



# **Knowledge and Information Management Strategy 2025 -2030**

This strategy was produced in 2026 and is version XX

This strategy was adopted by Council on xxxx

**Review Frequency:** MDH will review this strategy every 5 years and as required to address legislative, regulatory, best practice or operational issues. However the Head of Housing and Health is given delegated authority to make minor amendments to the strategy as required by legislative changes, formal guidance or local operational considerations

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## 1 Our Vision for Mid Devon Housing

- 1.1 Our vision is to create thriving communities by continuing to build new affordable social homes, while keeping our current homes in great condition. We believe that homes should be places of pride, safety and comfort where tenants feel respected and supported.
- 1.2 To achieve this, we must understand who lives in our homes and what challenges they face. By using knowledge and information effectively, we can build meaningful relationships with our tenants and tailor our services to meet their needs.
- 1.3 Maintaining and improving our existing homes can only be achieved with the correct consistent approach. When we manage our data well, we can make better decisions, deliver better outcomes and ensure our homes remain a place where people want to live.
- 1.4 We know things are always changing and resources can be limited, that's why we're committed to working smarter. Using our knowledge and information to continuously improve, adapt and deliver a high-quality service.

## 2 Introduction

- 2.1 Managing knowledge and information (KIM) is vital for Mid Devon Housing (MDH). It helps us collect, store, share, and use data about tenants, properties, finances, policies, and repairs. Good KIM helps us make better decisions and improve services.
- 2.2 Effective KIM is crucial to MDH's organisational success, enabling our services to effectively address risks, complaints, and resident needs.
- 2.3 This strategy sets out how we'll manage information to support good decisions, save money, and deliver better services.
- 2.4 Everyone who works with MDH data must follow the relevant legislation (Data Protection Act 2018 and UK General Data Protection Regulation (GDPR)), principles and practices outlined in this strategy to keep our information accurate, safe, and reliable.
- 2.5 Additionally, training and awareness programs are provided to promote compliance and understanding of data integrity principles.

## 3 Knowledge and Information Management Strategy Project Group

- 3.1 In August 2025, MDH established a dedicated KIM Strategy Group to drive improvements and review how we manage knowledge and information across the organisation.

- 3.2 The group was formed in response to growing recognition of the importance of robust KIM in delivering safe, efficient and tenant-focused services. The primary objective of this project was to assess MDH's current KIM practices, identify gaps and opportunities, and develop a robust, forward-looking strategy.
- 3.3 To ensure measurable progress, the group created an action plan which is reviewed monthly. This plan tracks key milestones, assigns responsibilities, and ensures that improvements are embedded successfully across teams and systems.

## 4 Purpose of the Strategy

- 4.1 This strategy will ensure our data is accurate, consistent, and secure, forming a reliable foundation for service delivery. It ensures adherence to established standards in all data-related processes, promoting data quality and reliability.
- 4.2 It helps us make good decisions and meet legal requirements.
- 4.3 It protects our data from being lost or misused and builds trust in how we manage information, both internally and with our tenants. As a key element of the broader data governance framework, this strategy plays a vital role in maintaining data integrity.

## 5 Key Challenges

- 5.1 The KIM group determined the following challenges for Mid Devon Housing:



## 6 Management Principles

### 6.1 Information as an Organisational Asset

Information is one of MDH's most valuable assets. It underpins every decision we make, every service we deliver, and every relationship we build with tenants. We will be guided by the following principles:

- Information is one of our most valuable assets that must be managed with care and purpose.
- We keep information in one main place and only copy it for backup and resilience.
- Data should be easy to combine with other sources to help us make decisions.
- Every piece of information has a designated owner and is managed responsibly.
- We only keep information as long as necessary, then dispose of it securely.
- Information must be accurate, relevant, and stored safely.
- Only people who need personal information to do their job can access it.
- We follow all laws and policies about information.
- We regularly review our practices to identify opportunities for improvement.

### 6.2 Commitments under this Strategy

In delivering this strategy, we will:

- Implement benchmarking metrics to support ongoing improvements in service delivery and data maturity.
- Explore opportunities to incorporate external data sources to enhance business intelligence, for example, NHS datasets and UK Census data to enhance our intelligence and to better understand tenant needs.
- Promote a culture of accountability and transparency in how information is managed across all teams.
- Provide training and support to ensure staff understand their responsibilities and feel confident in managing data effectively.

## 7 Action Plan

### 7.1 One of the key actions of the Project group was to implement an Action Plan to develop solutions to key challenges and monitor progress against the KIM strategy.

