



| | |
|---|--|
| 1 | Central policy: trust-wide, applicable at Trust and school levels and therefore provided at ODST central level. |
|---|--|

Personal Data Retention Policy- Local Government Pension Scheme

| | | | |
|-------------------|-----------------------------|------------------|-----------|
| Original document | Pay and Personnel Committee | 28 February 2020 | Version 1 |
|-------------------|-----------------------------|------------------|-----------|

Statement of Intent

This document has been prepared by the Oxford Diocesan Schools Trust in its capacity as a scheme employer in the **Oxfordshire Pension Fund** (the "**Fund**") and sets out its policy on the retention of personal data relating to its employees who are members of the Fund.

This document should be read in conjunction with the ODST and Fund's privacy notices, which can be accessed at:

- <https://www.odst.org.uk/gdpr> and
- <https://www.oxfordshire.gov.uk/business/pensions/pension-fund/admin-and-performance>

Introduction

As data controllers, we are required by legislation to comply with the principles of data minimisation and storage limitation. Personal data we process:

- must be adequate, relevant and limited to what is necessary in relation to the purposes for which it is processed; and
- must not be kept in a form which permits identification of a data subject for longer than is necessary for the purposes for which the personal data is processed.

We are obliged to retain certain records (whether in hard copy or electronic form) for various periods of time because:

- we have a statutory obligation¹ to do so; and/or
- the information contained in those records may be necessary for the future (for example, questions may arise about the calculation of benefits either to be put into payment or that

¹ Scheme employers have a statutory obligation to provide information to the pension fund under regulation 80 of the Local Government Pension Scheme Regulations 2013.

have been paid in the past, and data that may be relevant to a possible legal claim needs to be kept until the period within which that claim could be brought has expired).

This document sets out the measures adopted by ODST to comply with the principles of data minimisation and storage limitation in relation to personal data that we hold and process for the purposes of the Fund.

Types of personal data we hold

We hold and process the following types of personal data in relation to our current and former employees who are Members of the Fund:

- Contact details, including name, address, telephone numbers and email address;
- Identifying details, including date of birth, national insurance number and employee and membership numbers;
- Contractual information, such as start dates, hours worked, post, roles and salary information, and any changes to these as necessary for the calculation of the Member's benefits in the Fund;
- Information relating to any periods of absence from work that result in a reduction to salary;
- For current employees, information about the Member's family, dependants or personal circumstances, for example, marital status and information relevant to the distribution and allocation of benefits payable on death in service;
- Information about the Member's health, for example, to assess eligibility for benefits payable on ill health, or where the scheme Member's health is relevant to a claim for benefits following their death;
- Information about a criminal conviction if this has resulted in the Member owing money to the Employer or the Fund and the Employer or Fund may be reimbursed from the Member's benefits.

Retention periods for personal data

In compiling our policy on the retention of personal data, we have taken into account the guidelines on the retention of personal data as set out by / in:

- Information and Records Management Society;
- The National Archives;
- HMRC compliance handbook manual CH15400;
- ICO's retention policy;
- EU Article 29 Working Party guidance; and
- The Pension Regulator's code of practice 14 for public service pension schemes.

Data protection legislation requires that we retain personal data for no longer than is necessary in order to fulfil the purpose(s) for which it is processed. Given the long-term nature of pensions, we need to ensure that personal data is retained to:

- comply with our legal and regulatory obligations as a participating employer regarding the payment of pensions from the Fund; and
- deal with any questions or complaints that we or the Fund may receive about a Member's pension entitlement from the Fund.

Personal data will be retained for a maximum period of fifteen years after termination of

employment.

During any period when we retain personal data, we will keep that personal data up to date and take all reasonable steps to ensure that inaccurate data is either erased or rectified without delay. We will periodically review the personal data that we retain and consider whether it is still required; any personal data that we no longer require will be destroyed.

Member's and Beneficiary's rights

Beneficiaries form a wider category of people who receive benefits from the Fund, for example the active/deferred/pensioner member's spouse / child(ren) / dependants).

In certain circumstances a Member / Beneficiary has the right to:

- object to the processing of their personal data;
- restrict the processing of their personal data until any errors are corrected;
- transfer their personal data; or
- erase their personal data.

If the exercise of the Member's / Beneficiary's rights would prevent us from providing the personal data to the **Oxfordshire Pension Fund** in order for the payment or continued payment of a pension from the Fund, we will consider retaining a minimised version of that Member's / Beneficiary's personal data in order to fulfil our legal obligations.