

Data Strategy

2025-2028



Co-operative and Community
Benefit Society No. 30348R

Regulator of Social Housing
No. L4507

southwayhousing.co.uk

1. Executive Summary

This document outlines a strategic approach to enhance data management, analytics, and overall business insight within the organization. It focuses on creating a secure, integrated, and adaptable data infrastructure while fostering a culture of data-driven decision-making.

Key initiatives include:

- **Establishing a single source of truth** by integrating all data systems for comprehensive analysis and insights.
- **Developing robust policies** for data access, sharing, and lifecycle management to ensure security and compliance.
- **Implementing Data Loss Prevention (DLP) measures** to protect sensitive information and adhere to data protection regulations.
- **Creating an Analytics Operating Model** to embed structured data analysis into business processes, promoting performance management and business insights.
- **Deploying a modern analytics platform**, empowering self-service reporting, and maintaining reporting tools for efficiency and relevance.
- **Enhancing data architecture** to enable seamless integration, improve accessibility, and ensure security through optimized IT infrastructure.

These initiatives collectively aim to transform how the organization utilizes data, ensuring operational excellence, informed decision-making, and a secure, compliant data ecosystem.

2. Introduction

This Data Strategy sets out Southway Housing Trusts approach to obtaining maximum value from one of our most important assets, data. It provides a framework to outline how we will collect, manage, store, analyse and use data to ensure achievement of goals, objectives and ultimately excellent customer service.

Excellent customer experience is driven 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 our customers can influence decision making at every level.

Having the customer voice at the heart of data collection ensures that we support 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 customers using a 'one version of the truth' integrated approach to data management.

The Data Strategy aims to enable data informed decision making across the organisation. By valuing data as a strategic asset Southway 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, ensuring everyone within the business understands their role in the delivery of good data management.

3. Vision

The vision for this Data Strategy is:

“Southway will be a data-driven organisation; capturing, managing and using information about our customers and homes to challenge and improve how we deliver our services. We’ll demonstrate how data insights have led to meaningful changes in how we support our people and places.”

4. Background

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 Southway wanting to formalise a strategy that clearly sets out its approach and aspirations in relation to Data Management.

An internal assessment of our Data maturity highlighted the following current position:

- **Data Culture:** There is a sound understanding of the importance and relevance of good data management at all levels within the organisation. There is however too much reliance on manual input and quality control, where greater levels of automation would increase efficiency and effectiveness and reduce the risk of human error.
- **Data collection, quality and management:** Data collection and quality assurance is, broadly speaking, good. However there remains a challenge

around siloed storage and local management of information. Our Data is a corporate asset and should be treated as such through a more centralised approach, enabling us to have a 360-degree view of our assets and customers.

- **Data infrastructure:** Systems infrastructure is a strength of the organisation, with a decision to utilise and invest in our Housing Management System, Open Housing, proving positive. However, there are a few core systems within our infrastructure that do not integrate and therefore hinder data flow. As we grow and our systems needs become more bespoke and complex, we need to be mindful of integrations, data transfer and auditability of the information we possess.

5. Context

In April 2025, we launched our new Corporate Plan for 2025-2030 which highlighted a series of themes:

- **Customers:** Our customers are at the heart of everything we do. We'll listen and respond positively to our customers, using their feedback to influence and continually improve services.
- **Homes:** We'll provide good-quality, safe and affordable homes that customers are proud to live in.
- **Neighbourhoods & Communities:** We'll provide services that support good health and wellbeing, are home to good-quality and well-maintained green spaces, and promote neighbourliness and community safety.
- **Colleagues:** We'll be an inclusive employer of choice, where colleagues are skilled, engaged and motivated to provide excellent customer services within a culture that celebrates innovation, collaboration, challenge and support.
- **Growth:** Our ambition is to grow responsibly and efficiently. We will build new homes to help solve the housing crisis and acquire properties from other social landlords to increase the number of homes we own.
- **Sustainability:** We'll work with our partners to deliver new technologies and green solutions that will reduce customers' energy bills and our carbon footprint.

To achieve the above, the Plan also identifies key parts of our 'Toolkit'. These are the thematic resources we would need to invest in to be successful over the period of the Plan. This Strategy supports and strengthens the **Systems and Processes**, **Data** and **Digital** themes and will be a key driver in the successful delivery of the Plan going forward.

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 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”, further supporting the need for 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.

6. Strategic Objectives and Actions

This strategy will achieve multiple objectives that are set out below, including high level actions for delivery.

Improve Customer Experience Using Data to Inform Decision Making:

We will use data to understand tenant needs and preferences, enabling us to enhance our services and support. This data-driven approach will help us make informed decisions that improve tenant satisfaction and community wellbeing.

Continually improving customer experience remains a key focus for Southway, achieved by delivering excellent customer service and 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 Regulator, 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 our assets is also critical to ensuring excellent customer experiences. We are 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.