7.2 The plan serves as a live document which is reviewed regularly and is available for tenants and stakeholders to see. It guides the implementation of improvements across MDH's knowledge and information practices.

## 8 Benchmarking

8.1 MDH actively benchmarks its performance against other registered housing providers to ensure continuous improvement and sector alignment. We subscribe to **Housemark**, which provides comprehensive data and analytics to support this process. Regular benchmarking reports and housing performance data are reviewed by the KIM group to inform strategic decisions.

8.2 Our **Tenant Satisfaction Measures (TSM)** results are also benchmarked against other registered providers, enabling us to assess our performance in relation to sector standards and identify areas for enhancement.

## 9 Data Sources

9.1 MDH holds a wide range of data that supports the delivery of safe, efficient and responsive housing service. The following data is held by MDH:

- Property Asset Data – Includes all aspects related to the property, such as the date of the last survey, expected lifespan, and compliance safety check dates.
- Void Data – Covers void stages and associated void loss.
- Repairs – Encompasses all raised and scheduled repairs, including contractor details and related repair records.
- Tenancy Details (current and former) – Includes tenancy start date, tenancy type, administrative changes, and records of interactions with customers, such as tenancy support notes.
- Revenue Account Details – Contains payment method, payment dates, payment references, and direct debit details (including bank details with controlled access, where applicable), along with arrears stages and related notes.
- Personal Details of Household Members – Covers name, date of birth, national insurance number, contact details (and preferences), vulnerabilities, gender, marital status, nationality, languages, and warnings.
- Housing Advice Cases – Includes records of completed work and case notes.
- Planned Maintenance Programmes – Details scheduled maintenance activities.
- Devon Home Choice Applications and Supporting Evidence – Includes health records (with restricted access), identification, proof of income, bank statements, and proof of address.
- Vulnerable Adults – Identified through tenancy data analysis.
- Contractor Actions, Complaints, and Performance – Assessed through repairs data analysis.

## 10 Roles and Responsibilities

10.1 This strategy assigns roles and responsibility to ensure data accuracy, consistency and protection from unauthorised changes.

Role	Responsibilities
Head of Housing and Health	Responsible for all MDH data and its quality
Operations Manager Housing	Ensures data management is carried out correctly and that staff are trained
Housing Managers and Team Leaders	Check data processes and make sure staff follow the strategy
IT Personnel	Keep our systems safe
Policy Officer	Updates the strategy and keeps up with legal changes
Housing Employees	Must follow data entry and reporting rules

10.2 Everyone who handles data is responsible for the input, storage, retrieval, or management of data from any Council information system, whether manual or electronic.

## 11 Record Keeping

11.1 Keeping clear and accurate records is vital. It helps us make informed decisions, deliver services effectively, and follow the law. If we don't manage records properly, it can cause delays, poor service, and problems for our tenants. By following good record-keeping practices, we can build a stronger culture around data at MDH.

As part of delivering this strategy, we will:

Officer Responsibilities:

1. Staff must follow data rules – Everyone is responsible for recording information correctly and meeting our basic data standards.
2. Annual reviews – Staff performance reviews will include how well they manage data. Repeated non-compliance by staff will be addressed through appropriate action.
3. Third-party standards – Contractors and partners must also meet our data standards. Compliance will be assessed during procurement and through contract management.
4. Keep records up to date – Information should be recorded as soon as possible to avoid mistakes.
5. Focus on tenants – We'll make sure tenant information is accurate, especially around support needs or vulnerabilities. We'll use this data to improve services.

MDH Responsibilities:

1. Spot gaps – We'll proactively identify and address missing or incomplete data.
2. Share wisely – Teams will share relevant information to help improve decisions and services.
3. Act on breaches – Any data breaches will be reported and dealt with quickly in line with GDPR and internal protocols.
4. Protect personal data – We'll follow GDPR rules to keep sensitive information safe.
5. Go digital – We'll record information digitally by default, improving accessibility and efficiency.

6. Update FAQs – We'll keep the FAQs on our website current so tenants can find answers easily, reducing the demand on staff time.

## 12 Data Quality

12.1 High quality data is essential for accurate reporting, informed decision making and effective service delivery. When data is reliable, we can plan better, respond faster and deliver services that meet tenant needs. Poor quality data can lead to inefficiencies, miscommunication and non-compliance with legal and regulatory standards.

12.2 To assess and improve the quality of our data, MDH uses 6 key themes based on the Audit Commission's guide: *Improving Information to Support Decision Making*. These themes help the Council and its partners check the quality of the data and issues that may arise:

1. Accuracy – Is the data correct and free from errors?
2. Validity – Does the data measure what it's supposed to?
3. Reliability – Is the data consistent over time and across systems?
4. Timeliness – Is the data up to date?
5. Relevance – Is the data useful for and appropriate for its intended purpose?
6. Completeness – Do we have all the necessary data to make informed decisions?

