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ToucanTech Webinar

# Engaging with Vulnerable People: Guidance for fundraisers, development officers and charities

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# ENGAGING WITH VULNERABLE PEOPLE

Helpful guidance for fundraisers, development officers and charities

Webinar written and presented by  
Jenny Robertson, Silver Marketing





# ABOUT ME

- Involved in the independent school sector for last 10 years as parent, marketer and development officer
- My work focuses on business development through marketing, branding and communications
- Running training on customer engagement, over 50s and vulnerable people
- I'm a ToucanTech customer

[www.silvermarketing.co.uk](http://www.silvermarketing.co.uk)

<https://www.linkedin.com/company/silvermarketinguk>

[jenny.robertson@silvermarketing.co.uk](mailto:jenny.robertson@silvermarketing.co.uk)



# THIS IS A POSITIVE OPPORTUNITY



- All individuals may, at some stage in their life, be considered vulnerable
- It's often a temporary state
- Keep an open mind
- Don't be nervous or worried
- Embrace vulnerable supporters
- With the right knowledge and systems in place it can be win-win for you all

# WHAT IS VULNERABILITY?

01

**Health:** Health conditions or illnesses that affect the ability to carry out day to day tasks

- Physical disability
- Severe or long-term illness
- Hearing or visual impairments
- Poor mental health
- Low mental capacity

02

**Life events:** Major life events having a negative impact

- Bereavement
- Relationship breakdown
- Caring responsibilities
- Income shock

03

**Resilience:** Low ability to withstand financial or emotional shocks

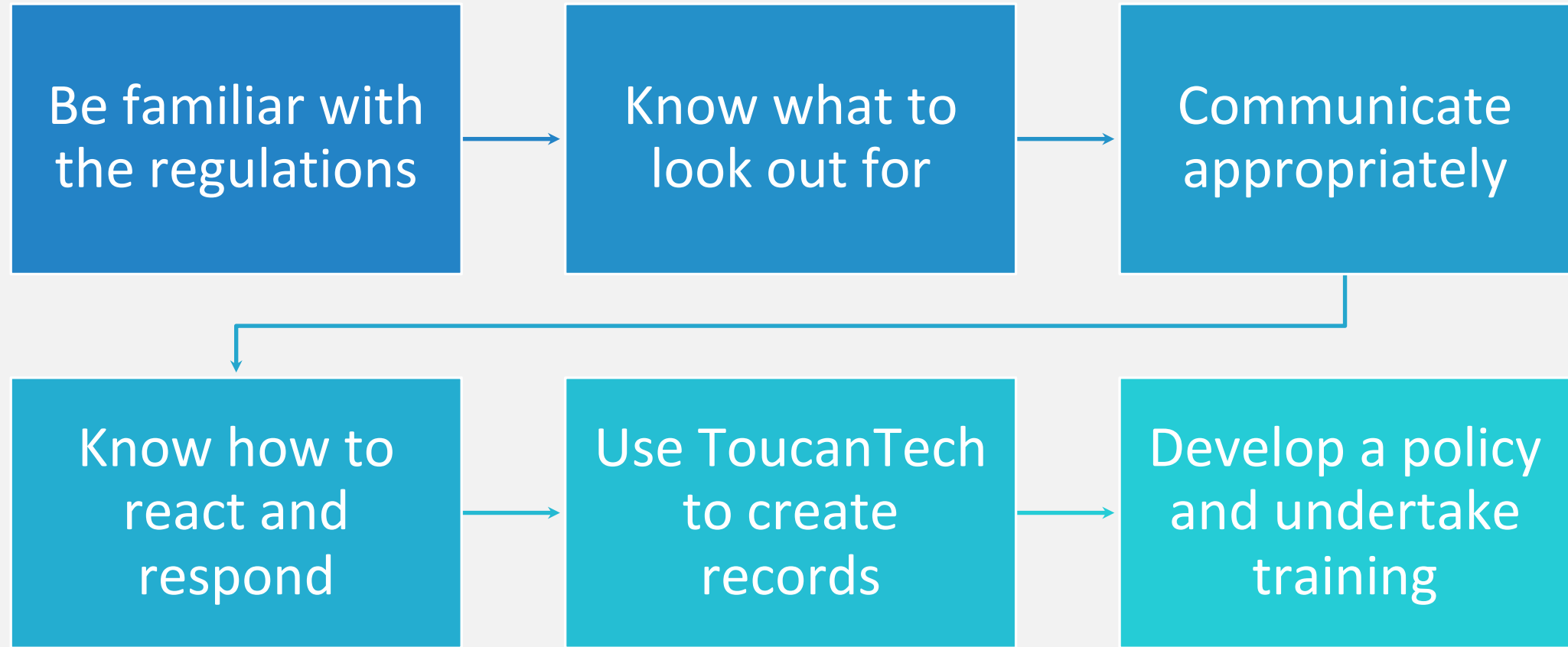
- Low or erratic income
- Low savings
- Over indebtedness
- Low emotional intelligence
- No support structure

