

Fundraising Code of Conduct for staff and volunteers

Age UK Surrey follows the Institute of Fundraising code of conduct. In the course of delivering a service or activity, clients should be advised if a service fee applies. For clients receiving a free service, there is no requirement for them to donate to the charity.

Donations can be restricted (the client specifies the service/activity of the charity that the donation should be used to support) or unrestricted – the donation supports the whole charity in delivering its vision and objectives.

When talking to people about donating to Age UK Surrey, or in the receiving or handling of donations, the following guidelines should be adhered to:

General behaviour

- You must be polite to people at all times, honest and respectful.
- You must not unfairly criticise or insult other people or organisations.
- You must not encourage a donor to cancel or change an existing donation in favour of a donation to another charitable institution.

Asking for support

- You must take all reasonable steps to treat a donor fairly, so that they can make an informed decision about any donation.
- You must not fundraise in a way which is an unreasonable intrusion on a person's privacy, is unreasonably persistent or places undue pressure on a person to donate.
- You must not continue to ask a person for support if that person clearly indicates – by word or gesture – that they do not want to continue to speak to you. You must end the conversation in a polite way.
- You and the fundraising materials you use must not mislead anyone, or be likely to mislead anyone, either by leaving out information or by being inaccurate or ambiguous or by exaggerating details.

Vulnerable clients and capacity

- 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, apparent 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. Among other things, you should consider:
 - any physical or mental-health condition the person may have;
 - any disability the person may have;
 - any learning difficulties the person may have;
 - whether the person is facing times of stress or anxiety (for example, following the death of a loved one or redundancy);
 - whether a donation is likely to affect the person's ability to sufficiently care for themselves or leave them in financial hardship;

- how well the person can communicate and understand what they are being told;
- whether the person is under the influence of alcohol or drugs; and
- the person's age.

If a donor makes a donation while they do not have the capacity to make an informed decision, you must return the money to them.

Donations

- You must not leave unsecured cash unattended.
- You must make sure that cash donations are placed in a sealed container or collecting box these must be given to the fundraising team so they can be opened in accordance with the Code of Conduct.
- Information about donations must be passed to the fundraising team so that receipt and thanks can be given to the donor in accordance with the Code of Conduct.
- You must send the charitable institution (or institutions) the full amount taken from all collecting boxes without taking any expenses or fees, unless these have been agreed beforehand.