

**CLYDESDALE HOUSING ASSOCIATION LIMITED**

**Policy:** Digital Strategy

**Date:** 28 September 2022

**Lead Officer:** Chief Executive

**Review Date:** September 2023

**Regulatory Standard:** **Standard 3**  
The RSL manages its resources to ensure its financial well-being, while maintaining rents at a level that tenants can afford to pay.

**Regulatory Guidance:** 3.3 The RSL has a robust business planning and control framework and effective systems to monitor and accurately report delivery of its plans. Risks to the delivery of financial plans are identified and managed effectively. The RSL considers sufficiently the financial implications of risks to the delivery of plans.

**Regulatory Standard:** **Standard 4**  
The governing body bases its decisions on good quality information and advice and identifies and mitigates risks to the organisation's purpose.

**Regulatory Guidance:** 4.3 The governing body identifies risks that might prevent it from achieving the RSL's purpose and has effective strategies and systems for risk management and mitigation, internal control and audit.

**Clydesdale Housing Association will provide this policy on request at no cost, in large print, in Braille, in audio or other non-written format, and in a variety of languages.**



## **1. Purpose**

- 1.1 Clydesdale Housing Association's (CHA) Vision and Common Values focus on service delivery and the pursuit of excellence:

Our Vision: Quality homes and excellent services for all – today and in the future

Delivered through these Common Values:

- we listen, learn and work with customers, stakeholders and partners to improve how we work in the pursuit of excellence
  - we encourage leadership and teamwork to identify and share progressive ideas
  - we value our people's commitment and support their enthusiasm in achieving success
  - we invest in the wellbeing of our customers and our people
- 1.2 CHA's use of digital technologies is already crucial to how we operate and this importance will increase as broadband coverage in our area expands and the appetite for digital services by our customers grows.
- 1.3 This Digital Strategy sets out CHA's overall digital priorities for the next 5 years (up to March 2025). These priorities will focus on the following themes:
- Enhancing our customer experience by providing options to engage with us using digital platforms that will be available 24/7.
  - Improving how we work. This will include smarter working that uses digital technology to improve efficiency through automation of current manual processes and remote/mobile working that will increase the time our staff can spend on customers.
  - Improving data management and analysis that will shape our decisions, risk management and future direction.
- 1.4 These themes will be described in some more detail later in the Strategy.

## **2. Strategy Development**

- 2.1 Consistent with CHA's Common Values, the development of this Strategy has been shaped through the involvement of our staff team. Two sessions were led by the CEO over August and September 2022. These sessions provided staff the opportunity to identify:

- Aspects of CHA's current digital arrangements that need to change in order to enhance our customer experience and improve the way we work.
  - Ideas and projects that involve digital technologies that will play a part in achieving our Vision and 2022/25 Business Plan Objectives.
- 2.2 Key elements from these discussions are incorporated into this Strategy.
- 2.3 The CEO and Management Team have also participated in industry scanning in order to identify initiatives that other RSLs have taken on the digital front.
- 2.4 The results of the 2019 Tenant Satisfaction Survey have also been referred to

in developing this Strategy. However, with a new Survey planned for late-2022, the relevance of this now historical data is now in doubt. The 2022 Survey results will be reviewed and analysed to further inform the Strategy in early 2023 – particularly around the customer experience theme.

- 2.5 The Strategy will be the subject of discussion with the Clydesdale Tenants and Residents Group in due course, but this will take place following the analysis of the 2022 Tenant Satisfaction Survey results.
- 2.6 The involvement of other relevant stakeholders will be sought in relation to specific initiatives and projects as the Strategy is implemented.

### **3. Strategy Themes**

#### **3.1 Enhancing the Customer Experience**

- 3.1.1 CHA aims enhance our customer experience by providing options to engage with us using digital platforms that will be available 24/7.
- 3.1.2 CHA has a strong track record of high customer satisfaction in relation to participation and information. This has been built on a customer friendly culture that encourages direct engagement with staff. Developing a digital customer experience will seek to enhance this and offer choice on how customers may wish to engage now and in the future. Digital options will not signify a digital by default approach by CHA.
- 3.1.3 CHA's website already offers the ability for customers to engage with us on a range of service matters through e-forms. The ability to offer protected real-time customer access to personal data such as rent account and reported repairs status/history would enhance service provision, access to information and potentially reduce the number of personal enquires handled by staff.
- 3.1.4 The range of digital customer offerings will be influenced by 2022 Tenant Satisfaction Survey Results and engagement with the Clydesdale Tenants and Residents Group.
- 3.1.5 CHA will examine website-based options and app-based possibilities.
- 3.1.6 The use of customer engagement software has already been introduced by CHA for communicating with customers and seeking feedback on services. We will expand our use of this software to:
- Digital newsletter distribution
  - Other organisational communications
  - Obtain ongoing feedback on service satisfaction
  - Introduce automated transactional surveys (e.g., repairs, new lets, anti-social behavior, improvement works, service complaints)
  - Consult with customers (e.g., rent reviews, major policy reviews, improvement works options)

#### **3.2 Improving How We Work**

- 3.2.1 Smarter working that uses digital technology to improve efficiency through automation of current manual processes and remote/mobile working will open possibilities for increased staff time with customers and a reduction in routine repetitive tasks that can be demotivating.

