The purpose of this guidance is to outline the issues requiring consideration for the safe management of face-to-face fundraisers while on site.

This document is for guidance only and is not intended to be construed as legal advice. Organizations are encouraged to design and tailor their safety protocols to fit their needs and ensure that their face-to-face fundraising activities are safe and prudent.

Each organization and individual undertaking face-to-face fundraising must understand the potential risks, and all individuals should be trained in the basic safety considerations, as referenced in this document. These guidelines are provided to assist in this effort, but cannot be the only source of guidance. Independent judgment is critical based on experience and knowledge.

**Risk Assessment**
Face-to-face fundraising activities in the field, whether in an urban or rural environment, should be risk assessed in advance of the work commencing. Assessments should be approved by, the relevant supervisor or head of department. Typical face-to-face fundraising issues, which will require consideration during the risk assessment process, include (this list should not be considered exhaustive):

- environment / location;
- physical threat or abuse;
- psychological trauma, as a result of actual or threatened violence or the nature of what is disclosed during the interview;
- travel issues,
- lone working;
- interview techniques;
- causing psychological or physical harm to others;
- comprising situations which may lead to accusations of improper behavior;
- exposure to infectious illness.

**Pre-Planning**
The key to successful and safe face-to-face fundraising is thorough planning, care and common sense. The following points should be considered during the planning phase:

- arranging training in good face-to-face fundraising techniques;
- awareness of any delicate issues involved with the fundraising. For instance, issues related on race, culture and gender may prompt hostility;
• dependent on the nature of the face-to-face fundraising, consider meeting local “community leaders,” groups or statutory bodies such as the police, to ask to explain the site location and possible risks and gain their endorsement;
• conducting face-to-face fundraising at neutral locations or public spaces or where neither party could be at risk;
• if in doubt about the safety of the location, familiarizing the fundraisers with the area in advance and assess the need for additional personnel, shadowing and pre-arranged pick-ups;
• seeking permission from any relevant authorities to work in your chosen location;

Project managers or other relevant supervisors should know:
• what each fundraiser will be doing;
• when each fundraiser will be doing it (specify dates and times of departure, appointments and return);
• the area in which each fundraiser will be working (include route details, names, addresses and telephone numbers of potential donors, if available);
• each fundraiser’s contact details (name, address, telephone numbers).

A formal process should be implemented to ensure that project managers or other relevant supervisors are alerted immediately if a fundraiser’s plans change (e.g., the fundraiser takes ill and must leave the site). That process should include a "check-in" system with a project manager or other relevant supervisor, such as phone calls at regular intervals, as well as an immediate response system in the event a fundraiser fails to “check-in.”

**General Personal Safety Considerations**

• where possible, fundraisers should work as a minimum in pairs;
• fundraisers should carry a mobile phone;
• fundraisers should always carry enough money for both expected and unexpected expenses, including the use of taxis (but not large sums of money or valuables unless absolutely necessary);
• fundraisers should ensure that their wallets, cameras, jewelry and expensive watches etc, are not on display;
• fundraisers should consider their dress carefully and professionally such that it is appropriate for the location and does not attract unneeded attention;
• fundraisers should not stand in places where you will be causing an obstruction;
• fundraisers should always carry an ID card and be prepared to identify themselves.

**Personal Safety Advice: Traveling Alone on Foot**

• whenever possible, fundraisers should avoid walking alone at night;
• fundraisers should stay on busy, well-lit roads and avoid poorly lit or rarely used underpasses and walk facing on-coming traffic;
• fundraisers are urged not to use a personal stereo - they will be unable to hear anyone approaching from behind;
• fundraisers should walk with confidence and purpose - try not to look as if they are not sure of where they are going;
Personal Safety Advice: Other People’s Homes
- fundraisers should not enter a house if the appropriate person is not available;
- fundraisers should wait to be invited in or at least ask to enter and let the homeowner lead the way;
- fundraisers should let them know how much of the homeowner’s time they will need.
- fundraisers should not enter if the person is drunk or aggressive;
- fundraisers should ensure that they can leave the premises quickly if necessary;
- if a fundraiser feels threatened at any point, the fundraiser should make an excuse and leave;
- fundraisers should try not to react negatively to the homeowner’s home or grounds.

Personal Safety Advice: Pets
- fundraisers should remember not all pets are "friendly";
- if entering a house with a dog or cat, fundraisers should ask that the animal be put in another room if they feel uncomfortable;
- If a fundraiser is "wary" of a dog, the fundraiser should not enter the house unless the owner is prepared to remove the animal from the premises (e.g., placing the dog in the backyard during the home visit).

Personal Safety Advice: Aggressive Behaviour
- It is important, even if someone is trying to provoke a fundraiser, for that fundraiser not to respond in kind. When faced with aggressive people or confrontational situations:
  - fundraisers should stay calm; speak gently, slowly and clearly;
  - fundraisers should not argue or try to outsmart the person verbally;
  - fundraisers should avoid body language which may be misinterpreted, such as looking down on the aggressor, placing hands on hips/folding arms, raising arms and/or any physical contact.
  - fundraisers should keep their your distance and not turn their back on someone who is behaving aggressively;
  - fundraisers should talk through the problem;
  - fundraisers should try to compromise and offer the aggressor a way out of the situation, do not be enticed into an argument.
- While talking, fundraisers should assess possible ways that they can escape if the situation worsens;
  - the fundraisers should try to prevent the aggressor blocking any possible escape routes;
  - fundraisers should never turn their back. If a fundraiser is trying to get away, they should move gradually backwards;
- Physical self-defense should only be used as a last resort because it limits a fundraiser’s options of getting away and will invariably commit the fundraiser to a fight. Remember also, that if a fundraiser responds physically, they could be legally liable for assault.

Reporting of Incidents / Accidents
All accidents and near-miss incidents, which occur during canvassing, interviewing, etc, must be reported to the project manager or other relevant supervisor.
References
The University of Central Lancashire’s Health and Safety Guidance for Door to Door or Street Canvassing and Interviewing

Any organization associated with the creation of these guidelines has done so solely as a service to help protect fundraisers and the public, but has not undertaken a duty to ensure safety. Therefore, the organizations must disclaim any liability with respect to injury, loss, or damage.