



Digital & IT Strategy

2024 – 2026

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Executive Summary

Overall Aims and Purpose

As a progressive organisation, we know it is important that we continue to improve what we do, become more efficient and deliver an excellent service to our customers. Our WSHA Group Digital & IT strategy is a key tool to enable us to do this. It is also key to us that our systems and data are well governed, secure and operate in line with legislative requirements.

The overall aims of this strategy are:

- To improve delivery of services to our customers
- To improve organisational efficiency to enable us to make the best use of resources and reduce costs
- To continuously review and improve our Digital & IT delivery to support the above aims
- To ensure that our systems are safe, robust and secure

In order to achieve these overall aims, we have identified a number of strategic objectives which will we deliver over the next 2 years.

Strategy Objectives

- **Ensure our current systems are functioning effectively to meet organisational needs**
- **Work with staff teams to encourage a positive culture in respect of Digital & IT**
- **Further develop current systems to improve how we work**
- **Research & explore new technology and new ways of working**
- **Ensure we have effective IT governance infrastructure in place**
- **Improve our business information, data and reporting**

This Strategy is a two-year Strategy and includes an action plan for each year.

1. Introduction & Context

1.1 The principles of our Digital & IT Strategy are fundamental to our organisational vision and strategic aims.

Our Vision:

We go further to provide housing you call home

Our Strategic Aims

The table below outlines our strategic aims and how the Digital & IT Strategy objectives below will aim to support the achievement of our strategic aims:

- **Ensure our current systems are functioning effectively to meet organisational needs**
- **Work with staff teams to encourage a positive culture in respect of Digital & IT**
- **Further develop current systems to improve how we work and become more efficient**
- **Research & explore new technology and new ways of working**
- **Ensure we have effective IT governance infrastructure in place**
- **Improve our business information, data and reporting**

WSHA Group Strategic Aim	Linked Strategy Objectives
Deliver outstanding service to all our customers	<ul style="list-style-type: none"> • Further develop current systems to improve how we work and become more efficient • Research & explore new technology and new ways of working • Improve our business information, data and reporting
Maintain and improve our homes and communities and develop new homes to meet local needs	<ul style="list-style-type: none"> • Research & explore new technology and new ways of working • Improve our business information, data and reporting
Be the best we can be for our customers, staff and volunteers	<ul style="list-style-type: none"> • Ensure our current systems are functioning effectively to meet organisational needs • Work with staff teams to develop a positive culture in respect of Digital & IT • Further develop current systems to improve how we work and become more efficient • Research & explore new technology and new ways of working • Ensure we have effective IT governance infrastructure in place

WSHA Group Strategic Aim	Linked Strategy Objectives
	<ul style="list-style-type: none"> • Improve our business information, data and reporting
<p>Work with others to improve tenant's lives and deliver sustainable communities</p>	<ul style="list-style-type: none"> • Ensure our current systems are functioning effectively to meet organisational needs • Further develop current systems to improve how we work and become more efficient • Research & explore new technology and new ways of working • Improve our business information, data and reporting
<p>Be well managed and financially strong</p>	<ul style="list-style-type: none"> • Work with staff teams to develop a positive culture in respect of Digital & IT • Further develop current systems to improve how we work and become more efficient • Ensure we have effective IT governance infrastructure in place • Improve our business information, data and reporting

This strategy focuses on the way we work and our service delivery. We are also seeing new technology being introduced in respect of maintaining and improving homes particularly in respect of increasing energy efficiency and reducing damp and mould and other significant property issues. It is important that we keep up to date with these developments and continuously review how we could use new technologies in our tenants' homes. This will support us in managing and improving these homes but also impacting positively on our tenants' lifestyles e.g. warmer homes, reduction in energy costs etc. This element of new technology will be taken forward through the delivery of our Asset Management Strategy rather than this Strategy document.

1.2 Context

We introduced our first Digital & IT Strategy in 2020, a further review of the strategy was carried out in 2022 and the strategy was updated to further improve what we do. Over the past 4 years, significant progress has been achieved. Some of these key areas of progress are detailed below:

- Implementation of Tenant Portal and App to enable self-service for our tenants
- Implementation of Office 365
- Roll Out of new hardware programme (Move from Chromebooks to laptops)
- Implementation of new phone system
- Further development of our Housing Management System including upgrade, implementation of feedback module for complaints

- Digitalisation of HR services including new HR system (move from various spreadsheets to one system)
- Implementation of online housing application form
- Implementation of Digital Sign-Up packs
- Use of electronic signing software
- Migration to SharePoint
- Secure, flexible hybrid working facilities
- Improved Disaster Recovery capabilities
- Implementation of Digital Estate Inspection Software

Any actions outstanding from the previous Strategy have been added to this Strategy where they are still relevant.

