



KNOWLEDGE AND INFORMATION MANAGEMENT STRATEGY 2025/28

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1 Summary

Good knowledge and information management helps us to better understand our customers' needs, maintain homes to a high standard, and manage risk more effectively. It also helps us plan, improve service delivery, and protect vital local knowledge.

This strategy sets out a clear framework for how Derby Homes will capture, manage, store, and use information to support our objectives. By treating data as a strategic asset, we can ensure our services are more efficient, responsive, and compliant with increasing regulatory demands.

It addresses common business challenges, such as siloed systems, inconsistent data quality, and reliance on outdated processes. Alongside our aims to invest more in our digital culture, it outlines a commitment to better governance, modern technology, and a culture that values information sharing and continuous improvement.

2 Introduction

- 2.1 This strategy represents a commitment by senior leaders to elevate, and advocate for, the importance of knowledge and information management.
- 2.2 The purpose is to implement a clear framework that directs the organisation as to how data should be captured, recorded, managed, stored and analysed, and establishes how knowledge and information supports and protects the organisation's objectives and obligations.
- 2.3 The intention is to create a sustainable culture that understands and appreciates the benefits and importance of knowledge and information management, and views data as a strategic asset that benefits the organisation and its customers.
- 2.4 Robust knowledge and information management is a fundamental requirement in the delivery of services. Data must be accurately captured and maintained to create information records that demonstrate compliance and therefore safety. This allows the organisation to tailor its services to the needs of its customers and informs the strategic future of the organisation supporting growth and innovation.

- 2.5 Understanding **our customers**, enables Derby Homes to personalise services, increasing satisfaction and minimising complaints. For instance, maintaining an accurate picture of a customer's needs helps to ensure they receive equitable service, and our processes and technology need to be capable of collecting, managing and effectively communicating that information whether such needs are short-term, long-term or permanent.
- 2.6 Understanding **the homes we manage**, allows Derby Homes to forward plan, both for future housing investment and the work needed to modernise and maintain homes to a decent standard. For example, capturing, transmitting and analysing data from stock condition surveys, informs both the current stock profile and informs future planned works.
- 2.7 Understanding **our services and delivery**, allows Derby Homes to work safely and efficiently, with the ability to mitigate risks before they occur. This can include factors such as knowing who is occupying the property, as well as understanding the available preventative measures or remedial works.
- 2.8 Derby Homes deals with a wide range of information, including tenant records, maintenance schedules, financial data, and compliance documentation. The Knowledge and Information Management (KIM) strategy seeks to overcome challenges such as:
- **Siloed Information:** Information often exists in isolated systems, departments, or with individuals, limiting cross-functional collaboration.
 - **Manual or Legacy Data Systems:** Some systems, e.g., spreadsheets, may be inefficient and lack the capacity for integration, leading to duplications, errors, and inefficiencies.
 - **Knowledge Loss:** As employees retire or leave, valuable institutional knowledge may be lost, impacting service continuity and quality.
 - **Regulatory Pressure:** Increasing regulatory demands (e.g., building safety, data protection) require better information management to ensure compliance, avoid penalties and critically, protect customers.
- 2.9 Derby Homes has an obligation to comply with UK laws and regulatory standards, including the Social Housing (Regulation) Bill 2023, the Building Safety Act 2022, the Regulator of Social Housing's Consumer Standards, the Ombudsman Code, Public Sector Equality Duty, Data Protection Act 2018, Freedom of Information Act 2000 and UK GDPR.
- 2.10 The Knowledge and Information Management strategy should be read in conjunction with; the Digital Strategy, Equity, Diversity and Inclusion strategy, the Data Protection Act policy, the Information Security and IT Acceptable Use Policy, the Anti-Fraud policy and the Communication guidelines.

3 Strategic Objectives

- 3.1 **Enhancing Service Delivery:** Improve the quality and efficiency of services provided to tenants, by ensuring timely access to relevant and accurate information.
- 3.2 **Supporting Decision-Making:** Enable data-driven decision-making through accurate, accessible, and up-to-date information, capturing context to improve understanding and engagement. Developing a single version of the truth through data and system consolidation, or data model development.
- 3.3 **Compliance and Risk Management:** Ensure that all knowledge and information management practices adhere to legal, regulatory, and data protection standards (e.g., UK GDPR).
- 3.4 **Encouraging Collaboration and Innovation:** Foster a culture of collaboration by promoting knowledge-sharing among staff, stakeholders, and customers whilst leveraging emerging technologies to improve services.
- 3.5 **Future-Proofing the Organisation:** Anticipate emerging trends and challenges in the social housing sector, using knowledge and insights to stay agile and resilient. Ensuring knowledge continuity through knowledge repositories and succession planning.

