

Coronavirus (COVID-19): fundraising key principles guidance

As the Government begins to ease lockdown restrictions and a phased approach for how and when certain ways of working may return, charities and their partners will be thinking about what it means for fundraising. Although going back to a complete 'business as usual' is unlikely to be acceptable or realistic – whether by charities, government, or the public – as some fundraising activities resume in the weeks and months ahead it is important that they are carried out sensitively, safely and responsibly.

This guidance is part of a series of resources produced by the Fundraising Regulator and Chartered Institute of Fundraising that aim to support charities and other fundraising organisations to be able to return to fundraising activities in a responsible way. By responsible fundraising we mean that fundraising is carried out in a sensitive and safe way, in-line with the [Code of Fundraising Practice](#) and current [Government advice](#). Requirements may also differ between England the devolved nations of [Scotland](#), [Wales](#) and [Northern Ireland](#). Depending on where your charity carries out fundraising, you should always check the relevant guidance and apply it to your fundraising activity.

This guidance highlights the issues you should consider when adapting the way your organisation fundraises during the pandemic, in particular:

- how to plan your future fundraising;
- how to behave and interact safely and respectfully with the public; and
- how to safeguard the public, staff and volunteers.

Status of this guidance

This guidance is intended to aid good decision making and sets out a framework for responsible fundraising. It is the responsibility of each individual organisation to exercise judgment about how and when they restart any paused fundraising activities in light of Government advice and the advice set out in this guidance. Part of acting responsibly will also include fundraising organisations properly documenting their decisions, undertaking risk assessments, and being prepared to explain and justify these if necessary.

Getting back to fundraising – planning and risk assessments

- **Keep up-to-date and follow [Government guidance](#).** The Government has stated that the current restrictions are likely to change over a period of time. You must keep up-to-date with announcements and apply any new requirements and limitations to your fundraising activities. Be prepared to be flexible and be mindful that long-term planning is still difficult at the moment. There may be differences in the easing of restrictions across England, Scotland, Wales and Northern Ireland, and therefore you will need to make sure your fundraising is carried out in line with Government advice in the country your fundraisers are operating. Any guidance issued by any other body, including Fundraising Regulator and the Chartered Institute of Fundraising can only apply in an area that is compatible with Government advice for that country.
- **Have a responsive fundraising strategy.** While we are living in extraordinary times, it is important that all fundraising organisations carefully consider the risks associated with each type of fundraising they carry out. Risk-assessments should be properly documented and

kept under review, as appropriate. See section 2.2 of the code for more information. Although many charities may be under financial pressure because of the pandemic, it's important that decisions are thoroughly thought through. You don't have to try and do everything straight away – talk to your teams and fundraising partners about a timetabled approach so you can carry out responsible fundraising at the right time and in the right way.

- **Ensure proper oversight of decision making.** All fundraising organisations must weigh up the benefits and risks of their ongoing fundraising activities and exercise judgement when deciding what is in the best interests of the public, supporters, staff, volunteers and beneficiaries. It is important to have appropriate management and oversight of all decisions that are made, and ensure these are properly documented. [Trustees](#) are crucial in this process and are ultimately responsible for charities fundraising. Many fundraisers will have been furloughed so you should make sure you take into account the workload of your staff – don't overload your teams or put unrealistic targets and deadlines on them.
- **Be transparent with the public and others.** You should make information available (for example, on your website) that provides members of the public and others with information about how you will fundraise responsibly during the pandemic. You should explain the measures you are taking and how these align with Government advice.
- **Listen to feedback.** Fundraising organisations should listen to feedback they receive from the public, staff and volunteers to inform the way they carry out their fundraising during the pandemic. Your activity should be reviewed as often as possible, taking into account any complaints and feedback.

Safeguarding the public and fundraisers

- **Protect the public, staff and volunteers.** Measures must be in place to [protect the public, as well as your staff and volunteers](#). Depending on the method of fundraising, you'll need to consider what changing Government guidance means in terms of staff and volunteer safety. This includes ensuring that fundraisers have appropriate clothing and coverings to keep them and the public safe, or materials that ensure social distancing is observed.
- **Make sure that fundraisers are trained on new approaches.** New ways of working will need some time to be communicated, with appropriate training materials and resources produced to help guide fundraisers on what they should be doing. It's important that fundraisers feel confident and reassured before going back out to fundraise – if you work with a fundraising agency or partner, talk to them about their approach and agree appropriate measures and training.
- **Take into account the needs of people in vulnerable circumstances.** It is inevitable that fundraisers will come into contact with people who may be in a vulnerable circumstance, or need additional support to make an informed decision. Charities should also be mindful that during the pandemic, there are approximately 2 million people that have been asked to shield, because of the increased risks associated with COVID-19. You must take into account the needs of anyone who may be in [vulnerable circumstances](#). The pandemic may have increased the number of people who are vulnerable and [research](#) tells us that the crisis has had an impact on the nation's mental health. You may want to consider reviewing any existing policies on vulnerable circumstances your organisation has, to ensure adequate safeguarding of the public. See section 1.3 of the code for more information.

Respectful interaction with the public

- **Consider how the public may respond to your fundraising.** Some members of the public may be feeling unusually anxious interacting with other people at this time, especially strangers, given the current restrictions on daily life. While you may be able to gradually introduce a particular type of fundraising, it may reflect negatively on your organisation and the fundraising sector as a whole if members of the public believe you are acting too quickly or are putting people at risk. Of course, different members of the public will respond differently – some will be keen to talk about the work of charities through the pandemic and want to support where they can, but it is important to be aware that there is likely to be a range of responses and for you to plan how to respond appropriately. Review your plans regularly, and be ready and willing to explain openly and clearly why you are fundraising, and the steps you've taken to ensure it is happening responsibly.
- **Be polite and respectful.** You must remain polite and respectful at all times. This is particularly important now as people's daily lives have changed and there is heightened concern around personal and financial wellbeing. See section 1.1 of the code for more information.
- **Do not apply undue pressure to donors.** As the services of charities come under increasing demand, public donations are more important than ever in order for charities to meet demand. Although you can talk about your cause and why a donation matters to your charity, this needs to be in line with the code (see section 1.2). You must not apply undue pressure (for example, intrude on their privacy or c to press ahead with a fundraising ask if they have already said 'no'). (See standard 1.1.3)
- **Be mindful that public support may change over time.** Although the public continues to be hugely supportive of charities during the pandemic, do not assume that all individuals will want to donate or engage with you in the same way as they did before. Many people will want to give and are keen to donate, others will be experiencing financial difficulties, anxiety or grief. It is impossible to know every individual's situation, but you should consider the range of likely responses and ensure that your fundraisers are actively responding appropriately to the signals and needs of any individual.