

# Personal Data Privacy Statement

## Barnardo Staff Pension Scheme

### Why we have produced this statement

We, the Trustee Directors of the Barnardo Staff Pension Scheme, need to collect and process personal data to run the Scheme effectively. We are data controllers in relation to such personal data. We have always taken and will continue to take very seriously our duties as data controller of the personal data we receive concerning members, beneficiaries and potential beneficiaries of the Scheme.

We are required by law to give you certain information about the personal data we hold about you, how and why we use it and the safeguards that are in place to protect it. This statement is designed to give you that information.

**Please note:** when we've collected personal data from you in the past, we have done so in line with applicable data protection legislation.

### What is personal data?

The information we hold which relates to an identified or identifiable living person is known as 'personal data'. Personal data is subject to certain legal safeguards under the EU General Data Protection Regulation 2016/679 ("**GDPR**"), the GDPR as it forms part of the domestic law of the United Kingdom by virtue of the European Union (Withdrawal) Act 2018, and the Data Protection Act 2018 and all applicable legislation relating to privacy or data protection in force from time to time, including any statute or statutory provision which amends, supplements, consolidates or replaces the same, (in this statement, we will call this body of legislation the '**Data Protection Legislation**').

This statement applies to the personal data that we hold about Scheme members, their dependants and all other persons in respect of whom benefits are or may be payable under the Scheme. In this statement, we will call those individuals the 'Data Subjects'.

### What sort of personal data do we hold, why we hold it, and how we use it?

The categories of personal data that we may hold, collect, use, share and store in relation to a Data Subject, why we hold it, and how we use it are set out below:

| What data?                                                                                                                                                                                                                                                                                                                 | Why do we process it?                                                                                                                                                                                                         | What's our lawful basis?                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Personal details:</b> Your name, email address, telephone number, address, sex, marital and civil partnership status, copies of identification and similar documents (e.g. birth, marriage, civil partnership and death certificates, passport identity pages, decree absolute, pension sharing and earmarking orders). | We process this to contact you including in relation to your entitlements and options under the Scheme's governing provisions.                                                                                                | The lawful basis we rely on to conduct this processing is it is necessary for our legitimate interest to respond appropriately to you in a timely manner and ensure that you are provided with the best client services. |
|                                                                                                                                                                                                                                                                                                                            | We process this to maintain our records, to operate our business and provide our services, for statistical and financial modelling and to allow alternative ways of delivering your benefits, for example, through the use of | The lawful basis we rely on to conduct this processing is to fulfil our contractual obligations to you, or as necessary for our legitimate interest to ensure that you are provided with the best client services.       |

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|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | insurance products and transfers to or mergers with other pension arrangements.                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                    |
| <b>Employment details:</b> Your national insurance number, employment details, for example, length of employment with Barnardo's and salary history.                                                                                                                                                                                                                                                                                                                                | We process this to assess eligibility for, calculate and provide you (and, if you are a member of the Scheme, your beneficiaries upon your death) with benefits.                                                                                       | The lawful basis we rely on to conduct this processing is to fulfil our contractual obligations to you, or as necessary for our legitimate interest to ensure you are provided with the best client services.                                                                                      |
| <b>Scheme related details:</b> Your name, age, date of birth, gender, email address, telephone number, address, health data, marital status and information relevant to a claim for benefits following death (such as the name of your spouse or partner and other dependants) national insurance number, employment details, financial details, information about a criminal conviction, pension scheme details including scheme name, retirement age, contributions and benefits. | We process this to maintain our records, to identify your potential benefit options and, where relevant, implement those options.                                                                                                                      | The lawful basis we rely on to conduct this processing is to fulfil our contractual obligations to you, or as necessary for our legitimate interest to ensure that you are provided with the best client services.                                                                                 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | We process this to comply with our legal and regulatory obligations as Trustee of the Scheme.                                                                                                                                                          | The lawful basis we rely on to conduct this processing is to fulfil our legal obligations or to defend legal claims made against us.                                                                                                                                                               |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | We process this to respond to queries from you and others that may receive benefits as a consequence of your membership, and to address any actual or potential disputes concerning the Scheme.                                                        | The lawful basis we rely on to conduct this processing is to fulfil our contractual obligations to you, or as necessary for our legitimate interest to ensure we respond appropriately to you in a timely manner.                                                                                  |
| <b>Pensions Dashboards Programme:</b> pseudonymised user account identifiers (these are unique codes used instead of your name to protect your identity), pension identifiers (Pels) (reference numbers for each of your pension plans), consents and authorisations, and cryptographic tokens (these are secure digital keys that help keep your information safe online).                                                                                                         | We process this to (i) to link pensions dashboard find requests to you, (ii) to provide your pensions information to the requesting dashboard and (iii) to confirm your consent for us to share your pensions information with a requesting dashboard. | The lawful basis we rely on to conduct this processing is to fulfil our legal obligations under the Pensions Dashboards Regulations by enabling you to securely find and view your pensions information via your chosen pension's dashboard and your consent (which you provide to the dashboard). |
| <b>Financial details:</b> Your financial details, for example, bank account and tax details.                                                                                                                                                                                                                                                                                                                                                                                        | We process this for reference purposes, to pay pension benefits and to account to HMRC for tax.                                                                                                                                                        | The lawful basis we rely on to conduct this processing is it is necessary for our legitimate interest to allow us to improve our services.                                                                                                                                                         |

