



Data Protection Health Check for Charities

Data Protection Health Check Template (Self-Assessment) designed for charities, aligned with UK GDPR and the Data Protection Act 2018. It's structured as a simple scored questionnaire, allowing organisations to identify gaps and flag areas for improvement.

Data Protection Health Check for Charities

Self-Assessment Checklist | UK GDPR & Data Protection Act 2018

Estimated time to complete: 20–30 minutes

Tick or score each question honestly.

Total Score: ___ / 30

Use results to identify areas for improvement or professional support.

SECTION 1: DATA INVENTORY & MAPPING (Max Score: 6)

Question	Score (0–2)	Notes
Do you maintain an up-to-date record of the personal data your charity collects and processes (e.g. donors, volunteers, service users)?	___	
Is the purpose of collecting each type of personal data clearly documented?	___	
Do you know where all data is stored (paper, cloud, third parties)?	___	

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Subtotal (Section 1): ___ / 6

SECTION 2: LAWFUL BASIS CHECK (Max Score: 6)

Question

Score (0–2) Notes

Have you identified the lawful basis for each data processing activity (e.g. consent, legitimate interests, legal obligation)?

Are you confident that you only use consent where it's required and freely given?

Have you documented your Legitimate Interests Assessments (LIAs), if applicable?

Subtotal (Section 2): ___ / 6

SECTION 3: PRIVACY NOTICES (Max Score: 6)

Question

Score (0–2) Notes

Do you have an up-to-date, user-friendly Privacy Notice available on your website and/or in print?

Is the Privacy Notice tailored to different groups (e.g. donors, service users, volunteers)?

Does it include all required GDPR elements (lawful basis, rights, retention, contact info, etc.)?

Subtotal (Section 3): ___ / 6

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SECTION 4: SUBJECT ACCESS REQUESTS (SARs) (Max Score: 6)

Question	Score (0-2)	Notes
Do you have a documented procedure for responding to Subject Access Requests (SARs)?	___	
Can you respond to a SAR within the legal timeframe (1 month)?	___	
Have staff/volunteers been trained to recognise a SAR and escalate appropriately?	___	
Subtotal (Section 4):	___ / 6	

SECTION 5: DATA BREACH RESPONSE (Max Score: 6)

Question	Score (0-2)	Notes
Do you have a Data Breach Response Plan or policy in place?	___	
Are staff/volunteers aware of how to report a data breach internally?	___	
Have you assessed which breaches must be reported to the ICO within 72 hours?	___	
Subtotal (Section 5):	___ / 6	

FINAL SCORE & INTERPRETATION

Your Total Score: ___ / 30



Score Range Health Check Result

0-10	● At Risk
11-20	● Needs Work
21-30	● Compliant (with caveats)

Recommended Action

Immediate attention needed – serious gaps in compliance
Some policies/processes in place, but improvement is needed
Solid foundation – review annually and stay updated

Optional Next Steps

- Book a **free 30-minute consultation** to review your results
- Request help drafting or reviewing policies (Subject Access Requests, Privacy Notice, Breach Plan, training guides)
- Subscribe to our mailing list for future freebies, offers and news