

## **VULNERABLE PERSONS POLICY**

### **Who?**

The Academy of Ancient Music has a responsibility to identify and protect vulnerable people who may wish to donate to the AAM or may be prospects.

A vulnerable person is anyone who lacks or may lack the capacity to take the decision to donate. This may be the result of:

- physical or mental-health condition;
- disability;
- learning difficulties;
- 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 care for themselves sufficiently or leave them in financial hardship;
- how well the person can communicate and understand what they are being told;
- the influence of alcohol or drugs; or
- the person's age.

### **How?**

The Academy of Ancient Music will never exploit any vulnerable person. We will not accept donations from anyone we believe to be vulnerable. Where the Academy of Ancient Music unknowingly accepts a donation from a vulnerable person, the donation will be returned to them as soon as possible.

As a rule, the Academy of Ancient Music only contacts a person if they have been recommended to us or have asked to receive communications from us, in person or via our online sign-up form (see UK GDPR policy for information on Data Protection). When getting in touch with donors and prospects the Academy of Ancient is always checking for signs of vulnerability. Unless we receive a specific request otherwise, the Academy of Ancient Music will not ask donors to make payments over the telephone but instead point donors to our main methods of taking donations (via bank transfer or credit/ debit card online). This allows donors to consider further or reconsider their donation should they want to.

### **Responsibilities**

Members of staff and agents working on behalf of the Academy of Ancient Music (eg Trustees or Development Board members) have a responsibility to notify the Head of Development if they believe a current donor or prospect could be a vulnerable person. They must include a summary of all correspondence they have had with the vulnerable person which must be recorded on the donor

database to enable us to identify this person as vulnerable. If the Academy of Ancient Music becomes aware that an agent working on our behalf has not observed the conditions set out in this policy, we reserve the right to remove them from any board or committee they serve on. Where someone is unsure if a person is vulnerable, they must contact the Head of Development for their advice.

Policy approved by John McMunn, Chief Executive

21.01.2025

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