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| <b>Criminal convictions:</b><br>Information about a criminal conviction if this has resulted in you owing money to Barnardo's and where Barnardo's may be reimbursed from your benefits. | We process this to prevent, detect and investigate fraud, money laundering and other crimes.                                                                                                                                                                                                                                                                                                                        | The lawful basis we rely on to conduct this processing is to fulfil our legal obligations, or to defend legal claims made against us.                                                                                              |
| <b>Special categories of personal data:</b> Special categories' of particularly sensitive data, such as health information, genetics and biometrics (where used for ID purposes).        | We process this to identify your potential benefit options and, where relevant, implement and administer those options and to manage the Scheme's liabilities, including the entering into of insurance arrangements and selection of Scheme investments. We also process this personal data to identify whether a member is eligible for early-health retirement and to assess ill-health early retirement claims. | The lawful basis we rely on to conduct this processing is your explicit consent unless we can lawfully process this data for another reason permitted by Data Protection Legislation.                                              |
| All of the personal data listed above.                                                                                                                                                   | We process this in connection with any merger, reorganisation or other corporate activity concerning Barnardo's.                                                                                                                                                                                                                                                                                                    | The lawful basis we rely on to conduct this processing is consent (in relation to special categories of personal data) or it is necessary for our legitimate interest to allow us to change our business and improve our services. |

### Where do we get your personal data from?

Sometimes you may provide personal data directly to us, for example, following a direct request for information from us or by providing us with details about your dependants. Where you have provided us with personal data about other individuals, such as your spouse, partner, dependants or any other potential beneficiary, please ensure that those individuals are aware of the information contained within this notice.

We may approach third parties such as Barnardo's, former employers, regulatory authorities or tracing agencies to collect personal data (for example, we might seek information from some or all of those third parties in the event we are unable to contact you at the last address we hold for you and we need to get in touch with you about your Scheme benefits). We may also collect personal data from third parties that provide services in relation to the Pensions Dashboards Programme (for example, the Money and Pensions Service or the dashboard you have chosen to use). We may collect personal data even if an individual is no longer working for Barnardo's.

### Consent

Where we are relying on consent for processing of your personal data, you have the right to withdraw your consent to the processing at any time by notifying the Trustee Directors in writing. However, if you do not give consent, or subsequently withdraw it, the Trustee Directors may not be able to process the relevant information to make decisions based on it, including decisions regarding the payment of your benefits.

### How we store personal data

We follow strict security procedures for storing and sharing personal data, as required by Data Protection Legislation.

We store personal data for as long as we need for the purposes set out above or as required by applicable law. This will normally mean that we keep your personal data for as long as you are entitled to benefits from the Scheme and for so long afterwards as may be required to deal with any questions, complaints or claims that we receive about the administration of the Scheme. We may also retain your personal data for a longer period to comply with our legal and regulatory obligations.

### How we share personal data

Sharing your information with others:

We will keep your personal data confidential, but we may share it in certain circumstances, for the purposes set out in this Statement, with the following (who will have separate obligations under Data Protection Legislation):

| What personal data?                                                                                                                         | Who do we share it with?                                                                                                                                                                                                          | Why do we share it?                                                                                   | What's our lawful basis?                                                                                                                                                                                                                                                             |
|---------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Personal details, Employment details, Scheme related details                                                                                | Barnardo's, in its capacity as sponsor of the Scheme, Barnardo's advisers and, potentially, any organisation that merges with Barnardo's or acquires any of Barnardo's charitable functions.                                      | To manage our business operations.                                                                    | Please see the table above which sets out the lawful basis relied upon for processing this personal data. For the avoidance of doubt, processing includes "disclosure by transmission, dissemination or otherwise making available" and therefore covers sharing with third parties. |
| All the personal data listed above under the paragraph entitled: "What sort of personal data do we hold, why we hold it, and how we use it" | The Trustee's scheme administration services provider (currently Hymans Robertson LLP).                                                                                                                                           | To provide and administer products and to manage our business operations.                             |                                                                                                                                                                                                                                                                                      |
| All the personal data listed above under the paragraph entitled: "What sort of personal data do we hold, why we hold it, and how we use it" | Operators of any pension's dashboard related to the Pensions Dashboards Programme to which you choose to subscribe.                                                                                                               | To enable you to securely find and view your pensions information via your chosen pensions dashboard. |                                                                                                                                                                                                                                                                                      |
| Personal details, Employment details, Scheme related details, Criminal convictions                                                          | The Trustee's other service providers and agents including the Scheme's Actuary, auditor, legal adviser, investment consultant, trustee secretary, tracing agencies and each of those service providers' relevant subcontractors. | To provide and administer a product, or to comply with legal or regulatory obligations.               |                                                                                                                                                                                                                                                                                      |
| All the personal data listed above under the paragraph entitled: "What sort of personal data do                                             | Fraud prevention agencies.                                                                                                                                                                                                        | Where we are required to do so to comply with our legal obligations.                                  |                                                                                                                                                                                                                                                                                      |