04

**Capability:** Low knowledge of financial matters or low confidence in managing money

- Poor literacy or numeracy skills
- Poor or no digital skills
- Poor/no English language skills
- Learning impairments

# SIX STEPS TO GETTING IT RIGHT



# REGULATIONS FOR FUNDRAISERS

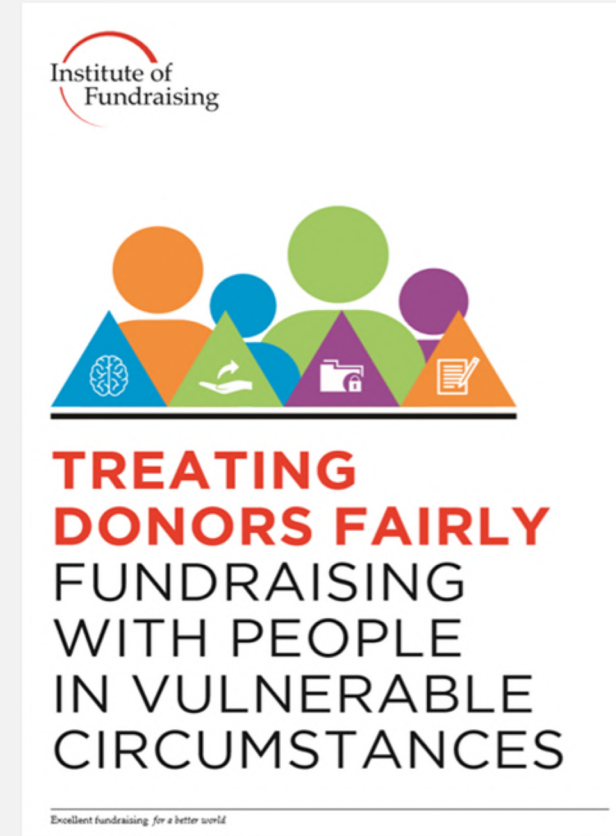
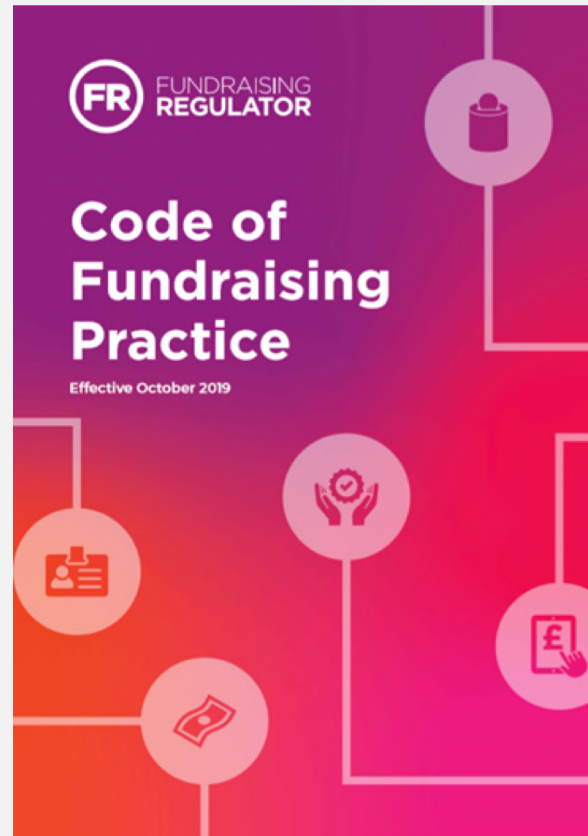
## CHARITIES ACT 2016

