The Whiteley Homes Trust

Subject Access Report Policy

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Review Period	Every three years or sooner following legislative, regulatory or organisational change
Next Review Date	July 2029
EIA	Yes

Review Tracker

Review Date	Reviewed by	Changes Made	Approved by	Approved date	Version
July 2026	**Director of Finance, IT and People**	**New policy developed to establish the Trust's framework for responding to Subject Access Requests, supporting openness, transparency, good governance and compliance with UK data protection legislation and the Regulator of Social Housing's Transparency, Influence and Accountability Standard.**	**FARC** **RECC** **Main Board**	**6/8/26** **6/8/26** **15/9/26**	**1.0**

1. Introduction

At The Whiteley Homes Trust ("the Trust"), we are committed to being open, transparent and accountable in the way we collect, use and protect personal information.

Residents, employees, volunteers, Trustees and others trust us with information about them every day. We recognise that this information is personal and that everyone has a legal right to understand what personal information we hold, why we hold it and how it is used.

The Trust is committed to ensuring that individuals can exercise their rights under UK data protection legislation fairly, consistently and without unnecessary barriers. We will respond to Subject Access Requests promptly, professionally and in accordance with the principles of openness, accountability and respect.

As a Registered Provider of Social Housing, the Trust recognises that transparency is fundamental to maintaining residents' confidence. Effective management of Subject Access Requests supports the Regulator of Social Housing's **Transparency, Influence and Accountability Standard** by ensuring residents can access information about themselves, understand decisions that affect them and have confidence that their personal information is handled responsibly.

The Trust is equally committed to protecting the privacy and rights of other individuals. While we seek to provide as much information as possible, we will ensure that personal information belonging to third parties and information protected by legal exemptions is managed appropriately.

This policy establishes the Trust's strategic framework for managing Subject Access Requests and should be read alongside the Trust's:

- Data Protection Policy
- Information Governance Policy
- Data Retention and Disposal Policy
- Privacy Notices
- Records Management Policy
- Information Security Policy
- Complaints Policy
- Code of Conduct
- Equality, Diversity and Inclusion Policy

Together these documents form the Trust's **Information Governance Framework**.

Our Commitment

When individuals ask for their personal information, we will:

- ✓ Make it easy to make a request
- ✓ Treat your request fairly and respectfully
- ✓ Keep you informed throughout the process
- ✓ Respond as quickly as possible and within legal timescales
- ✓ Explain any information we cannot provide and why
- ✓ Protect your privacy and the privacy of others
- ✓ Learn from feedback to continually improve

2. Scope of Applicability

This policy applies to everyone involved in processing personal information on behalf of The Whiteley Homes Trust.

It applies to all individuals engaged by the Trust, including employees, agency workers, bank workers and volunteers. Throughout this policy these groups are referred to collectively as **employees** for clarity and ease of reference.

It also applies to:

- Trustees
- Contractors
- Consultants
- Professional advisers
- Temporary employees
- Third-party service providers processing personal data on behalf of the Trust
- Anyone authorised to procure or commit expenditure on behalf of the Trust

The policy applies to Subject Access Requests made by any individual whose personal data is processed by the Trust, including:

- Residents and members of their households
- Applicants for housing
- Former residents
- Employees
- Former employees
- Volunteers
- Trustees
- Contractors
- Job applicants
- Members of the public
- Any other individual whose personal information is held by the Trust

A Subject Access Request may be made verbally, in writing, electronically or by any other means. Individuals are not required to complete a specific form or refer to UK GDPR when making a request.

This policy applies to personal information held in any format, including:

- Housing management systems
- Financial systems
- Personnel records
- Paper files
- Emails
- Electronic documents
- CCTV recordings
- Photographs

- Audio recordings
- Mobile devices
- Cloud-based systems
- Archived records

The Trust's legal responsibilities under this policy are determined by UK data protection legislation and apply regardless of where personal information is stored.

3. Purpose

The purpose of this policy is to establish a clear, consistent and proportionate framework for responding to Subject Access Requests and protecting individuals' information rights.

The objectives of this policy are to ensure that:

- Individuals are able to exercise their legal right of access to their personal information.
- Subject Access Requests are handled fairly, consistently and within statutory timescales.
- Personal information is processed lawfully, fairly and transparently.
- Appropriate governance arrangements are maintained to oversee compliance with data protection legislation.
- Residents can access information about themselves easily and without unnecessary barriers.
- Requests are managed proportionately, balancing openness with the privacy rights of others.
- Confidential information belonging to third parties is protected appropriately.
- The Trust maintains accurate records of Subject Access Requests and responses.
- Employees understand their responsibilities when handling requests.
- Lessons learned from Subject Access Requests, complaints, audits and regulatory developments are used to strengthen information governance arrangements.
- The Trust maintains compliance with current legislation, regulatory standards and recognised good practice.

By embedding these principles throughout the organisation, the Trust aims to strengthen transparency, build confidence and trust, and ensure that personal information is managed responsibly throughout its lifecycle.

4. Legislative and Regulatory Framework

The Trust manages Subject Access Requests in accordance with all relevant legislation, regulatory requirements and recognised good practice.