1.3 Current Status

While we have made progress over the last four years in respect of Digital and IT, we are in a position that we need to improve and develop current systems but also ensure we keep abreast of new developments in respect of technology so we can continue to progress and improve as an organisation. The Corporate Management Team (CMT) carried out a review of Digital and IT in December 2023 with input of the IT Manager, IT Team and wider staff teams. As part of this review, the CMT compiled a SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats) which forms the basis of this strategy. This analysis can be found at Appendix 3.

1.4 Systems

We have a significant number of Digital & IT systems in place and this in itself presents challenges for the organisation in respect of ensuring we have sufficient knowledge of the systems, training staff, maintaining and developing them and it creates a reliance on a number of third party providers. The detail of which systems we have in place and who provides these can be found at Appendix 2 of this Strategy.

We had particular challenges in the past few years in respect of our Civica Systems: CX Housing Management System and Civica Financials. There are various reasons for this but as a result it has had an impact on staff and management confidence in the systems and has caused concern at Board level. Over the past year, we have implemented a project plan to upgrade the CX Housing Management System to resolve issues staff have raised. As part of this project, we also developed in partnership with Civica, a new online application form and process which has significantly improved how we process housing application forms, we have moved from a backlog of applications taking up to 6 months to process, to applications being processed within 24 hours. This project was an extremely successful project and a good partnership approach and it has given us confidence to further develop both CX Housing and Civica Financials using this partnership approach with Civica and also implementing learning from the recent project.

It is acknowledged that there is still work to be done in respect of building up staff confidence in the systems and, similarly, providing our Board with assurance in them. Over the past few years, there has been a lot of focus on our Civica systems as they are key systems to us, however, this has been at the expense of our asset management system, Asset Pro, which requires further development to ensure we

can meet our regulatory and legislative requirements, particularly in respect of net zero and ensuring that our properties are energy efficient. It is our intention that the development of Asset Pro will be one of the key projects in the first year of this strategy.

Over the past few years, there has been a drive to digitalise manual, time-consuming tasks and be more efficient. As a result of this we now have a significant number of systems as detailed in Appendix 4 and as mentioned above this brings a number of challenges, therefore we will also be reviewing our systems this year to see where we can streamline systems.

1.5 Change in Approach

As mentioned above, there has been a drive over the past two years in particular to reduce time-consuming, manual tasks but also to improve our data management and reduce the number of spreadsheets and individual data bases that we have and this has led to increased system implementation and development. At times, this has not been delivered successfully or in the most effective way due to the number of projects that we have been implementing at the same time.

The recent implementation of the CX project plan has demonstrated that many of these projects are time consuming and draw on various resource, they are also subject to delay due to technical issues. In order to mitigate the risk of this, in many cases, we need to carry out user acceptance testing in a test system before going live. We need to involve teams who are already busy in the testing and also ensure training is delivered. This has highlighted that we need to change our approach in respect of Digital & IT Projects. As part of the implementation of this strategy, we will be implementing a more planned approach to ensure that we can deliver on each project effectively. We will develop an Annual Work Plan which will be signed off by CMT and this will be the plan for the year. If other projects become more of a priority, a planned project will need to be pushed back. Again, this will be approved by CMT. In addition to this, we will be establishing a project management approach to all IT Projects – this will include detailed project plan including resource requirements, regular project management, reporting and communication to staff and a risk assessment.

While it may seem on the face of it that this change in approach means we are doing less than previous years, it will ensure that all projects we undertake will be delivered successfully and in a way that will be beneficial to the organisation and its staff. Previously, we have often been so keen to implement systems to improve things that we have taken on too much and not always delivered or delivered in a way that has had buy in and involvement from staff teams. This has resulted in us being in a situation that for some systems and teams, we are having to revisit systems to resolve basic issues and processes that should be in place, or we need to provide further staff training as issues are arising due to lack of knowledge of how the system works. Therefore, while each project may take more time with this approach, it is anticipated that this approach will be beneficial longer term for both the organisation and its staff.

1.6 Staff Profile & Culture

The number of systems and the rate of change both within the organisation and in the Digital landscape results in the WSHA group having a varied profile in our Digital and IT functions and requirements. Some roles require basic essentials such as email and document management, while others require proficiency in systems and/or software, e.g. Civica Systems, Excel, SharePoint.

