

Guide for Churches on Giving and Vulnerable People

It is probable that churches will come into contact with people who may be vulnerable and need additional support to make an informed decision. We have produced this guidance and checklist, alongside our [‘Guide for Churches on Fundraising Regulation and Church Giving’](#), to help churches develop a greater understanding and confidence in responding appropriately to givers who may be vulnerable.

What is a ‘vulnerable person’?

An individual who finds it difficult to immediately make an informed decision about the choices offered to them is called a ‘vulnerable person’. Within a giving context, they may not always have the capacity to fully understand the nature or consequence of making a financial donation or gift to the church.

A vulnerable person may experience:

- ≈ A diagnosed condition such as dementia
- ≈ An undiagnosed or temporary mental health condition such as severe anxiety
- ≈ A recent bereavement
- ≈ A dramatic change in personal circumstances
- ≈ Learning difficulties

Recognising a vulnerable person

If a person is concerned that an individual they are talking to may be vulnerable or in a vulnerable situation, they must end the conversation about giving. This should be done politely, without making a request for financial support, and without enquiring about or referring to the individual's capacity.

A vulnerable person may display some of the following:

- ≈ Asking irrelevant and unrelated questions, or displaying signs of forgetfulness
- ≈ Repeating simple questions or having trouble remembering relevant information
- ≈ Giving a statement such as ‘I don’t usually do things like this, my spouse/child usually takes care of it for me’
- ≈ Saying ‘yes’ or ‘no’ at times that it is clear they haven’t understood

How you can positively respond to the needs of a vulnerable person

How your church responds to the needs of an individual will depend on the nature of the interaction and engagement. By considering the following, we can help all givers of the church connect with the issues they care about.

- ≈ Speak clearly, avoiding words and phrases that may be hard to understand
- ≈ Be upfront and tell the individual why you are talking to them and check they are happy to continue
- ≈ Check their understanding at relevant points in the conversation
- ≈ Encourage the individual to take information away, pray, reflect and talk to anybody else before making a decision

Improving practice and understanding

- ≈ Further information on the Code of Fundraising Practice and its’ relevance to churches can be found in our [‘Guide for Churches on Fundraising Regulation and Church Giving’](#).
- ≈ A comprehensive checklist to identify whether someone may be vulnerable can be found on page 10 of the CIOF [‘Treating Donors Fairly’](#) guidance.
- ≈ Watch the online 10-minute training video on this subject prepared by the CIOF here ([coming soon](#))

Vulnerable Persons Checklist	Action Needed	Complete
<p>1. Add an Agenda Item on this at your PCC Meeting</p> <p>Circulate this guidance in advance. Ask PCC members to consider issues of vulnerability when involved in future conversations with supporters.</p>		<input type="checkbox"/>
<p>2. Watch Vulnerable Persons Training Video</p> <p>The CIOF have developed a short 10 min online training course for PCC members. We encourage everyone involved in encouraging giving and generosity to complete this training session.</p>		<input type="checkbox"/>
<p>3. Review all giving materials and website content</p> <p>Following the guidance on responding positively to the needs of vulnerable persons, review the wording, language and practices related to generous giving. Make sure communications are clear and givers can contact a PCC member directly to discuss any concerns.</p>		<input type="checkbox"/>
<p>4. Revisit practices on an annual basis</p> <p>As part of your annual giving review, an opportunity to raise awareness of the issue and share the PCCs recent training.</p>		<input type="checkbox"/>

This document has been produced by the National Giving Team of The Church of England (January 2021)

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