4 Delivery Pillar 1 – Knowledge Management

Establish a robust system for capturing, storing, and sharing of institutional knowledge that enables the transfer of know-how, understanding, and insights — including tacit knowledge (the knowledge that's hard to write down but crucial for effective action).

- 4.1 **Centralised Knowledge Repositories:** Create centralised knowledge bases that capture organisation know-how from different services. Forms of knowledge to include best practice, lessons learnt reports, directories of expertise for who to contact and why, 'how to' guide, business processes and procedures. These repositories should be easily accessible to staff and regularly updated.
- 4.2 **Knowledge Sharing Culture:** Encourage knowledge-sharing through peer-learning initiatives such as communities of practice, mentoring programs or shadowing activities. These initiatives could include coaching, storytelling and leading by example. Other activities include knowledge retention sessions to capture knowledge of departing employees before they leave and increased use of lessons learnt workshops to understand what went well, what didn't go so well and why.
- 4.3 **Staff Training:** Develop training programmes for knowledge management and review existing policies and procedures for knowledge capture that include 'the why' as well as 'the what'. Provide continuous training for staff on using knowledge systems effectively and encourage the use of best practices for knowledge documentation.

5 Delivery Pillar 2 – Information Management

Organise information and information systems to optimise the delivery of structured information for reliability, availability and compliance whilst maintaining oversight of information assets.

- 5.1 **Identify and Classify Data:** Catalogue each data asset in a business-friendly information asset register, detailing its name, description, asset owner, location and retention period. Increasing visibility of data assets and assigning ownership increases awareness of the value of data assets.
- 5.2 **Progress Single System strategy** (*unless industry data standard adopted, see section 6.1 below): Encourage siloed services to adopt the existing housing management system for the broader organisational benefits. Migrate remaining line of business software into the housing management system such as Health & Safety and Homelessness to deliver a single version of the truth. Increase the scope of communication between existing specialist software solution for better information transmission.
- 5.3 **Migrate Internal Document Management System:** The existing internal document management system was not configured for Derby Homes and failed to deliver the potential benefits regarding document retention and discovery. Migrating to a properly configured solution will realise these benefits.
- 5.4 **Enhance Information Provision Platforms:** Website content has become out of date and is need of review and replacement to ensure accurate information is being communicated and to maximise the benefits of AI (see section 7.1 below). Additionally with the advent of better information sharing tools (see section 6.3 below) it is now possible to create and share dashboard that support performance communication and stakeholder oversight.

6 Delivery Pillar 3 – *Data Management*

Increase visibility and availability of accurate data to enhance decision-making and evidence regulatory compliance.

- 6.1 **Implement Data Standards:** Adopting industry data standards has the potential to a utopia scenario in which services can adopt the best of breed technology and integration becomes a simple plug and play exercise. Further, benchmarking against other organisations provides a truer reflection, supports transparency and streamlines system migrations. However, technology providers have yet to adopt industry standards and integrations are widely limited. Some value remains in creating internal consistency of words and phrases to avoid confusion and recording data fields used within integrations assists in tracking information flows and therefore preventing unintended consequences from solution change.
- 6.2 **Data Quality Assurance:** Devising and adopting a core set of data principles delivers assurance around data quality in terms of accuracy, compatibility, timeliness, completeness and availability. Data owners and delegated responsible officers should be assigned to ensure data principles are adhered to, to advise others on the significance of their data and provide training on data management where required. Exception reports to be developed so that data owners can remediate data quality issues.
- 6.3 **Enhance Data Visibility and Availability:** Invest in technology to integrate disparate data sources, enabling a “single source of truth” for tenant records, maintenance histories, financial reports, etc. This will help break down departmental silos and deliver a ‘single version of the truth’. Staff will require training on reporting tools and data analysis to fully exploit the tools available and to understand the importance of the ‘golden thread’.

7 Delivery Pillar 4 – *Digital Transformation and Innovation*

Leverage digital technologies to exploit data assets in the enhancement of service delivery, customer experience, and operational efficiency.

- 7.1 **Automation and AI:** The development and deployment AI bots to process telephone and chat general enquiries from available information source (see section 5.4 above) with ability to transfer to live chat with staff. Introduce automation to process routine tasks such as rent collection, Universal Credit verifications and personal housing plans. AI-powered systems can be used to analyse large volumes of tenant feedback more effectively than human and can predict maintenance needs.
- 7.2 **Tenant Self-Service Platforms:** Expand online portals for customers to access and maintain personal information and submit integrated service requests. Develop and deploy a facility to that allows customer to manage or cancel appointments. These improvements increase customer satisfaction and reduce administrative workloads.
- 7.3 **Mobile Workforce Solutions:** Equip field staff with mobile tools to access tenant information, report repairs, and track work orders in real-time. Provide staff with the ability to complete flat and estate inspections within the field. The changes will improve response times and service quality.

