

# DATA STRATEGY 2023-26

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## 1 INTRODUCTION

- 1.1 This Data Strategy sets out Stockport Home's (SHG) approach to obtaining maximum value from one of SHG's most important assets, data; to achieve the Mission of "One Team, Transforming Lives." It provides a framework to outline how SHG will collect, manage, store, analyse and use data to influence achievement of goals, objectives and excellent customer service. This is further underpinned by the development of secure foundations for technology and focus on digital innovations.
- 1.2 Excellent customer experience is informed by valuable customer insight. Customer insight is key to delivering a personalised and tailored approach to customer service. Having strong data is the foundation to customer insight and ensuring SHG customers can influence decision making at every level.
- 1.3 Having the customer voice at the heart of data collection ensures that SHG supports customer experience excellence by ensuring accurate, informative record keeping informs services based upon customer preferences, sentiment and satisfaction. The ambition of this strategy is to create a holistic view of SHG customers using a 'one version of the truth' integrated approach to data management.
- 1.4 The Data Strategy aims to enable data informed decision making across the organisation. By valuing data as a strategic asset SHG can enhance customer experience, drive business growth, and create a culture where data is integral to delivery of excellent services. The objectives of this strategy create a golden thread from data collection through to operational consumption. They ensure each individual within the business understands their role in the delivery of good data management.

In addition, by seeking out best practice from partners within the sector and externally, it will provide a benchmark for continuous improvement, in addition to supporting efficiencies that can be achieved from shared learning.

## 2 BACKGROUND

- 2.1 The increasing demands, expectations and regulatory requirements on data, coupled with the development of modern, agile platforms that enhance the power of business insight, have resulted in SHG wanting to formalise a strategy that clearly sets out its approach and aspirations in relation to Data management. To aid this, an independent review was commissioned in 2022 to look at SHGs approach to Data management across the Group to help inform key areas of focus.
- 2.2 The Housemark review identified some gaps in Data Management at SHG relating to the following:
  - Consolidating the technology estate and creating improvements in data architecture

- Ensuring that the SHG customer experience is central to prioritising data related improvements
- Developing a framework for data governance and creating data standards and robust processes to ensure data is accurately recorded, secure and easily accessible
- Improving clarity around the organisational model for performance management, specifically in relation to data analytics
- The need for consistency in levels of data literacy across the business working towards improved ownership and accountability for data as a strategic asset

The objectives within this strategy will ensure the gaps identified are addressed by delivering the actions within the Data Management Action Plan (attached at Appendix 1)

### 3 CONTEXT

3.1 In 2023, SHG launched its new Business Plan which highlighted the recent shifts in operating environment, customer expectations and regulatory obligations. The Business Plan aims clearly set out that SHG aim to:

- Deliver excellent customer service, driven by customer feedback and experience
- Provide safe, sustainable homes in neighbourhoods where communities can thrive
- Contribute to making Stockport fairer by reducing inequality, poverty and supporting customers in all aspects of their lives
- Maximise resources through growth, efficiency, and business transformation
- Work collaboratively, influencing locally, regionally, and nationally to achieve more
- Be an inclusive great place to work, where our values shine through everyone and everything we do

Robust and accurate data is fundamental to evidence SHG are achieving these aims, meeting customer expectations, and preparing for significant changes in the regulatory environment for the Housing sector as a whole.

#### 3.2 National context

The social housing sector in the UK faces a number of external pressures as the outlook for housing providers remains challenging. Meeting Health and Safety requirements and the recently approved Social Housing Regulation Bill continue to set expectations of social housing providers in a financially demanding environment. In 2022 the Regulator of Social Housing warned boards that decision-making will be weakened by “failure to maintain data integrity or by data isolated in siloed systems”<sup>1</sup>, further supporting the need for

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<sup>1</sup> Regulator of Social Housing’s Sector Risk Profile 2022

providers to strengthen their approach to Data as a fundamental asset to their organisations.

Lessons learnt from the Grenfell Tower tragedy highlight how essential a golden thread of accurate, joined up information about housing stock is. In addition, following the tragedy in Rochdale, it has never been more important to ensure providers have 'one version of the truth' about customers, which links asset and customer data together to give the full picture when making decisions about service delivery.