Requires charities to:

Protect the vulnerable  
and

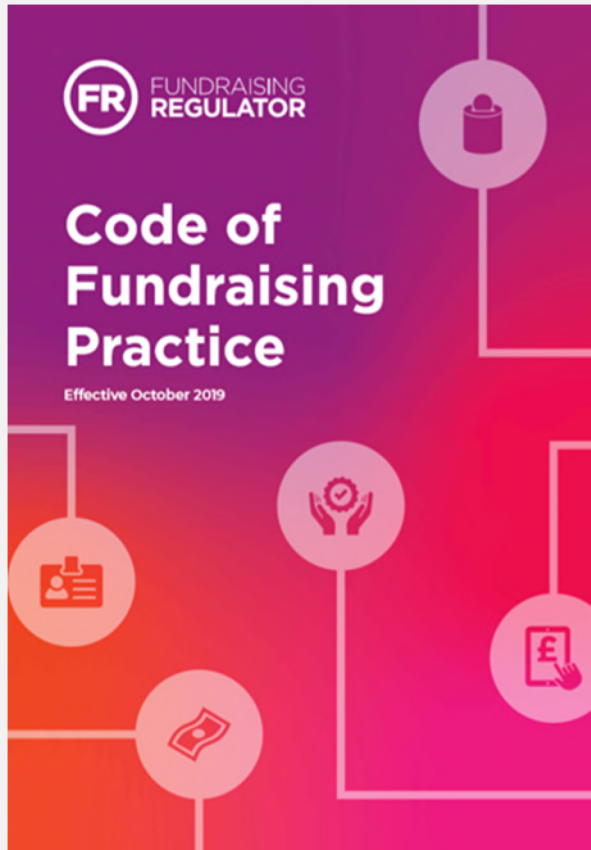
To ensure that any third  
parties fundraising on  
their behalf maintain  
high standards.

“





# CODE OF FUNDRAISING PRACTICE



- You must take into account the needs of any possible donor who may be in vulnerable circumstances or need extra care and support to make an informed decision.
- You must not exploit the trust, lack of knowledge, need for care and support or vulnerable circumstance of any donor at any time.
- You must not take a donation if you know, or have good reason to believe, that a person lacks capacity to make a decision to donate, or is in vulnerable circumstances which mean they may not be able to make an informed decision.

# TREATING DONORS FAIRLY



## **TREATING DONORS FAIRLY** FUNDRAISING WITH PEOPLE IN VULNERABLE CIRCUMSTANCES

Excellent fundraising for a better world

### **Respect**

Always be respectful. 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.

### **Fairness**

Treat your donors fairly. This includes not discriminating against any group or individual based on their appearance or health conditions.

### **Responsive**

Respond appropriately to the individual needs of your donors. The responsibility lies with fundraisers to adapt their approach (tone, language, communication technique) to suit the needs and requirements of the donor.

### **Accountable**

Take responsibility for your actions, ensuring that your fundraising is carried out in line with the Code of Fundraising Practice. Consider what processes and procedures your charity may need in place to ensure this happens and that the needs of people in vulnerable circumstances are met.

