

MDH Knowledge and Information Action Plan 2026 – 2031

This action plan outlines the key recommendations from the MDH Self Assessment against KIM 2025. Each action includes an overview of the issue, a suggested timeframe, designated action owner and identified constraints.

Governance and Culture						
Ref	Action Description	Overview	Timeframe	Action Owner	Constraints	Progress Against Action
R1	Establish Cross-Departmental KIM Group and develop KIM Strategy		By Jan 2026	Head of Housing & Health	Competing priorities, availability of data leads	COMPLETE - A KIM Project Group was established October 2025
Implement a knowledge and information management strategy						
R2	Develop a KIM Action Plan		By Jan 2026	All Housing Managers and Team Leads	Competing priorities, budget constraints	Complete
R3	Develop Stock Condition data reporting and monitoring	We cannot evidence the physical condition of all our properties	By Dec 2026	Planned Maintenance Manager	Contractor compliance, system integration	ONGOING – DATA CONDITION SURVEYS STARTED AND EXTERNAL COMPANY TO START IN 2026 Over 500 surveys done 05/05. Data to be added to P&R meeting

R4	Implement a data integrity process for all performance reporting	There are no formalised procedures for ensuring data integrity		Finance & Information Manager	Resource constraints in Finance and Housing	NOT STARTED – ACTION TO BE REVIEWED WITH F&IM
R5	Implement a centralised data repository	MDH does not currently operate a centralised data repository. As a result, no single officer has access to a complete and integrated view of tenancy and property data		Operational Manager Housing/	Resource constraints in Finance and Housing combined with uncertainty in any local government reorganisation	NOT STARTED
R6	Equip all front line staff with tablets to enable them to update customer records	MDH will need to review system usability, expand device access for frontline staff, and explore opportunities for system integration to support real-time data management.		Team Leader Income/Allocations	Competing priorities, budget constraints	NOT STARTED
R7	Implement a digital improvement operating system	This would enhance the efficiency of frontline operations.		ESTATES MANAGER & F&IM	Competing priorities, budget constraints	NOT STARTED
R8	Increase and monitor volumes of tenancy inspections	This gap in information reduces our ability to proactively plan and schedule necessary works when properties become vacant, potentially impacting turnaround times and resource allocation.		Estates Neighbourhood Team Leader	Staff time, competing priorities	ONGOING – LOOKING AT TARGETED TENANCY Home Checks DEC 2025

R9	Introduce a process for recording and sharing void condition information	The process will ensure this visual evidence is accessible to Neighbourhood Officers and supports wider operational decision-making, a formal process is required to upload and store this data within the Orchard system.		Customer Manager/Policy Officer/PLANNED MAINTENANCE MANAGER	Staff time, competing priorities	NOT STARTED
R10	Implement a centralised tree database and inspection process	There is a need to implement a centralised database to record information on all trees located on our properties. This should include details of inspection dates and responsible personnel. Establishing a structured process for regular tree inspections is essential to maintaining tenant safety and ensuring compliance with health and safety standards.		Planned Maintenance Manager	Competing priorities, budget constraints	NOT STARTED
Benchmark against other organisations' good practice in knowledge and information management.						
R11	Complete CORE submission and embed benchmarking analysis into service planning	Aim to do the Annual CORE submission which includes TSMs, Extract Insight, Headline Financials, Employee Costs, Non-Pay Costs and Costs. This exercise was not fully		Finance & Information Manager	Resource constraints in Finance and Housing	Ongoing – Process being developed 2026/2027