8 Delivery Pillar 5 – *Tenant and Stakeholder Engagement*

Use information and knowledge to improve communication and relationships with tenants, partners, and other stakeholders.

- 8.1 **Feedback Mechanisms:** Implement online functionality for surveys and feedback to capture tenant needs and concerns, ensuring that these insights are integrated into decision-making processes. Increase the capability of partner portals to support the provision of timely information. Share information about performance, key initiatives and strategy openly to increase transparency. Auditing of information flow should analyse where bottlenecks exist and include recommendation for resolution.
- 8.2 **Feedback Analysis:** Improve analysis around complaints and comments exploiting new technologies where available (see section 7.1 above). Develop action plans based on customer, partner and stakeholder feedback to improve services. Advanced Customer Relation Customer Relationship Management (CRM) systems may offer solutions in better collating all customer contacts to better appreciate the needs, experiences and journey of customers.
- 8.3 **Community Knowledge Hubs:** Partner with local organisations and services to provide more rounded support for customers. Promote and enhance online knowledge hubs where tenants can access useful information about housing services, community events, and resources (e.g., financial advice, support services). Ensure the content and resources remain relevant so that the knowledge hubs are effective and useful.

9 Monitoring and Evaluation

9.1 To get the intended results and benefits from the strategy, both the project's delivery and its ongoing use after implementation need to be monitored and evaluated for effectiveness. These steps are detailed below:

- Establish a programme to deliver the Knowledge and Information Management strategy.
- Project progress, risks, issues and assumptions will be managed through the existing Senior Management Team IT Development Monthly Meetings.
- Each project within the programme will be responsible for creating key performance indicators (KPIs) that measure the continued success of the deliverables after completion of the project.
- Conduct quarterly reviews to track progress and address challenges.
- Gather feedback from staff and tenants to ensure alignment with organisational goals.

10 Appendix one: Definitions

Data are individual facts, figures, signals or measurements that become information through structuring, categorising or combining typically within an IT system.

Knowledge is organised, contextualised, and actionable. It's about understanding, insight, skills, and application. Knowledge is often tacit so difficult to write down and encompasses 'know how' developed through experience.

Information Management is the structured process of creating, storing, using, and sharing data to support the organisation's objectives. It ensures data is reliable, accessible, and actionable.

Knowledge Management is the systematic process of capturing, organising, sharing and leveraging knowledge within an organisation to enhance decision-making, efficiency and innovation. It encompasses activities such as best practice, mentorship, succession planning and sharing experiences.

Knowledge and Information Management is distinguished from record-keeping, emphasising its broader scope, which includes proactive risk management, legal compliance, and service optimisation. However good record-keeping practices remain vital in ensuring data accuracy and compliance with data protection regulations.

11 Appendix two: Data Asset Owners

The table below captures a broad view of the existing data assets, their respective data owner and responsible officer.

Data Asset	Data Owner	Responsible Officer
Tenancy Management	Head of Housing Management	Housing Services Manager
Housing Application Management	Head of Housing Options and Homelessness	Social Housing Options Manager
Homelessness Management	Head of Housing Options and Homelessness	Homelessness Manager
Leaseholders Management	Head of Income and Finance	Leasehold Manager
Private Rented Sector Management	Head of Housing Options and Homelessness	Private Rented Sector Manager
Repairs	Head of Repairs	Day To Day Repairs Manager
Capital Works	Head of Capital Works	Contracts Manager
Planned Maintenance	Head of Capital Works	Planned Maintenance Manager
Gas Servicing	Head of Repairs	Gas Contract Manager
Electrical Periodic	Head of Repairs	Electrical Contracts Manager
Rent Management	Head of Income and Finance	Rental Control Manager
Income Recovery	Head of Income and Finance	Income Manager
Asbestos Management	Head of Corporate Services	Health and Safety Manager
Fire Risk Assessments	Head of Corporate Services	Health and Safety Manager
Anti-Social Behaviour Management	Head of Housing Management	Anti-Social Behaviour Manager
Supply Chain Management	Head of Repairs	Supply Chain Contract Manager
Void Management	Head of Repairs	Contracts Manager Voids Repairs & Public Buildings & The Fire Prevention Team
Procurement	Head of Corporate Services	Lead Procurement Officer