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| we hold, why we hold it, and how we use it”                                                                                                 |                                                                                                                                                                                                        |                                                                                                            |  |
| Personal details, Employment details, Scheme related details                                                                                | The Trustee’s insurers.                                                                                                                                                                                | To apply for or claim on our insurance.                                                                    |  |
| Personal details, Financial details                                                                                                         | The Trustee’s banks.                                                                                                                                                                                   | Where we are required to do so to comply with our legal obligations.                                       |  |
| All the personal data listed above under the paragraph entitled: “What sort of personal data do we hold, why we hold it, and how we use it” | UK and overseas regulators, public bodies, Government bodies, the courts, dispute resolution bodies and law enforcement organisations in connection with their duties.                                 | Where we are required to do so to comply with our legal obligations and to manage our business operations. |  |
| All the personal data listed above under the paragraph entitled: “What sort of personal data do we hold, why we hold it, and how we use it” | Any other person or organisation in relation to restructuring the Scheme, as long as that person uses your information for the same purposes as it was originally given to us or used by us (or both). | To manage our business operations.                                                                         |  |

In some instances, advisers and service providers will be data controllers in their own right and will be directly responsible to you for their use of your personal data. They may be obliged under the Data Protection Legislation to provide you with additional information regarding the personal data that they hold about you and how and why they process that data. Further information may be provided to you in a separate notice or may be obtained from the advisers and service providers directly, for example, via their websites.

In addition, where we make Scheme investments or seek to provide benefits for Scheme members in other ways, such as through the use of insurance or pension scheme mergers, then we may need to share personal data with providers of investments, insurers and other pension scheme operators.

In each case, we will only do this to the extent that we consider the information is reasonably required for these purposes.

We won’t share or transfer personal data to third parties for marketing purposes.

### Transferring data overseas

We, or fraud prevention agencies, may transfer your personal data outside the United Kingdom (UK). If this happens we, or the fraud prevention agencies:

- are required to ensure that the organisations to which we transfer your personal data apply an equivalent level of protection as that given in the UK; and
- are required to impose contractual obligations on the recipients of that personal data to protect your personal data to the standard required in the UK, and

- may require the recipient to subscribe to international frameworks intended to enable secure data sharing.

If we transfer your personal data, we may transfer it to a country deemed by the UK Government to provide adequate protection of your personal data or where you have consented to the transfer.

If we transfer your personal data outside the UK in other circumstances (for example because, by law, we have to reveal the information), we will make sure that sharing the information is lawful.

You can request copies of the appropriate safeguards that we have in place by contacting us (see Contact Us below).

## Your rights

You have rights concerning the way that we use your personal data. You have the right to:

- request that we send you (or a nominated third party) a copy of the personal data that we hold about you
- request that we correct or erase any incorrect or incomplete personal data that we hold about you (we will correct any personal data that we believe is incorrect or incomplete)
- request that we stop using your personal data (we will do so where there is no legal reason for us to continue to hold or use that personal data)
- object to any automated decision making
- ask us to transfer a copy of your personal data to you or to another service provider or third party, where technically feasible, and
- withdraw any consent that you have given to our use of your personal data.

Please note that the rights set out above are all subject to the rights of the Trustee to continue to hold or use personal data where the Trustee are required to do so for a legitimate purpose such as administering benefits under the Scheme or where they are otherwise, for any legal reason, required to continue to hold or use your personal data.

To exercise any of the rights set out above, or to discuss any other issue or complaint you may have in relation to your personal data, please **contact us** as follows:

Post: The Barnardo Staff Pension Scheme Administration Team  
Hymans Robertson LLP  
45 Church Street  
Birmingham  
B3 2RT

Telephone: 0121 212 8188

Email: barnardos@hymans.co.uk (Please add 'For the attention of the Trustee in the subject line of your email.)

## Making a complaint to the Information Commissioner's Office

If you are not satisfied with our response to any query you raise with us, or you believe we are processing your personal data in a way that is inconsistent with the Data Protection Legislation, you can complain to the Information Commissioner's Office. Their contact details are:

Post: Information Commissioner's Office, Wycliffe House, Water Lane,  
Wilmslow Cheshire SK95AF

Tel: 0303 123 1113

Website: [www.ico.org.uk/](http://www.ico.org.uk/)

Please note that the personal data we hold is used to administer Scheme benefits and we may from time to time ask for further information from members and beneficiaries for this purpose. If you do not provide such information when requested or ask that your personal data we already hold is deleted or restricted, this may affect the payment of benefits from the Scheme. In some cases, it could mean the Trustee are unable to put your pension into payment or have to stop your pension (if already in payment).

### **Changes to this Statement**

**This personal data privacy statement was last updated in September 2025.**

**From time to time, we may make changes to this Statement and related policies or procedures. We expect such changes to be rare. We'll let you know of any changes when necessary and the date on which they take effect.**