Primary Legislation

- UK General Data Protection Regulation (UK GDPR)
- Data Protection Act 2018
- Human Rights Act 1998
- Equality Act 2010
- Freedom of Information Act 2000 (where relevant)

- Privacy and Electronic Communications Regulations (PECR)

Regulatory Expectations

The Trust recognises the expectations established by:

- Regulator of Social Housing – Transparency, Influence and Accountability Standard
- Information Commissioner's Office (ICO)
- Housing Ombudsman Complaint Handling Code
- Regulator of Social Housing – Neighbourhood and Community Standard (where requests relate to housing services)

Supporting Guidance

The Trust will have regard to recognised guidance including:

- Information Commissioner's Office guidance on the Right of Access
- ICO Accountability Framework
- ICO guidance on data protection and housing providers
- National Housing Federation guidance
- Chartered Institute of Housing good practice
- Sector good practice published by recognised housing associations

Governance and Assurance

The Board retains overall responsibility for ensuring that the Trust has appropriate governance arrangements for information governance and data protection.

The Chief Executive has overall organisational accountability for compliance with data protection legislation.

Operational responsibility is delegated to the Director of Finance, IT and People, supported by the Trust's appointed Data Protection Officer (or external Data Protection Adviser where applicable), who provides specialist advice, oversight and assurance.

The Trust's governance framework supports effective management of Subject Access Requests through:

5. Subject Access Request Principles

The Trust manages Subject Access Requests in accordance with the following principles.

Openness and Transparency

We will make it easy for individuals to understand their information rights and to request access to their personal information.

Fairness

Every request will be considered fairly, objectively and without discrimination. We will not disadvantage anyone for exercising their legal rights.

Accessibility
Subject Access Requests may be made verbally or in writing and we will provide reasonable assistance to anyone who needs help making a request, including residents who may be vulnerable or require additional support.

Timeliness
We will respond to Subject Access Requests without undue delay and normally within one calendar month, unless an extension is permitted by legislation.

Privacy and Confidentiality
While seeking to provide maximum transparency, we will protect confidential information relating to other individuals and apply relevant legal exemptions where appropriate.

Accuracy
We will make reasonable efforts to ensure the information we provide is accurate, complete and reflects the personal information held by the Trust at the time the request is processed.

Accountability
The Trust will maintain records of Subject Access Requests, monitor compliance with statutory timescales and use performance information to improve our services and strengthen information governance.

Proportionality
The Trust will adopt a pragmatic and proportionate approach to handling requests, avoiding unnecessary bureaucracy while ensuring compliance with legal requirements and protecting individuals' rights.

Continuous Improvement
We will learn from Subject Access Requests, complaints, audits, regulatory developments and feedback to continually improve how we manage personal information and support transparency.

6. Making a Subject Access Request

The Trust aims to make it straightforward for individuals to exercise their right of access to personal information.

A Subject Access Request (SAR) is a request made by an individual (or someone acting lawfully on their behalf) to access personal information held by the Trust.

A request does not need to:

- Refer to "UK GDPR" or "Subject Access Request"
- Be made using a specific form
- Be submitted in writing

Requests may be made:

- In person
- By telephone
- By email
- By letter
- Through a representative authorised to act on the individual's behalf

The Trust encourages written requests wherever possible, as this helps ensure requests are understood and processed promptly. However, individuals will not be required to complete a particular form before their request is accepted.

Where a request is unclear, the Trust may seek clarification before responding. The statutory response period will begin once sufficient information has been received to identify the information being requested.

Where appropriate, the Trust may ask for reasonable proof of identity before releasing personal information. This helps protect individuals from unauthorised disclosure of their personal data. Where someone is acting on behalf of another individual, the Trust will require appropriate evidence of authority to act, unless another lawful basis applies.

The Trust will provide reasonable assistance to anyone who requires support in making a request, including residents who may be vulnerable, have communication needs or require information in an alternative format.

7. How the Trust Responds

The Trust is committed to responding to Subject Access Requests promptly, fairly and in accordance with statutory requirements.

Acknowledgement

Where practicable, the Trust will acknowledge receipt of a Subject Access Request and explain the next steps in the process.

Timescales

The Trust will normally respond within **one calendar month** of receiving the request and confirming the identity of the requester (where verification is required).

Where permitted by legislation, the Trust may extend this period by up to **a further two months** if a request is particularly complex or if multiple requests have been received from the same individual.

If an extension is required, the individual will be informed within the original one-month period together with the reasons for the delay.

Information Provided

Where a request is valid, the Trust will normally provide:

- Confirmation that personal information is being processed
- A copy of the personal information requested
- Information explaining:

- Why the information is processed
- The categories of personal information held
- Who information may be shared with
- How long information is retained
- The individual's data protection rights
- The right to complain to the Information Commissioner's Office

Information will normally be provided electronically unless another format is requested or more appropriate.

Information That May Not Be Disclosed

While the Trust supports openness and transparency, some information may be withheld where legislation permits. Examples include:

- Information relating to another individual
- Legally privileged information
- Confidential references
- Information subject to statutory exemptions
- Information where disclosure would prejudice the rights and freedoms of others

Where information has been withheld or redacted, the Trust will explain the reasons unless prohibited by law.

