

Vulnerable Customers and Respondents Policy

Objective and Scope

The objective of the Prevision Research Vulnerable Customers Policy is to demonstrate the company's commitment to respecting and protecting the needs and well-being of all customers & respondents.

Roles, Responsibilities and Authorities

Roles and responsibilities for this policy are assigned to the Centre Manager. This role shall take responsibility for ensuring policy is in up to date.

Where an exception or deviation from an expectation or plan occurs, the senior assigned role shall make the determination in terms of what is an acceptable change. The change management process may need to be enacted.

Legal and Regulatory

Title	Reference
Data Protection Act 2018	https://www.legislation.gov.uk/ukpga/2018/12/contents
General Data Protection Regulation (GDPR)	https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/
The Privacy and Electronic Communications (EC Directive) Regulations 2003	www.hmso.gov.uk/si/si2003/20032426.htm
Market Research Society Code of Conduct	https://www.mrs.org.uk/pdf/MRS-Code-of-Conduct-2019.pdf
Market Research Society Fair Data Principles	https://www.fairdata.org.uk/10-principles/

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Policy

Our Process for Dealing with Potentially Vulnerable Customers/ Respondents

A person is unable to make a specific decision if they cannot understand information about the decision to be made, cannot retain that information in their mind, cannot use or weigh that information as part of the decision-making process, or cannot communicate their decision. A person with mental health problems who is in debt is particularly vulnerable due to their (potential):

- Lack of money management skills
- A reliance on benefit income
- Fluctuations in income or inability to work.
- Unmet housing, care or treatment needs
- Poor communication skills
- A relationship breakdown

We have an immediate reporting feature that was scripted under guidance and training from the safeguarding team at Age UK.

If an interviewer becomes concerned over the respondent's wellbeing, they are trained to tell the respondent that they are concerned and ask them if they would like them to do anything with the information that they have shared. If they say yes, we offer them two choices:

1. We can pass the information back to our client for someone there to contact them.
2. We can provide details of organisations they can contact directly.

If option one is chosen, we confirm they give us permission to pass on their contact information along with a brief summary of what they have said to the client.

If the respondent expresses an immediate risk to themselves (or someone else), we ask if they intend to take any immediate action to harm themselves (or someone else). If they say yes, we try to obtain as much detail as possible, what they plan to do and where and when they plan to do it. We then advise them to contact 999 or offer to do it for them.

Signs we look out for when identifying vulnerability in customers:

- Do they ask you to speak up or speak more slowly?
- Do they understand what you are saying, or do they miss important bits?
- Do they appear confused about what is being discussed?
- Do they ask any unrelated questions?
- Do they keep wandering off the point in the discussion and talk about irrelevant things or things that don't make sense?
- Do they keep repeating themselves?
- Do they take a long time to answer questions or say that someone else deals with these things for them?
- Do they have a language barrier?

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Steps we take if we believe a customer may be vulnerable:

- We speak slowly, clearly and explain fully.
- We are patient and empathise where appropriate.
- We don't rush as it may sometimes take the customer time to consider their responses.
- We keep on the subject under discussion.
- We do not make assumptions about a customer's needs.
- We clarify understanding at every point and always ask if there is anything else they would like us to explain.
- We do not make assumptions that the person we are dealing with is sighted as they may be unable to read.
- We do not make assumptions that the customer we are talking to can hear everything we say as they may have a hearing impairment.
- We always remember that the customer we are speaking to may sometimes be forgetful or overly trusting.
- We understand that some customers may be lonely and welcome the opportunity just to talk to someone.
- We give the customer time to explain their circumstances fully and don't interrupt or appear impatient.
- We always ask if there is a better time to complete the survey as some customers may perform better at different times of the day.

If we identify a customer who may be in need of specialist advice which we are unable to offer:

We will refer them to, or we will seek guidance from an appropriate organisation such as:

- Money Advice Trust
- CAB
- Samaritans
- Age UK
- Alzheimer's Society
- Mind

Policy review

This policy shall be reviewed by the policy owner annually or immediately after a process change or a policy breach is known to have occurred.

Periodic reviews shall take into account feedback from management reviews, regulatory changes and audits. Changes to the policy must be approved by a senior executive then communicated to all previous persons or organisations with access to the policy. Refer below for the most recent review.

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History table

Date	Rev No	Changes	Reviewed By	Approved By	Training Y/N