Disconnected	<p>Asking irrelevant and unrelated questions</p> <p>Responding in an irrational way to simple questions</p> <p>Wandering off the subject and making incongruous statements</p>
Confused	<p>Unable to read and understand information and asking for it to be continually repeated</p> <p>Saying yes or no at times that it is clear they haven't understood</p> <p>Taking a long time or finding it difficult to respond to simple questions or requests for information</p>
Forgetful	<p>Repeating simple questions such as 'who are you', 'what charity is it' and 'what do you want'</p> <p>Having trouble remembering relevant information, for example that they are already a regular donor to that charity or have recently donated</p>
Poor Health	<p>Displaying signs of ill-health like breathlessness or making signs of exasperation or discontent</p> <p>Saying that they are not well or not in the mood to continue</p>
Uncomfortable	<p>Giving a statement such as 'I don't usually do things like this, my husband or wife/son or daughter takes care of it for me</p> <p>Indicating in any way that they are feeling rushed, flustered, or experiencing a stressful situation</p>

## HOW TO SPOT VULNERABILITY

# COMMUNICATION TIPS



Be upfront, tell the person why you are calling and check they are happy to continue.

Never presume they have the mental capacity to take the call or make the decision

Ask if they would prefer to be contacted in a different way, email or letter, or at a different time



Reflect their terminology, tone, speed, and pitch of voice

Speak clearly, repeat information and be aware of memory loss

Be positive and adult to adult in tone, don't be patronizing



Be patient, take time, allow pauses and gaps and don't rush to fill them in.

Avoid guessing what is 'wrong' with a customer, focussing instead on the decision making difficulties a customer may have.



Listen carefully and summarise for certainty. Check their understanding throughout the call and ask if they need further information

Always provide reasonable support to individuals to make their own decisions.



Ask if they would like to talk to someone else before making a decision  
Follow up calls with a letter or email and give detailed information

Remember the decision is always the customers to make

Be prepared to end the call if you have concerns

# KNOW HOW TO RESPOND

## Vulnerable (no concerns)

- Delay acceptance of the gift to give the donor further time to consider their donation
- Include a cooling-off period
- Suggest the donor gets advice from family or friends

## Vulnerable (with concerns)

- Reassess the donation as a fundraising team and if necessary, involve your trustees
- Weigh up the benefits of receiving a donation versus the reputational damage that may be caused by accepting the gift.
- For a donation to be refused, or returned, the charity must be reasonably satisfied that the damage caused by accepting the donation will outweigh the monetary benefits.

## Lacks capacity to make decision

- Any donation should be deferred or refused
- After the donation, if you receive evidence that the person lacked capacity to make the decision to donate, then the charity can and should return the donation because the original donation was invalid

# KEEPING RECORDS



It makes sense to keep records and information about vulnerable people



But we have to comply with the Data Protection Act regarding personal sensitive information



Information about a person's mental or physical condition can only be held with that person's consent



All information stored about a person should be accurate, relevant, not excessive and up-to-date



ToucanTech can help us record and manage the right information

## An individual's 'personal declaration'

- Individuals can freely give information to a charity that they would like that organisation to keep a note of.
- You can record the information on the database which can help manage and tailor communications to be appropriate and sensitive.
- If an individual provides sensitive personal data, for example by making a statement about their condition or circumstance, you should ask the individual if they would like the information to be recorded on file
- A personal declaration can be given in writing or by a verbal statement.

## Quality assessment

- You can record a 'quality assessment' of an interaction with a supporter
- This should **not** be any assessment of the individual's condition or circumstance
- It should be but a review of the quality of the interaction from your point of view.
- A quality assessment can be noted and recorded within your database
- You must avoid opinions which may constitute personal data.
- Such information would need to be disclosed if the individual ever made a subject access request.