The introduction of Tenant Satisfaction Measures by the Regulator of Social Housing, to assess how well providers are doing at providing good quality homes and services, as well as new legislation on Consumer Regulation coming into force in April 2024 demonstrates the regulatory influence being applied to mandate that organisations 'know' whether they are meeting their customer's needs. Good quality data is crucial to delivering well on these priorities and without the clear insight data delivers, it becomes increasingly difficult to manage assets and support customers to the highest standard.

The Housing Ombudsman (HoS) has recently published their spotlight report on Knowledge and Information Management (KIM), created due to increasing levels of failings by housing providers where one of the key factors is poor record keeping. Increased scrutiny in this area from HoS continues due to ongoing significant issues being found during complaint investigations. This report includes 21 recommendations for housing providers to follow to improve management of data, from creation through to how it is stored, used, and shared.

The HoS states within their report:

*"Without good information management, a landlord cannot adequately:*

- *Horizon-scan and identify risks*
- *Contingency plan*
- *Proactively address hazards (such as fire safety, asbestos and damp and mould)*
- *Fully comply with legal and regulatory requirements*
- *Ensure evidence-based practice, and*
- *Provide a high-quality service to residents."*

Delivering the objectives of the Data Strategy will address these requirements and will ensure SHG comply with the recommendations from this review.

### 3.3 Regional Context

The Greater Manchester Combined Authority (GMCA) vision for information is:

*“To create a better information ecosystem that realises the full potential of information; manages, shares, and uses information responsibly; helps tackle our most serious challenges; and supports Greater Manchester’s wider ambitions”*

This is supported by ten principles, three of which are key data centric principles:

- *Doing the right things with information*
- *Valuing information*
- *Information-led decision-making*

The GMCA’s Information Strategy sees success as *“working together to ensure that the right people have the right information at the right time, safely, securely, legally and ethically, enabled by consistent approaches, skills and inclusive engagement.”*

As a member of Greater Manchester Housing Providers (GMHP) Data and Information Governance Group, SHG share good practice and benchmark with other providers in Greater Manchester (GM) around data management. Learning from this group has informed the development of this strategy, in particular work completed as part of the development of the Greater Manchester Housing Providers Data Management Framework (DMF). This framework was published in June 2023 and aligns itself with the vision set out above in the Greater Manchester Information Strategy. The purpose of the DMF is to:

*“Embed data at the heart of our organisations and in every decision we make”*

SHG’s Data journey will embrace these ambitions and keep abreast of developments both nationally and regionally that will help SHG achieve its objectives for Data on the journey to excellence.

### 3.4 Local context

Stockport Council’s (SMBC) strategic vision for Data states:

*“We will put data at the heart of everything we do, promoting data as the second most important asset we have behind our people. We will use joined up data to innovate, supporting our digital transformation, generating insights that results in better decision making and improving value for money public services. We will switch from reactive to proactive service delivery, generating as much value as possible from our data and helping to create a more personalised experience for citizens who have trust in how we use their data.”*

SHG recognises the value of partnership with Stockport Council and through our Data Strategy will continue to support SMBC in the delivery of this vision for the residents of Stockport.

### 3.5 Wider Transformation Vision

To ensure alignment of upcoming strategic direction for multiple business areas, this Data Strategy has been put together in consultation with representatives from Technology, Digital and Business Transformation. Collectively, an overarching vision for transformation was established, with each business area having their own vision and themes to ensure clarity from the outset. The overarching transformation vision created as follows:

**“Transformation at SHG will enable insight led change, support a positive performance culture, and create efficient delivery for improved customer experience.”**

Individual visions for each of the business areas were put together to support this overarching vision and expand on each function’s aims and objectives.

The vision for the Data service is to have a focus on accuracy and clarity to continually improve customer experience:

**“SHG is a Data and Insight led organisation built on a single version of the truth approach that supports effective and efficient delivery, resource allocation and data informed decision making. Data is an asset and is core to service excellence, ensuring customer voice drives positive change”**

From each of the visions established, key themes for each business area have also been set out. These cover elements such as data warehouses, data quality, digital culture, automation and change management. Each of these themes and wider context can be found within the respective strategies.