As it currently stands, the range in staff skills and abilities in Digital & IT is not aligned with our current position as an organisation. Because of this disparity there is a mismatch between the skill set of our staff, our current business needs and this Strategy. We have a number of staff who do not have sufficient knowledge and expertise in respect of the systems that we require them to use and in particular we appear to have a deficiency in respect of knowledge and skills in respect of data analysis and use of spreadsheets. This impacts us as an organisation and has resulted in a small number of staff undertaking more complex excel tasks and data analysis requirements.

There is a risk that as we continue to develop and improve our Digital & IT systems that we increase the number of staff who are not proficient or able to keep up with these developments. This will cause us significant issues in loss of efficiency and staff confidence. Therefore, it is essential that, as we implement this Digital & IT Strategy, we ensure that we develop and improve staff Digital & IT skills and proficiency as we develop and improve our systems.

In addition to the above, we need to encourage a more positive culture about IT which can be negative at times. This negativity is partly due to the above issues and also a result of outstanding issues and ongoing frustrations with some systems and processes and the perceived lack of progress on tackling them.

The change in approach to implementation of IT projects will help to rectify this and all of the above issues.

1.7 Investment

In order to improve as an organisation for our customers and our staff and to become more efficient through the delivery of this strategy, it is essential that we have the right level of investment. Currently our annual spend in respect of maintaining the current infrastructure is approx. £500,000. We would look to review our systems and infrastructure this year to see where efficiencies can be made in respect of this spend.

In addition to the above, we also have a projected budget of £180,000 for the development of our systems and infrastructure for the financial year 2024/25.

It is important that we invest wisely in terms of IT, that we obtain value for money and also have assurance that any IT investment is going to achieve efficiencies and improve what we do. In short, we must make sure that our Digital and IT investment delivers value for money. In order to do that, we will update and review our current business case model and this will be completed and signed off by the IT Project Board as part of our project management approach. The business case process will

also ensure that the project is aligned to the objectives of this strategy. We will also complete a value for money impact assessment where relevant.

1.8 Changing Landscape

In the big picture, there is a changing landscape in relation to Digital & IT and the future of workplaces and how tasks are undertaken. An important new and rapidly developing element of this is the increased use of Artificial Intelligence (AI). AI is the simulation of human intelligence processes by machines, especially computer systems. Specific applications of AI include expert systems, natural language processing, speech recognition and machine vision.

Use of AI has the potential to significantly change how we work, improve our customer service, service delivery and result in efficiencies. We have some limited experience of using AI so far in respect of automating our housing options process and some other operational processes. This has led to more efficient ways of working, reduction of staff time spent on manual time-consuming tasks and a better service provided to our customers e.g. previously this task required at least 3 days per week of a staff members time, now there is no staff input required. This experience has led us to consider how else we can use AI in respect of how we work while also being aware of the risks and ensuring we remain accessible and “still human” to both our customers and our staff. Exploring how we can further use AI will form part of our approach in respect of implementing this strategy.

In addition, there has been a movement over the past few years away from on premise, server-based systems to cloud-based ones. While many of our current systems are cloud based, some of our key systems, e.g., housing management system, finance system, are of the traditional model. One of the things we would want to explore as part of this strategy is more cloud-based systems and the benefits of these, as this would be a good way of making further efficiencies and improving our infrastructure. Similarly, it can improve IT provision and reliability, as well as increasing our business continuity plans and Disaster Recovery provision.

Overall, we recognise the benefits of new technology and advancement and as part of this strategy it is important that we remain forward thinking and are aware of new technology and advancement and keep up with the changing landscape in a way that is supportive of our customers and staff.

2.Strategic Objectives and Outcomes

2.1 To deliver this strategy, there are six strategic objectives. It is important to us that we identify what outcomes that we are looking to deliver in respect of these objectives so that we can monitor and measure the success of the strategy and the impact it has in respect of the organisation, its customers and our staff.