KEEPING  
RECORDS –  
WHAT WE  
CAN DO

# USING TOUCANTECH: DOCS

## RECORDS

- MANAGE RECORDS
- REGISTRATION FIELDS
- USER GROUPS
- FIELDS
- CONSENT OPTIONS
- INSTITUTIONS
- ADMINISTRATORS

### Manage Records

SEND EMAILEXPORTUPLOAD DOCEXITCANCEL

Jenny RobertsonOnline profile

D.O.B:User groups:Do not contact (offline)Tester

SUMMARYONLINE/PROFILEOFFLINE/RECORDNOTESFUNDRAISINGACTIVITY TRACKERCAREERSRELATIONSHIPS

**DOCS**ADMIN

Used space: 132.46 MBFree space: 867.54 MBTotal space: 1000 MB13%

SEARCH DOCUMENTS

TitleTypeLogical operatorORCLEARFILTER

0 documents selected

DELETE DOCUMENTSDOWNLOAD DOCUMENTS

TIMESTATUS

Personal information

Uploaded on 16 Jun 2020 by Jenny Robertson

DOCUMENT TYPEFILE TYPESIZE (MB)ACTIONS

Comms-Emailmsg0.17ACTIONS

Fwd: Example email

JR Jenny Robertson <jenny.robertson@silvermarketing.co.uk>To: Jenny Robertson

----- Original Message -----From: Jenny Robertson <jenny.robertson@silvermarketing.co.uk>To: jenny.robertson@silvermarketing.co.ukDate: 16 June 2020 at 11:39Subject: Example email

Dear Jenny


Please note that due to the death of my beloved cat, Ginger, please do not contact me for the next 3 months.

Kind regards

Jenny Robertson

Jenny Robertson07500 865550

www.silvermarketing.co.uk





# USING TOUCANTECH: ACTIVITY TRACKER

**Records**

**MANAGE RECORDS**

REGISTRATION FIELDS  
USER GROUPS  
FIELDS  
CONSENT OPTIONS  
INSTITUTIONS  
ADMINISTRATORS

Manage Records

SEND EMAIL EXPORT UPLOAD DOC EXIT CANCEL

Jenny Robertson Online profile

D.O.B:

User groups: Do not contact (offline) Tester

SUMMARY ONLINE/PROFILE OFFLINE/RECORD NOTES FUNDRAISING **ACTIVITY TRACKER** CAREERS RELATIONSHIPS DOCS ADMIN

0 0 0 0 0 0

Emails opened (last 12 months) Email last opened Events attended (last 12 months) Most recent event Postal mailings (last 12 months) Phone calls (last 12 months) Meeting/visit(s) (last 12 months)

+ ADD ACTIVITY

**FILTER THE LIST OF ACTIVITIES**

Activity type: -- All -- Assigned admin: -- All -- Creator: -- All --

Keyword: Type keyword... Date range: Date From Date To

2 activities found matching your search criteria

CLEAR FILTER

DELETE

Sort by: Date - Most recent first

<input type="checkbox"/>	TYPE/RECIPIENT(S)	ACTIVITY NAME	DATE/ASSIGNED ADMIN	LINKED TO	DETAILS AND RESULTS
<input type="checkbox"/>	* Telephone Call: Outgoing 1 people	Phone Call Jenny Robertson	11 Sep 2020 14:58		
<input type="checkbox"/>	* Telephone Call: Outgoing 1 people	Phone call Jenny Robertson 11 June	11 Jun 2020 16:14		Asked for no contact for 3 months - see saved doc

# USING TOUCANTECH: RECORD A QUALITY ASSESSMENT

## Records

### MANAGE RECORDS

REGISTRATION FIELDS

USER GROUPS

FIELDS

CONSENT OPTIONS

INSTITUTIONS

ADMINISTRATORS

### Manage Records

SEND EMAIL

EXPORT

UPLOAD DOC

EXIT

CANCEL

Jenny Robertson Online profile

D.O.B:

User groups:

Do not contact (offline)

Tester

SUMMARY

ONLINE/PROFILE

OFFLINE/RECORD

NOTES

FUNDRAISING

ACTIVITY TRACKER

CAREERS

RELATIONSHIPS

DOCS

ADMIN

Admin group

Full Admin

Two factor authentication

No verification e-mail address

Status

Online profile

Change password

Type new password

Consent Options



I am happy for my data to be stored on this database

Edited Jenny Robertson, 08 Jun 20,



I am happy to receive email communications from the Toucan

Community

Edited Jenny Robertson, 08 Jun 20, Consent check at registration (Network)



I am happy to receive email communications from the Toucan

Notes

10 Jun 2020

On 5th May I, Jenny Robertson, had a telephone conversation with Ms Jenny Robertson. I did not think the telephone call went well and I wouldn't recommend calling this individual again  
— Jenny Robertson

See more ...