- 3.6 Consultation with staff and managers has informed the development of this strategy. Staff have been consulted via individual Directorate Management Seminars and attendance at Colleague Voice to promote to the wider employee base.
- 3.7 The strategy is informed by customer feedback in the form of customer complaints where data is identified as an issue. Learning from complaints is critical to informing SHG’s approach to record-keeping and SHG’s ambition to create one version of the truth from a data perspective. Feedback from customer satisfaction and Tenant Satisfaction Measures (TSM’s) are also contributory factors, as any improvements to the way SHG manages data are intrinsically linked with improving the customer experience by enhancing customer insight. Accurate data management of customer preferences and demographics enable SHG to improve customer satisfaction by offering more personalised customer experiences.
- 3.8 Price Waterhouse Coopers (PwC), internal auditors for SHG completed an advisory audit of Data Governance / Quality at SHG following the Housemark review of data management, to provide assurance to Audit and Risk Committee (ARC) on the approach to delivery of the Data Management Action Plan. The findings from this audit have also informed the Strategy.

## 4 STRATEGIC OBJECTIVES & OUTCOMES

4.1 Five objectives have been created to deliver the vision for Data. These are:

- Continually improve customer experience using Data to inform decision making
- Improve Data Culture and Literacy across the business
- Improve Data Governance
- Develop an Analytics Operating Model
- Improve Data Architecture by enabling data integration

### **OBJECTIVE ONE: CONTINUALLY IMPROVE CUSTOMER EXPERIENCE USING DATA TO INFORM DECISION MAKING**

Continually improving customer experience is a key aim of SHG's Business Plan achieved by delivering excellent customer service, driven by customer feedback. Accurate, available and usable data is fundamental to the provision of personalised customer experiences. This approach is endorsed by the Housing Sector's Regulators, who make excellent record keeping a pre-requisite for housing providers to support 'finding their silences' and reducing 'blind spots' when delivering services to customers.

Accurate and complete data about SHG assets is also critical to ensuring excellent customer experiences. SHG have committed to providing safe and sustainable homes for customers to live in, which can only be achieved by having accurate and reliable asset data to inform investment decisions going forwards.

The relationship between data, Technology and Digital services are key component of delivering excellent customer services. Meeting the expectations of SHG customers in a fast-paced digital world requires a joined-up approach to improvement and collaboration at every level. Consultation with both areas of the business, under the overarching transformation vision has been completed. Joint visions for each area have been created, considering dependencies and impacts of future strategic directions on each separate area.

This objective sets out to ensure the strategy is driven by customer feedback and insight, to create an environment where good quality data is the platform from which customer focussed decisions can be made.

### **ACTIONS**

- Action 1.1      Develop customer feedback and satisfaction mechanisms in conjunction with customer facing teams to ensure collection of informative customer insight data is maximised across the business

- Action 1.2 Implement systems for real-time monitoring of customer interactions and feedback
- Action 1.3 Use data to identify common customer issues or complaints and support the development of processes to proactively address these issues
- Action 1.4 Ensure that customer data is handled securely and in compliance with Data Protection regulations
- Action 1.5 Investigate the potential for collection of customer psychographic data as a qualitative methodology for enhancing customer persona's (use Cx Feedback and work with external providers to collect data about values, goals, interests and lifestyle choices)
- Action 1.6 Align the data Strategy with Technology and Digital strategies, organising in conjunction with business transformation activity.

### **EXPECTED OUTCOMES:**

- Provide frontline services with data led insight to enable them to deliver enhanced customer experience demonstrated by improving customer satisfaction with services provided and reduction in complaints
- Documented data process flows aligned with service reviews enabling immediate identification of impacts of change and predictive analysis of future impacts
- Data collection is a key consideration for strategic decision making at SHG demonstrated by inclusion of data as a focus for all critical projects
- Provide structure and a direction of travel to address the data challenges within SHG – ensuring direct links to Technology and Digital strategies
- Data ownership across the business is clear so responsibilities for accurate collection are understood at every level

### **OBJECTIVE TWO – IMPROVE DATA CULTURE AND LITERACY ACROSS THE BUSINESS**

SHG is currently on a journey in understanding the scale and scope of the impact data can have on improving service delivery, for customers and for its assets. Ensuring SHG has a positive data culture is imperative to realising the vision for data. To be an insight led organisation built on a single version of the truth, each stakeholder needs to view data as a core asset and understand the importance of accurate and reliable data in enabling data informed decision making, in addition to understanding how they contribute at an individual level to the long-term ambitions.

