consider their decision in their own time.

If Southland Foundation personnel have reason to believe that a potential donor may be in a vulnerable state and unable to make a confident and informed decision to donate during the interaction, they should not accept the donation. In these situations, Southland Foundation personnel should encourage the individual to seek professional advice from their trusted advisors regarding the donation and provide them with a way to contact the Southland Foundation later with a decision.

If the Southland Foundation learns that a donation has been made by a vulnerable person without informed consent, Southland Foundation may wish to consider providing a refund for the donation. This will depend on the particular circumstances of the donation.

What steps should Southland Foundation take to ensure they treat vulnerable donors fairly?

Southland Foundation needs to consider people in vulnerable circumstances in terms of donor engagement. Acting without sufficient regard for the circumstances of donors could result in a loss of support and funds and can cause irreparable damage to Southland Foundations' reputation.

Beyond this, however, it is highly unethical to exploit vulnerable people in order to secure funding.

The Southland Foundation Board & Personnel (the responsible persons) should ensure that:

- Southland Foundations' fundraising strategies consider the needs of people in vulnerable circumstances and contain measures to minimize risks of them being targeted or exploited.
- Southland Foundation personnel recognise the indicators of vulnerable circumstance and know how to act appropriately when they encounter a person in such circumstances.

Policy Version Control	Action	Date Adopted/Amended
1	New policy	31/05/2024