See less ...

Addresses

No addresses added.

Show Previous Addresses...

+ ADD ADDRESS

Postal labels

Not a member of an addressee group.

+ ADD POSTAL GROUP

Add an important note to “stick” to the summary record page

# USING TOUCANTECH: OFFLINE USER GROUPS

**TOUCAN ADMIN PORTAL**  
Admin Portal

Jenny Robertson  
Full Admin

[Go to community website](#)

DASHBOARD SETTINGS **RECORDS** CONTENT CAREERS FORMS COMMS DOCS FUNDRAISING REPORTING IMPORT SUPPORT

## Records

MANAGE RECORDS  
REGISTRATION FIELDS  
**USER GROUPS**  
FIELDS  
CONSENT OPTIONS  
INSTITUTIONS  
ADMINISTRATORS

User groups ADD USER GROUP

Every record in your database will be assigned one or more User Groups, you can see the number of records in each User Group in brackets after the User Group name.  
You can edit the name of your User Group and a few other settings by clicking on it to expand the controls. To delete a User Group please contact [support](#) for instructions.  
Use the arrows to reorder your User Groups and set the order in which they will appear on the registration form dropdown and other drop downs around the website and admin portal.

- ▼ Tester (153)
- ▼ **Do not contact (0)**
- ▼ Resource download (0)
- ▼ Guest donors (14)
- ▼ Former student (140)
- ▼ Career Mentor (32)
- ▼ Staff (27)
- ▼ Former staff (21)

**TOUCAN ADMIN PORTAL**  
Admin Portal

Jenny Robertson  
Full Admin

[Go to community website](#)

DASHBOARD SETTINGS **RECORDS** CONTENT CAREERS FORMS COMMS DOCS FUNDRAISING REPORTING IMPORT SUPPORT

## Records

MANAGE RECORDS  
REGISTRATION FIELDS  
USER GROUPS  
FIELDS  
CONSENT OPTIONS  
INSTITUTIONS  
ADMINISTRATORS

Manage Records + ADD RECORD

**BASIC SEARCH** 🔍

Record Type: -- All --  
Individual / Organisation Name:   
Keywords:

**User Groups**

- Cothill House (offline)
- Do not contact (offline)
- Email capture form (offline)
- Event guests (offline)
- Former Parent (offline)
- Former staff
- Former student
- Friend of the school (offline)
- Guest donors

Status: -- All --  
Email:

**YOUR SEARCH FILTERS**   
**ADVANCED FILTERS**

487 records found matching your search criteria CLEAR FILTER

0 records selected

+ FLEXIGROUP REMOVE/ADD USER GROUP EMAIL LOG ACTIVITY EXPORT CLEAR SELECTION MERGE MEMBERS

Show 40 entries Customise the table columns

<input type="checkbox"/>	NAME	EMAIL	USER GROUP/S	STATUS	WEALTH SCORE	ACTIONS
<input type="checkbox"/>	Testy McTestface	lkensok@mir.org	Under 18	Offline		<span>ACTIONS</span>
<input type="checkbox"/>	Sufia Doha	sufiadc7@gmail.com	Tester	Awaiting approval		<span>ACTIONS</span>
<input type="checkbox"/>	Francesca Barry	francesca@toucantech.com	Tester	Online Profile		<span>ACTIONS</span>