		completed in 2023/24 and has not yet been done for 2024/25.				
Review safeguarding policies and procedures						
R12	Develop standardised safeguarding incident recording process	Although operatives receive annual safeguarding elearning there is no specific training on the processes required to report safeguarding issues.		Community Safety Officer/Policy Officer/HC - SG Champion to assist	Contractor compliance, system integration	NOT STARTED
Train staff on the requirements of the Equality Act 2010						
R13	Incorporate Equality Act 2010 training into mandatory programme	A formal request will be made to Mid Devon District Council's HR team to incorporate specific Equality Act 2010 training into the mandatory learning programme. This would ensure that all staff have a clear understanding of their responsibilities under the Act, particularly in relation to knowledge and information management.		CUSTOMER MANAGER/pOLICY OFFICER	HR capacity, contractor compliance	ONGOING – training is being sourced with external suppliers Dec 2025. Possible for training by legal services 05/05/26
R14	Extend equality training requirements to third-party contractors	Future contracts will include a mandatory provision for annual equality training, ensuring that all personnel working in MDH homes are equipped to deliver		Planned Maintenance Manager	Contractor compliance, system integration	ONGOING – NEW CLAUSES TO BE ADDED TO NEW CONTRACTS WITH REQUIREMENTS

		inclusive and compliant services.				
Review internal guidance around recording vulnerabilities						
R15	Implement agreed processes for operatives to add UDC's via the TSRO team	Further training is required to ensure that repairs operatives are capturing and Technical Support Team are updating vulnerabilities.		Customer Manager/REPAIR AND DISREPAIR MANAGER	Staff time, competing priorities	NOT STARTED
R16	Review historical UDC's	Where vulnerabilities are no longer relevant such as 'has covid' are present these needed to be reviewed and removed from the system to ensure that only current/relevant UDC are available. Confirmation that details of old UDC's and flags can be extracted from Orchard so that a project can be implemented to review and remove these if not relevant.		Finance & Information Manager/ALL MANAGERS	Staff time, competing priorities	Ongoing – data being looked at and redundant UDC's removed 05/05
R17	Review 3 rd Party Contracts and processes	Third party contracts will be reviewed and updated to include the minimum requirements required with regard to the reporting of vulnerability concerns with any contractors working in our homes. Formal processes		Planned Maintenance Manager	Contractor compliance, system integration	ONGOING – PROCESSES TO BE DEVELOPED WITH CONTRACTORS. Contracts being developed with NBS 05/05 which will enable

		will be required that vulnerabilities recorded by contractors are added to our systems and acted upon.				contracts to be updated to meet JCT 2024 editions
Develop organisational key data recording standard requirements that will ensure good records that support the business and demonstrate compliance with national standards						
R18	Adopt HACT and CIH data standards and embed into SLAs	MDH will need to review and adopt existing industry standards		Policy Officer/Planned Maintenance Manager	Contractor engagement, legal review	NOT STARTED
R19	Embed KIM minimum standards into all third-party SLAs	Once the MDH minimum standard has been developed it will be added to third party SLA's. Currently no industry standards are used with regard to the quality of data passing between third parties and MDH.		Planned Maintenance Manager	Contractor engagement, legal review	Ongoing – same as R17
R20	Implement a process that ensures tenant data held in DMS is moved to DMS archive when the tenancy ends	When a tenancy ends, records should be manually transferred to an archive where they are scheduled for automatic deletion after 12 years. In practice, this process is not consistently followed, and a formal procedure is needed to ensure tenancy records are properly monitored and archived.		CUSTOMER MANAGER/ALLOCATIONS TEAM MANAGER	Staff time, competing priorities	NOT STARTED
Have a clear categorisation system for ATIS/FOI requests						