- 3.2.2 CHA's finance systems are a blend of finance modules on our housing database software and MS Excel workbooks and these require significant manual data entry to maintain and operate. A more comprehensive accounting software system could introduce automation thereby reducing manual input, improve transparency and provide real-time reporting.
  - 3.2.3 Similar to 3.2.2, a shift from manual entry of rent and Housing Benefit payments to automated processes would reduce time spent on these tasks and improve data entry.
  - 3.2.4 Identifying and redesigning labour intensive processes with an emphasis on digital solutions will help to improve service delivery timescales and potentially improve income (e.g., use of mobile technology in repair reporting by staff on site and when inspecting empty houses; also, mobile technology use linked to automated tenant communications for estate management and arrears control).
  - 3.2.5 A shift away from letter writing to e-mailing tenants would improve formal communication timescales and further reduce stationery, printing and postage costs.
  - 3.2.6 Implementing currently unused existing housing software to link with telephone and email systems will reduce tenant contact process times and improve the customer experience.
  - 3.2.7 Office use of dual monitors at each workstation has improved working styles and reduced stationery and printing costs. Investment in similar home set-ups for staff where possible would ensure that home working is as productive as that in the office.
  - 3.2.8 CHA invested heavily in laptops during the Covid-19 pandemic in order to facilitate home working for staff and a shift to video conferencing for the Management Committee. Now that public health restrictions have been removed and physical meetings have returned, more use of laptops could be made by CHA to reduce the production and distribution of hard copy Committee Reports. Management Team members and some Committee Members have already implemented this. Wider adoption by Committee Members would be welcome and be consistent with CHA's Environmental Policy.
  - 3.2.9 An asset management plan for hardware and potential use of cloud-based technologies that will deliver value to CHA will be developed over the period of this Strategy. Cloud-based technologies will enhance CHA's disaster recovery and business continuity arrangements.
- 3.3 Data Management & Analysis
- 3.3.1 Improving how we manage data and analyse it will influence our decisions, improve our risk management and shape CHA's future direction.
  - 3.3.2 Using our dedicated housing systems more and less reliance on spreadsheets will improve data integrity and GDPR compliance.
  - 3.3.3 Developing in-house expertise in SQL report design will utilise more reporting directly from our housing systems which will enhance real-time performance monitoring and business insight.
  - 3.3.4 Business Intelligence and Analytics will further enable analysis through data preparation, data management, and data visualisation. Such insights will inform and influence future business plans and strategies.

#### **4. Implementing the Digital Strategy**

- 4.1 The CEO will take overall responsibility for delivery of the Digital Strategy.
- 4.2 Funding the Strategy will be incorporated into annual budget and long-term cashflows to ensure adequate resourcing. The Management Team will advise the Management Committee on where the Digital Strategy lies in respect of overall organisational priorities going forward.
- 4.3 Investment in Strategy projects will require a value for money justification.
- 4.4 To support this, a Digital Strategy Group has been established to:
  - Develop a detailed action plan for implementing the Strategy
  - Oversee and report on digital projects and initiatives associated with the Strategy
  - Develop relevant digital expertise and source specialist advice when required
  - Champion the adoption of digital solutions within CHA
- 4.5 Draft Action Plan:
  1. Enhancing the Customer Experience
    - Review 2022 Tenant Satisfaction Survey feedback on digital services demand – Yr 1
    - Investigate and develop website and possible App to offer greater customer functionality Yr 2–3
    - Expand use of customer engagement software – Yr 1-2
  2. Improving How We Work
    - Identify and redesign the most labour intensive processes, to incorporate digital automation – Yr 1-3
    - Investigate and procure comprehensive accounting software system – Yr 2-3
    - Digitally link housing software and phone/email systems – Yr 1-2
    - Invest in homeworking hardware to maximise productivity – Yr 2
    - Wider adoption of digital Committee papers – Yr 1
    - Develop an asset management plan for hardware and potential use of cloud-based technologies – Yr 1-3
  3. Data Management & Analysis
    - Develop in-house expertise in SQL – Yr 1-3
    - Utilise more reporting directly from our housing systems – Yr 1-3
    - Investigate and develop Business Intelligence and Analytics solutions for data preparation, data management, and data visualization – Yr 1-3

4.6 Monitoring Strategy Progress and Reporting

4.6.1 The CEO will report to the Management Committee on progress against the Action Plan at 6 monthly intervals.