# USING TOUCANTECH: OFFLINE USER GROUPS

DASHBOARD SETTINGS **RECORDS** CONTENT CAREERS FORMS COMMS DOCS FUNDRAISING REPORTING IMPORT SUPPORT

## Records

**MANAGE RECORDS**

REGISTRATION FIELDS

USER GROUPS

FIELDS

CONSENT OPTIONS

INSTITUTIONS

ADMINISTRATORS

Manage Records

SEND EMAIL EXPORT UPLOAD DOC EXIT CANCEL

Jenny Robertson Online profile

D.O.B: ✎

User groups: Tester ✕ Do not contact (offline) ✕

SUMMARY ONLINE/PROFILE OFFLINE/RECORD NOTES FUNDRAISING ACTIVITY TRACKER CAREERS RELATIONSHIPS DOCS ADMIN

Admin group

Full Admin

Two factor authentication

No verification e-mail address

Status

Online profile ▼

Change password

Type new password

✎ Consent Options

♥ I am happy for my data to be stored on this database

Edited Jenny Robertson, 06 Jun 20,

Addresses

No addresses added.

Show Previous Addresses...

+ ADD ADDRESS

Postal labels

Not a member of an addressee group.

+ ADD POSTAL GROUP

# USING TOUCANTECH: NOTES

TOUCAN ADMIN PORTAL

Admin Portal

Jenny Robertson  
Full Admin

Go to community website

DASHBOARD

SETTINGS

RECORDS

CONTENT

CAREERS

FORMS

COMMS

DOCS

FUNDRAISING

REPORTING

IMPORT

SUPPORT

Records

MANAGE RECORDS

REGISTRATION FIELDS

USER GROUPS

**FIELDS**

CONSENT OPTIONS

INSTITUTIONS

ADMINISTRATORS

Fields

SHOW ALL FIELDS

+ ADD

FIELD / SUB-FIELD NAME	FIELD TYPE	MULTIPLE CHOICE	ONLINE	CORE / CUSTOM	USER GROUPS	ACTIONS
Personal information						
<input type="checkbox"/> Favourite Tuck				Custom	All User Groups	
<input type="checkbox"/> Hat size				Custom	All User Groups	
<input type="checkbox"/> Interaction Assessment				Custom	All User Groups	
<input type="checkbox"/> Membership End date the quick brown fox jumped over the lazy dog testing length of field				Custom	All User Groups	
<input type="checkbox"/> Shoe size				Custom	Former student	
Family/ Relationships						
Institution specific						
<input type="checkbox"/> A level subjects				Custom	Former student	
<input type="checkbox"/> Any volunteer work at the school				Custom	Former student	
<input type="checkbox"/> Applicant Status?				Custom	Former student	
<input type="checkbox"/> Are there any other ways your hear about the Drinks Trust?				Custom	All User Groups	
<input type="checkbox"/> Boarding house				Custom	Student	
<input type="checkbox"/> Bursary student				Custom	Former student	
<input type="checkbox"/> Committee Roles				Custom	Former student	
<input type="checkbox"/> Committees				Custom	Staff	
<input type="checkbox"/> Connection to school				Custom	Friend of the school	

System

Hide

<input type="checkbox"/> Accounting periods			Core	All User Groups	
<input type="checkbox"/> Activity types			Core	All User Groups	
<input type="checkbox"/> Experience/ Industry types			Core	All User Groups	
<input type="checkbox"/> Label type/ Postal label types			Core	All User Groups	
<input type="checkbox"/> Note categories			Core	All User Groups	

Edit field options

Add new option \*

SAVE NEW OPTION

Saved options:

Activity

Automated

Careers

Contact form

Deceased

Email contact form

Family

Fundraising

General

Relationships

Communications

Donors' Board

Update

**Personal info**

SAVE CHANGE

SAVE CHANGE

SAVE CHANGE

SAVE CHANGE

<input type="checkbox"/> Organisation tags			Core	All User Groups	
<input type="checkbox"/> Team/ Function types			Core	All User Groups	