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:

- **Collect and Analyse Tenant Feedback:** Implement regular surveys (TSM/ Transactional surveys...) to gather tenant insights and use this data to inform service improvements
- **Enhance Data Quality and Accessibility:** Ensure data about tenants and assets is accurate, complete, and easily accessible to all relevant staff members to support informed decision-making
- **Integrate Data into Decision-Making Processes:** Embed data analysis into our decision-making processes to ensure that all strategic and operational decisions are guided by reliable data and tenant insights.

Improve Data Culture and Literacy Across the Business:

We will promote a culture where data is valued and utilised by all staff members. Comprehensive training programs will ensure everyone understands how to interpret and use data effectively in their roles.

Southway 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 we have 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:

- **Identify Gaps and Needs in Technical Skills:** Assess the technical skill gaps within the business and develop an appropriate training plan to address them.
- **Regularly Measure Progress and Continuously Review:** Continuously monitor our progress and regularly review our strategies to ensure we are on track.
- **Run Data Clinics and ad hoc data workshops:** Conduct data clinics to support day-to-day performance and enhance data literacy among staff.

Improve Data Governance:

We will establish robust data governance practices to ensure data quality, security, and compliance. Clear policies and regular audits will maintain data integrity and protect tenant information.

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 Southway 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 we create a framework within which data can be trusted to drive business growth, decision making and support Digital transformation.

ACTIONS:

- **Create comprehensive data governance practices,** clear ownership and accountability and processes for regular data quality checks and updates.
- **Ensure a single source of truth** which is validated and secure through integration of all data systems, enabling comprehensive data analysis and insights.
- **Develop comprehensive policies and controls** for data access and sharing to ensure data security and compliance.

- **Develop and implement defined and approved lifecycle management** rules that comply with business and regulatory standards. Roles and responsibility will be defined and communicated to the business; training will be provided.
- **Implement Data Loss Prevention (DLP)** measures to safeguard sensitive information and ensure compliance with data protection regulations.

Develop an Analytics Operating Model:

We will create a structured analytics operating model to integrate data analysis into our business processes. This model will define roles and workflows, ensuring analytics drive positive outcomes for our tenants.

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 we are maximising insight from data. We 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:

- **Implement a Modern and Adaptable Analytics Platform (Power BI):** Deploy a flexible and up-to-date analytics platform to support our data analysis needs.
- **Train the Business and Promote Self-Service Reporting:** Equip our team with the skills to use the analytics platform and encourage self-service reporting to improve efficiency with insights for business decisions.
- **Monitor and Maintain Reporting Tools:** Regularly review the use of the reporting tool to ensure it remains efficient and relevant, and integrate future platform updates as needed

Improve Data Architecture by Enabling Data Integration:

We will enhance our data architecture to facilitate seamless data integration across systems. This will ensure data is accessible and consistent, supporting informed decision-making and operational efficiency.

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 our end-to-end data needs. This objective traverses IT infrastructure actions and will encompass strengthening and consolidating our technology estate. Decisions around infrastructure will be made in conjunction with IT and remain mindful of cyber security considerations.

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 we acquire, store, prepare, and consume its data.

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

ACTIONS:

- **Enhance Data Accessibility:** Ensure that data is easily accessible to all relevant stakeholders, facilitating informed decision-making across the organisation.
- **Implement Robust Security Measures:** Include a security layer for users and applications to protect data integrity and privacy.
- **Optimize IT Infrastructure:** Make informed decisions regarding cloud technology infrastructures to support efficient data acquisition, storage, preparation, and consumption.

7. Security Risks and Mitigation

As Southway transitions toward a data-driven organisation, safeguarding sensitive information becomes paramount. The evolving threat landscape—including phishing, ransomware, insider threats, and misconfigured systems—poses significant risks to data integrity, confidentiality, and availability. To mitigate these risks, Southway will adopt a defence-in-depth approach, layering multiple security controls across the data lifecycle.

A key component of this strategy is **Role-Based Access Control (RBAC)**, ensuring that users only access data necessary for their roles. This principle of least privilege reduces exposure and limits the impact of potential breaches. **Access policies** will

be centrally managed and regularly audited to maintain compliance with regulatory standards such as GDPR and the Social Housing Regulation Bill.

Southway will leverage Microsoft's latest security best practices, including integration with **Microsoft Purview**, a unified data governance solution. Purview enables **automated data classification, sensitivity labelling**, and risk-based access policies across cloud and on-premises environments. It also supports **Data Loss Prevention (DLP)** and insider risk management, helping to detect and prevent unauthorized data sharing.

Additional and current measures include:

- Multi-Factor Authentication (MFA) for all users.
- Conditional Access Policies to restrict access based on device health, location, and user risk.
- Encryption at rest and in transit for all sensitive data.
- Regular penetration testing and vulnerability assessments.

Security will be embedded into the design of Southway's data architecture, ensuring that all systems—from the Housing Management software to analytics platforms—adhere to secure-by-design principles. Staff will receive ongoing training to recognize threats and uphold data protection standards.

By implementing these layered controls and modern governance tools, Southway will build a resilient, secure data ecosystem that protects tenant information and supports regulatory excellence.

8. Conclusion

The actions outlined above form the basis of a detailed action plan by which success of the Strategy will be measured. Progress will be reported to the Executive Team on a regular basis with an annual update provided to Board.