R21	Develop FOI/SAR categorisation system and formal process	There is currently no categorisation system used by the corporate team but this may need to be considered at a local level along with the volumes of FOI/SAR requested received. There is no set process for dealing with SAR requests.		Finance & Information Manager	Staff time, competing priorities	NOT STARTED
Publish FAQs on websites and keep them updated						
R22	Create website content register and assign ownership	To improve governance, MDH will establish a formal register of all website content. Each article or page will be assigned to a responsible officer who will be required to conduct an annual review. This will ensure that published information is proactively maintained and aligned with current service standards and strategic priorities.		Customer Manager	Staff time, competing priorities	COMPLETED 12/02/2026
Review existing databases for capability and capacity to record those key data requirements						
R23	Review system viability and strategic considerations	Orchard is currently outdated and unsupported, with MDH signing a waiver to continue its use. This raises concerns about long-term viability and may		Operational Manager Housing	Financial constraints, uncertainty with local government reorganisation	NOT STARTED

		prompt broader discussions about system replacement, particularly in the context of any future local authority reorganisation or merger.				
R24	Encourage and support a cultural shift in staff towards recording information	There is a need to reinforce the importance of timely and accurate data recording across the service. Data management should not be viewed as a low-priority administrative task but as a critical component of service quality, compliance, and strategic planning.		All Managers	Staff time, competing priorities	ONGOING – DISCUSSIONS BEING HELD WITH STAFF
R25	Define user practices and data recording	There are inconsistencies in how staff use systems to record key actions.		All Managers	Staff time, competing priorities	ONGOING
Train staff on using systems						
R26	Develop and deliver KIM awareness training for all staff	MDH currently lacks a structured approach to training staff on data quality standards and the importance of timely record-keeping		All Managers/Policy Officer	Staff time, competing priorities	ONGOING
R27	Establish KIM champions in each service area	Will help to support a cultural shift in staff		Customer Manager	Staff willingness, role clarity	NOT STARTED
R28	Create central repository for KIM	Will help to embed data management principles into both onboarding and		Policy Officer	Platform selection, content development	NOT STARTED

	resources and guidance	ongoing professional development.				
Ensure databases are easy to interrogate and that the data can be extracted and used						
R29	Review Data Fragmentation and provide solutions for integrated system solutions	Property-specific data is stored in Integrator, which does not integrate with Orchard and is not accessible via Agile. This creates a fragmented data environment, limiting operatives' ability to view comprehensive property information while on site.		Operational Manager Housing	Financial constraints, uncertainty with local government reorganisation	NOT STARTED
Schedule appropriate sensitive information reviews						
R30	Implement a comprehensive data cleansing program	To include both Integrator & Orchard and shared drives. To establish clear procedures for data lifecycle management, and ensure all systems and storage locations are regularly reviewed for compliance and relevance.		ALL MANAGERS	Staff time, competing priorities	Ongoing – Integrator is cleansed on a regular basis. Stock condition surveys being added Orchard has not been data cleansed on a regular basis 05/05/26
Set out clear requirements of operatives before they are allowed to record an appointment as missed						
R31	Establish and document clear requirements	MDH currently lacks formalised procedures for recording missed appointments, both for		All repairs/estates managers	Staff time, competing priorities	Ongoing – procedures for both internal &

		internal operatives and third-party contractors. This absence of clear guidance presents a risk to service consistency, accountability, and performance monitoring.				external to be documented THC process to be documented
Conduct wastage analysis on missed appointments						
R32	Develop and implement waste analysis procedures	MDH should implement a comprehensive wastage analysis process across all relevant teams. This would enable data-driven decision-making and support the development of action plans to reduce missed appointments and optimise service delivery.		REPAIR AND DISREPAIR MANAGER	Staff time, competing priorities	NOT STARTED
Implement an automated appointment reminder system						
R33	Expand the existing automated notification system	To enhance service delivery, MDH should consider expanding its automated notification system to include multi-channel communication, real-time tracking, and tenant interaction capabilities. This would improve engagement, reduce missed appointments, and align with best practice in customer service.		REPAIR AND DISREPAIR MANAGER	Financial constraints, Staff time, competing priorities	NOT STARTED

R34	Include automated reminder requirement in 3 rd party contracts	The use of automated appointment reminders is not currently a requirement within third-party contracts. This presents an opportunity to strengthen service standards by including automated communication protocols in future agreements.		Planned Maintenance Manager	Contractor engagement, legal review	NOT STARTED
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