# USING TOUCANTECH: NOTES

## Add Note ×

**Note category:**

**Date:**

**Logged by:**

**Important:**

**Linked to records:**

Email contact form

Family

Fundraising

General

Relationships

Communications

Donors' Board

Update

Personal info

# DEVELOP A POLICY AND UNDERTAKE TRAINING

- Be prepared
- Develop a policy or process for your Development Office and SLT or trustees
- Undertake training or produce guidance notes for your fundraising and development team
- Prepared and practice your responses
- If you use external fundraisers, refer to the guidance documents listed at the start
- Familiarise yourself with how the ToucanTech system can help you record data



# THINK DIFFERENTLY

“We know that vulnerable people, much like older people, deserve to feel valued, respected and want to have a relationship with organisations they trust”



# SHIFT YOUR THINKING



- Regulations cover fundraising
- We come across words like:  
deal with  
treat and  
interact
- Something that we want to get done as swiftly and efficiently as possible before we can move onto something less problematic or more rewarding.



- But we are in the business of friend-raising, making connections and creating a community
- School represents one of the most important elements in someone's life
- Embrace and support those vulnerable people within your community.

# FINAL THOUGHTS



<https://www.bbc.co.uk/programmes/p08d9sk5>

# ANY QUESTIONS?

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to post questions relating to the webinar topic, access the webinar recording and slides and continue the discussion after the webinar!



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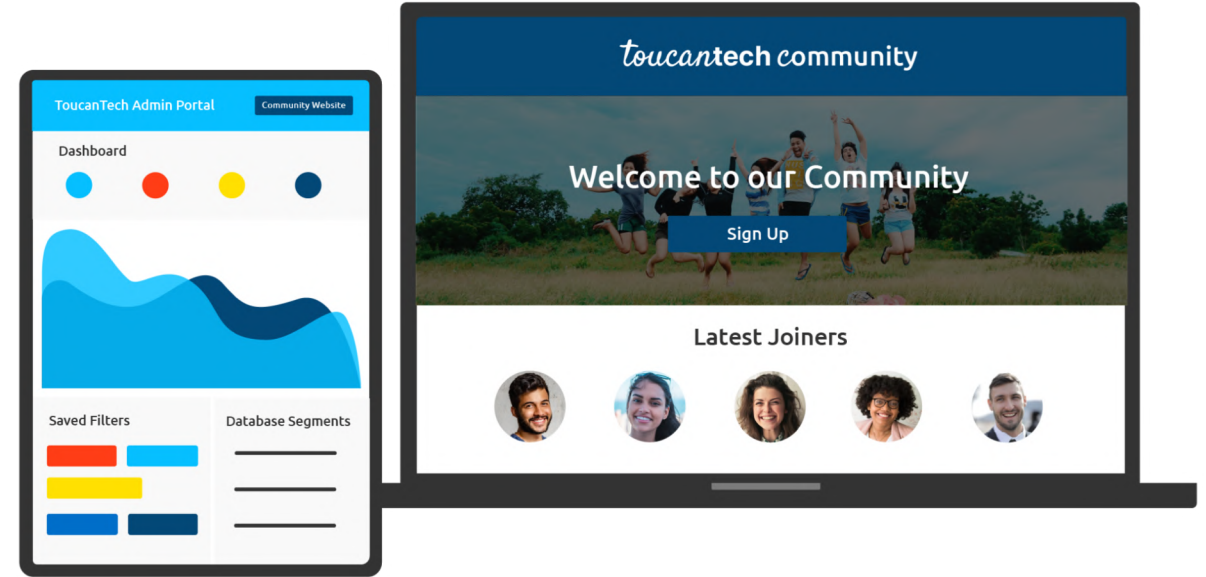
<https://www.linkedin.com/company/silvermarketinguk>

[jenny.robertson@silvermarketing.co.uk](mailto:jenny.robertson@silvermarketing.co.uk)

Tel: 07500 865550

# About ToucanTech

ToucanTech is an easy, affordable and beautiful fundraising CRM and website software to manage your supporter records, email newsletters, online payments, events, mentoring, careers and more!



## Any questions?

Please contact Amy – [amy@toucantech.com](mailto:amy@toucantech.com)  
[www.toucantech.com](http://www.toucantech.com)