Requests Relating to CCTV

Where CCTV images contain identifiable third parties, the Trust will consider whether disclosure is appropriate and may redact, blur or withhold images where necessary to protect the rights of others.

Requests from Representatives

Requests made by solicitors, family members, attorneys, deputies or other representatives will only be processed where the Trust is satisfied they have the appropriate legal authority to act.

8. Fees and Administrative Charges

The Trust believes individuals should normally be able to access their own personal information free of charge.

Accordingly, the Trust will not normally charge a fee for responding to a Subject Access Request. However, under UK GDPR, the Trust may charge a reasonable administrative fee or refuse to act where a request is manifestly unfounded, manifestly excessive; or repetitive.

Where a reasonable fee is appropriate, it will reflect the actual administrative costs incurred in:

- Locating information
- Reviewing records
- Redacting third-party information
- Producing additional copies
- Printing and postage where specifically requested

The Trust's standard administration charges are:

Service	Charge
Electronic response	Free
First paper copy (up to 50 pages)	Free
Additional paper copies	20p per page
Postage (where requested)	Actual Royal Mail cost
USB or encrypted storage device (where specifically requested)	Actual cost (normally £10)
Manifestly unfounded or excessive requests	Reasonable administrative fee based on actual costs

9. Roles and Responsibilities

Effective management of Subject Access Requests depends upon clear accountability throughout the organisation.

Board

The Board has overall responsibility for ensuring the Trust maintains appropriate governance arrangements for information governance and compliance with data protection legislation.
The Board receives assurance that appropriate policies, controls and resources are in place to support compliance.

Chief Executive

The Chief Executive is accountable for ensuring the Trust has appropriate organisational arrangements, resources and leadership to comply with data protection legislation.

Director of Finance, IT and People

The Director of Finance, IT and People is responsible for:

- Overseeing implementation of this policy
- Ensuring appropriate systems and resources are available
- Monitoring compliance
- Reporting significant risks or breaches to the executive team and board where appropriate
- Promoting continuous improvement

Data Protection Officer (or appointed Data Protection Adviser)

The Trust's appointed Data Protection Officer (or external adviser) will:

- Provide independent advice
- Support complex Subject Access Requests
- Advise on exemptions and redactions
- Monitor compliance
- Provide guidance and training
- Liaise with the Information Commissioner where appropriate

Directors, Heads of Service and Managers

Directors, Heads of Service and Managers are responsible for ensuring:

- Records within their service areas are maintained appropriately
- Requests are responded to promptly
- Employees understand their responsibilities
- Relevant information is identified and provided within agreed timescales

Employees

All employees have a responsibility to:

- Recognise Subject Access Requests
- Forward requests promptly to the appropriate manager/Head of Service
- Protect confidentiality
- Maintain accurate records
- Complete mandatory data protection training

Failure to comply with this policy may result in disciplinary action.

10. Monitoring, Assurance and Reporting

The Trust will monitor the effectiveness of this policy to ensure compliance with legal requirements and support continuous improvement. Performance indicators will include, where appropriate:

- Number of Subject Access Requests received
- Compliance with statutory response times
- Requests requiring extensions
- Requests refused or partially refused
- Complaints relating to Subject Access Requests
- Information Commissioner's Office referrals
- Trends and lessons learned

The Trust will maintain a Subject Access Request register to support monitoring, audit and organisational learning.

Significant risks, themes, breaches or recurring issues will be reported through the Trust's governance arrangements where appropriate.

The Trust will use information from Subject Access Requests, complaints, audits, regulatory developments and data protection incidents to improve:

- Records management
- Information governance
- Employee training
- Resident communications
- Digital systems
- Service delivery

Regular review of this policy and associated procedures will ensure the Trust continues to meet legislative, regulatory and good practice expectations while maintaining residents' confidence in how their personal information is managed.

11. Equality, Accessibility and Reasonable Adjustments

The Trust is committed to ensuring that everyone can exercise their information rights fairly and without unnecessary barriers. Subject Access Requests will be handled in accordance with the Trust's Equality, Diversity and Inclusion Policy and the Equality Act 2010. Where required, the Trust will make reasonable adjustments to enable individuals to make a request or understand the information provided. This may include:

- Providing information in alternative formats, such as large print, audio or accessible electronic documents
- Supporting individuals with communication needs
- Allowing an authorised representative or advocate to act on an individual's behalf where appropriate
- Providing additional assistance to residents who may be vulnerable or require support

The Trust is committed to treating every request fairly, consistently and without discrimination.

12. Policy Review

This policy will be reviewed every three years or sooner where there is:

- A significant legislative or regulatory change
- Revised guidance issued by the Information Commissioner's Office
- Changes to the Regulator of Social Housing's regulatory requirements
- Significant organisational change
- Findings arising from audits, complaints or data breaches
- Learning from subject access requests
- Changes in recognised sector good practice

The Director of Finance, IT and People is responsible for reviewing this policy and recommending any amendments to the Board.