This objective sets out to define steps required to achieve an excellent data culture using data literacy as a mechanism to support this.

### **ACTIONS**

- Action 2.1 Establish a Data Literacy programme aligned to the Data Strategy and transformation agenda with Executive sponsorship



- Action 2.2 Use the data definitions to create a common vocabulary to increase understanding across the business
- Action 2.3 Create baseline of employee skills in relation to data
- Action 2.4 Develop Power BI training programme and identify super users in each team
- Action 2.5 Introduce an insight slot within Wider Leadership Team meetings whereby service leads present their performance
- Action 2.6 Ensure regular messaging via internal communications re: best practice in data management
- Action 2.7 Create a Data Fundamentals course using existing e-learning platforms

### **EXPECTED OUTCOMES:**

- Improved data literacy levels throughout the organisation demonstrated by improved accountability for data quality
- Data ownership at business unit level demonstrated by effective consumption of data through a self-service reporting and insight model
- A shift in data culture focused on the importance of data quality, accountability, and ownership evidenced by improvements in customer satisfaction and reduction in complaints

### **OBJECTIVE THREE: IMPROVE DATA GOVERNANCE**

Data Governance is everything an organisation has to do to ensure data is secure, private, accurate, available, and usable. It includes the actions people must take, the processes that must be followed and the technology required for people to be able to do this effectively.

Strong data governance principles are critical for SHG to ensure processes for managing the availability, usability, integrity and security of data and information are robust. This involves specifying accountability and ownership for data and creating data standards to support data quality, security, privacy, and usage throughout the data life cycle.

This objective sets out to define the steps required to ensure SHG create a framework within which data can be trusted to drive business growth, decision making and support Digital transformation.

### **ACTIONS**

- Action 3.1 Create a Data Governance function at SHG as part of the Information Governance team
- Action 3.2 Identify Data Owners within each business domain<sup>i</sup>

- Action 3.3 Establish a Data Governance Group chaired by an Executive Data Sponsor and include each business domain data owner and the data governance function
- Action 3.4 Develop a business glossary and data definitions for all core datasets including calculations, rationales for exceptions, system location and data owners for each
- Action 3.5 Initiate an SHG Data Quality project and consider the implementation of a Data Quality tool to highlight anomalies
- Action 3.6 Data owners to secure data quality within their team supported by central resources (Data Team) to improve data
- Action 3.7 Develop Data Standards using sector models as reference
- Action 3.8 Apply a structured approach to document management using an Electronic Document Management System solution (EDMS)
- Action 3.9 Ensure common data management principles apply across Data and Digital teams

#### **EXPECTED OUTCOMES:**

- Solid foundation created for effective deployment of reporting technology and infrastructure
- Clear accountability for each data domain assigned and responsibilities for data ownership formalised and documented
- Data owners assigned relevant Key Performance Indicators (KPI's)
- Governance in place to monitor delivery against the Data Strategy and issues identified escalated correctly to minimise organisational risk
- Performance Management Framework in place to reinforce organisational responsibility for business performance and assure of data quality through centralised validation
- Data quality is consistently high employing data quality software where required
- Standardised SHG Key Performance Indicators (KPI's) using sector recognised definitions
- Creation of a managed repository of structured and unstructured files
- Evidence application of good data management principles particularly with reference to General Data Protection Regulation (GDPR)

#### **OBJECTIVE FOUR: DEVELOP AN ANALYTICS OPERATING MODEL**

An Analytics Operating Model defines how the organisation will use data to solve problems, make decisions and improve services. The Analytics Operating Model will define how data and analytics are governed to ensure SHG is maximising insight from data. SHG will operate a hybrid model with a central function providing best practice, standards, and support to the wider business in relation to performance management and business insight.

This objective sets out to define steps required to create and embed this model.