12.3 Data that's Critical to Our Services

To deliver high-quality services, we need strong, reliable data. This means keeping our information organised and current. When our data is trustworthy, we can act with confidence.

In 2024, MDH ran a tenant census over 18 months called Getting to Know You, which provided additional information on 21.1% of tenant households. This includes details about protected characteristics, language needs, and support requirements.

According to the Quality and Safety Standard, the Council must have a clear and accurate picture of the condition of its homes. This helps us make sure homes are safe, well-maintained, and good quality. While our health and safety records are up to date, we've found that our data on the condition of homes was lacking—it's between 4 and 8 years old and not detailed enough. Addressing this gap is a priority to ensure homes are safe and meet quality standards.

12.4 Data That Helps Us Improve Services

By analysing data, we can spot patterns and identify issues early. This allows us to act before problems escalate. Setting up a central team to manage performance and business intelligence will help us do this consistently through data analysis, tracking improvements, and embedding a culture of evidence-based decision making across MDH.

As part of this strategy, we will:

1. Find out how tenants with protected characteristics, language needs, or support requirements prefer to be contacted—and use this information in large-scale communications like the annual rent review.
2. Set up a regular process to keep tenant data updated, especially around vulnerabilities and communication needs.
3. Make it standard practice to check this data before contacting tenants and adjust our approach accordingly—whether it's our own staff or contractors.
4. Carry out surveys to check the condition of all properties.

5. Create a plan to keep property condition data regularly updated.

## 13 Record Retention and Disposal

### 13.1 MDH complies with Mid Devon District Council Records Management Policy. Specifically:

Under data protection laws, it's important that records are disposed of in a controlled and documented way. Each service must have clear rules about which records can be disposed of and how this is recorded. As part of this strategy, MDH will make sure that:

- Records are reviewed and disposed of every year, following MDH's retention policy.
- The Council's rules for securely destroying confidential documents and digital media are followed.
- A record is kept of what has been disposed of and this documentation is stored.
- Any records that need to be kept permanently are sent to the Devon County Record Office, which is the official location for storing public records in Devon.
- When creating electronic records, a planned review or disposal date is included.
- Records that are part of a Subject Access Request are not destroyed—doing so is a criminal offence under the Data Protection Act 2018.
- Initial guidance will come from LG Inform Plus (an online subscription tool to assist local authorities in relation to data), but each service must confirm and follow this with input from management.

## 14 Training and awareness

### 14.1 Staff Responsibility for Managing Information

Staff are the first line of defence when it comes to collecting and protecting the data we hold. Although information management is covered during induction, not everyone feels confident in handling data—whether it's collecting, updating, or accessing it. Where needed, staff will receive extra training to improve their skills and help deliver this strategy successfully.

### 14.2 Access to Guidance and Mandatory Training

Clear guidance on how to manage information properly will be easy for all staff to access. Every officer must complete annual corporate e-learning courses on:

1. Data protection
2. Equality and diversity
3. Safeguarding

### 14.3 Using Data to Support Safeguarding

Data analysis plays a key role in helping us meet our safeguarding responsibilities. Following agreed procedures, we will share relevant information at multi-agency meetings and use it to make referrals to the right support services.

14.4 To support this strategy, we will:

1. Provide training to improve staff skills in managing and analysing data. We'll set clear standards, explain how they'll be monitored, and outline what happens if they're not followed.
2. Make sure all MDH staff complete the Housing Ombudsman's KIM e-learning course by the end of 2026.
3. Deliver training on record keeping to help staff make decisions based on accurate and reliable information.
4. Feed our role as a landlord—and the data we hold—into MDH's review of safeguarding policies and procedures.

## 15 Equality Impact Assessments

15.1 We understand how important KIM is for meeting our responsibilities under the Equality Act 2010. Our goal is to improve tenants' experiences by offering services that are more personalised, fair, and inclusive. We'll use the data we hold to spot where we need to make changes or act, and to understand how our policies might affect different groups of people.

15.2 MDH carries out an Equality Impact Assessment every time we create or update a strategy, policy, procedure, or service. This helps us make sure our decisions are fair and don't create barriers or disadvantages for any protected group—including people with disabilities—under the Equality Act 2010.

## 16 Summary of Additions and Strategy Amendments

The following strategy amendments have been made:

Date	Amendment Made	Amendment Authorised by