



DMA advice: The charity trustee checklist

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Introduction

All good plans start with a list.

Designed to support the fundraising and charities sector, the below checklist is here as guidance to help your organisation better meet the needs of its donors and supporters.

The DMA Responsible Marketing Committee's Fundraising Taskforce have led this initiative, holding a workshop last year, which helped identify some of the challenges the industry was facing, producing the whitepaper: [Securing the future of one-to-one fundraising](#).

However, one of the key challenges to come out of the workshop was accountability for trustees.

And so, the DMA invited key people from across the sector to develop the charity trustee checklist; a practical and supportive piece to help trustees figure out their chain of accountability, and the top considerations they need to remember when carrying out their responsibilities.

The checklist

Use the below to answer the necessary questions about your data responsibilities and how to be more accountable.

1. Am I a trustee? If so, what are my responsibilities and legal obligations?

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Directors, board members, governors and committee members: trustees are in charge of a charity and are responsible for making sure it's doing what it was set up to do. You need to know your stuff; that includes everything from ensuring you are compliant with charity law requirements to dealing with accountability within the charity.

[Learn more here.](#)

2. What data does your charity hold and how does it currently use personal data?

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You need to consider whether supporters or beneficiaries would be happy with how your charity is currently using its data. Reflect on the crossover between the two and how you approach contact with these people. Creating a framework and policy for internal use is a great place to start.

[Help me develop a framework.](#)

3. What are your organisation's data policies and who is taking ownership of these policies? Do you need to appoint a Data Protection Officer (DPO)?

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It is vital that someone takes responsibility for your organisation's data policies and appointing a DPO could be the answer. If an internal employee is assigned this role, you must ensure the individual's existing role is compatible with the duties of the DPO, and that they have the support from decision makers in your company.

[Tell me more about DPOs.](#)

4. What training and education programmes are in place to ensure best practices across the charity?

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Educating your staff is absolutely everything, and there are plenty of opportunities for training out there. Empower your teams with knowledge around best practices so they can implement the changes required across your business,

[Find the right training for your organisation.](#)

5. At what stage in the business planning process do we consider the use of personal data? Is data protection an item for consideration at board meetings?

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Data protection needs to be a priority across the whole company, and that starts in the boardroom. As a trustee, it is your job to make sure discussions around data management in the charity are on all agendas, and in front of the decision makers who have the capability to affect change.

6. How are you measuring success? Do you have case studies to illustrate what good looks like?

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You are only good as your competitors, so find the case studies to pit yourself against, and then go one better than them. Having these to hand will help to incentivise, and inspire, as well as giving you a clearer understanding of where your charity sits in the industry.



Conclusion

All charities are run effectively, nimbly and with a unified strategic vision across all functions. This is led by example, from the board members and trustees to the supporters with buckets outside local supermarkets.

As such, it is integral that all necessary business, fundraising and marketing skillsets are represented at a senior level within charities, in order to set standardised best practices, define clear roles of responsibility and take real accountability as an organisation.

From the boardroom to the bucket, it is in this new era of data that the long-term health of many charities could be determined, so get in check today.



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About the DMA

The DMA is the professional association representing companies working in the UK's multi-billion pound data-driven marketing industry. Its vision is to create a vibrant future for Britain by putting 1-to-1-to-millions communication at the heart of business, even society: promoting organisation-customer relationships that are genuine, in touch with the individual's needs, inspiring, helpful and mutually beneficial.

It provides members with the strongest framework for driving success: the DMA code, unlimited legal advice, political lobbying, business-critical research, educational and networking events, niche tools and resources, the latest and most creative thinking and the greatest community of digital and direct marketing experts, leaders, shapers and creators to support and inspire.

For further information: www.dma.org.uk