## **ACTIONS**

- Action 4.1 Implement an Analytics Operating Model that includes a centrally managed function overseeing performance management and business insight
- Action 4.2 Consider skills in each department to ensure correct level of knowledge is available to implement the model
- Action 4.3 Map dependencies between Data, Technology, Digital and Information Governance teams and define how the services will interact
- Action 4.4 Promote the Analytics Operating Model

## **EXPECTED OUTCOMES:**

- Definitive descriptions of roles of central function (Data Team / Information Governance Team) and wider business in delivery of performance management and business insight
- Implementation of a self-service reporting model using Power BI<sup>ii</sup> as the primary reporting tool
- Clear roles and responsibilities established across Data, Technology, Digital and Information Governance teams, separating responsibilities for performance, data governance, data quality and data curation<sup>iii</sup>
- Reinforce awareness of responsibilities in relation to data across the business

## **OBJECTIVE FIVE - IMPROVE DATA ARCHITECTURE BY ENABLING DATA INTEGRATION**

To ensure data is structured in a way to make it easily accessible, the Data Platform needs to be defined. A Data Platform is an integrated set of technologies that collectively meets SHG's end to end data needs. The Technology Strategy includes an objective relating to "consolidating the technology estate" and alignment with this will inform data platform decisions. This will also support data security by ensuring a security layer is included for users and applications. In summary, decisions regarding cloud, on premise or hybrid technology infrastructures will need to be made to inform how SHG acquires, stores, prepares, and consumes its data.

This objective sets out steps required to improve data architecture and reduce reporting and insight limitations.

## **ACTIONS**

- Action 5.1 Design and implement a Data Platform that defines the overall approach to the data technology environment ensuring data can be collected, stored, managed, and analysed effectively

- Action 5.2 Investigate the benefits of implementing a Data Warehouse at SHG
- Action 5.3 Introduce a Power BI implementation programme that supports self-service across all business areas
- Action 5.4 Develop data standards on the Power Platform with Digital Teams

#### **EXPECTED OUTCOMES:**

- Improved data quality achieved by alignment with the Technology roadmap in association with Stockport Council (SMBC) aspirations
- Fully integrated core datasets enabling improved access to data from a single repository and location, leading to improved customer experience
- Creation of one version of the truth across core datasets evidenced by improvements in customer experience and satisfaction with SHG services
- Deliver business unit dashboards to inform real-time operational decision making and measurement of value for money efficiencies as a result

## **5 EQUALITY IMPACT ASSESSMENT (EIA)**

- 5.1 An EIA has been completed and four key areas of customer impact highlighted as follows: -

- Improving accessibility of data
- Improving data quality will ensure SHG can tailor services for customers with diverse needs
- Improving cohesion with digital objectives and considering communication preferences
- Using data to drive decision making by ensuring robust information is available to staff when delivering services

The EIA against the Data Strategy does not suggest any direct negative impacts on customers with protected characteristics. It is expected that the strategy will have an overall positive impact by making greater use of data to improve the delivery of services through improved quality, accessibility and control over data. The potential for the strategy to cause a negative impact will be kept under review as the data, digital and technological environment progresses, so that mitigations can be put in place where necessary.

## **6 LINKS TO STRATEGIES**

- 6.1 This Strategy links to several SHG strategies:

- Technology Strategy
- Digital Strategy
- Business Transformation Strategy
- Customer Access Strategy
- SHG Business Plan 2023-26

All SHG strategies will need to consider data as part of their requirements to evidence progress against objectives. This has been highlighted in Objective 1 (Action 1.2)

## **7 ACTION PLAN**

- 7.1 The Data Management Action Plan is attached at Appendix 1. This plan follows recommendations set out by Housemark as a result of their Data Strategy Discovery report.

## **8 OWNERSHIP, MONITORING & REVIEW**

- 8.1 The Head of Data is the owner of this Strategy and responsible for implementation and ongoing monitoring of progress against objectives and outcomes
- 8.2 Multiple forums and frameworks will be utilised to measure the success of this strategy as it progresses:
- Audit and Risk Committee
  - Senior Leadership Team
  - Data Governance Group
  - Digital Transformation Board
- 8.3 The Strategy will be reviewed by August 2026 and there will be an annual review of the Data Management Action Plan.

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<sup>i</sup> A Data Domain is used to identify and group similar types of data and assign accountability

<sup>ii</sup> Power BI is a business intelligence tool used to connect and visualise data through easy-to-use dashboards and interactive reports

<sup>iii</sup> Data Curation is the process of creating, organising, and maintaining datasets so they can be accessed and used for business intelligence purposes