Strategic Objective	Outcomes to be Achieved	How we will measure
Ensure our current systems are functioning effectively to meet organisational needs	<ul style="list-style-type: none"> • Increase in staff satisfaction • Reduction in staff stress levels • Reduction of IT Helpdesk calls/queries • Increase in customer satisfaction 	<ul style="list-style-type: none"> • Staff IT Survey (baseline then follow up) • Annual Appraisals • Stress Survey (before and 1 year in) • IT Helpdesk reporting • Customer Satisfaction Surveys
Work with staff teams to encourage a positive culture in respect of Digital & IT	<ul style="list-style-type: none"> • Increase in staff satisfaction • Increase in staff engagement • Increase in staff IT skills and knowledge of systems • Reduction of IT Helpdesk calls/queries 	<ul style="list-style-type: none"> • Staff IT Survey (baseline then follow up) • Staff Engagement Survey • Appraisal Process • Staff Engagement Survey • Helpdesk of IT Helpdesk
Further develop current systems to improve how we work and become more efficient	<ul style="list-style-type: none"> • Increase in customer satisfaction • Performance Improvement (KPIs) • Achieve efficiencies (resource and financial) 	<ul style="list-style-type: none"> • Customer Satisfaction Surveys • Quarterly Performance Results • VFM Impact Assessments • Budget Reviews
Research & explore new technology and new ways of working	<ul style="list-style-type: none"> • Achieve efficiencies (resource and financial) • Performance Improvement (KPIs) • Increase in customer satisfaction 	<ul style="list-style-type: none"> • VFM Impact Assessments • Quarterly Performance Results • Customer Satisfaction Surveys
Ensure we have effective IT governance and infrastructure in place	<ul style="list-style-type: none"> • Compliance with legislation • Reduce risk of cyber attacks • Improved third party supplier performance 	<ul style="list-style-type: none"> • Internal Audit 2024 • Cyber Essentials Plus Accreditation • Audit Committee/IT Project Board Reporting on IT Projects

Strategic Objective	Outcomes to be Achieved	How we will measure
	<ul style="list-style-type: none"> • Delivery of successful IT Projects • Effective and efficient IT infrastructure 	
Improve our business information, data and reporting	<ul style="list-style-type: none"> • Compliance with legislation (GDPR and FOI) • Reduction in manual reporting and spreadsheets • Improved data and reporting – better decision making • Improved Asset Management • Reduction in expenditure • Increase in customer satisfaction • Performance Improvement (KPIs) 	<ul style="list-style-type: none"> • Internal Audit • Customer Satisfaction Surveys • VFM Impact Assessment (Power BI) • Quarterly Performance Reporting • NPV calculations • Budget Reviews

The section below details the actions, we will undertake to achieve each of the strategic objectives.

2.2 Strategic Objective 1 - Ensure our current systems are functioning effectively to meet organisational needs

As detailed above, we have some outstanding issues with our current systems to ensure that they are fit for purpose and functioning in a way that meets business needs. It is important for the organisation and for staff that we resolve these issues and ensure our systems are functioning to meet our needs. To implement this objective we will do the following:

- Resolve issues raised through Team Meeting feedback
- Civica Financials – Implement the Budget Module
- Civica Financials – Implement the Purchase to Pay Module
- Review of Telecommunications (Mobile Phones and Phone System)
- Review hardware in place against team requirements and ensure all required hardware is in place and operating effectively

2.3 Strategic Objective 2 - Work with staff teams to encourage a positive culture in respect of Digital & IT

We currently have quite a negative culture in respect of IT and our systems. There are historical reasons for this. It is anticipated that by implementing our change in approach and communicating and engaging with staff in respect of IT projects, we

can create a more positive culture. In addition to this, we will take a more customer service approach to our IT service and support the IT Team to manage their workload and staff expectations through the changes in approach and processes that we will implement:

- Implement planning and project management approach to assist delivery of successful IT projects and to manage workloads
- Carry out an initial baseline Staff IT Survey
- Communicate regular (at least monthly) IT Update Hub Posts to ensure staff are kept up to date on progress on IT projects/developments
- Involvement of staff in IT projects and working groups (IT Champions are currently in place for each team)
- IT Projects to become standard agenda item at Staff Consultation Group
- IT Update to be included in every All Staff Briefing including celebrating success
- Development of communication protocols as part of customer service standards and SLA
- Assess current gaps in skills and knowledge and identify a range of learning methods
- Development of IT Workforce Development Plan including outcomes and how these will be measured
- Quarterly IT Surgery Topics (based on staff feedback and IT Helpdesk issues) facilitated by IT Team
- Review and monitor IT skills and abilities to ensure that they are developing in line with introduction of new IT developments through one to ones and appraisals
- Review of current In House IT helpdesk Service Level Agreement
- Development of Customer Service Standards for delivery of IT support
- Monitoring and reporting on performance against customer service standards including staff satisfaction levels
- Develop team knowledge, ownership and accountability of team specific systems across the organisation
- Assess the knowledge and skills gaps in respect of the IT Team and our systems and develop a Team Development Plan
- Development of IT Change Management Process

2.4 Strategic Objective 3 - Further develop current systems to improve how we work and become more efficient

There is scope to develop our current key systems and packages to improve how we work, these improvements have the capacity to reduce workload, improve how we deliver services or improve the accuracy of our data which will better inform our decision making. The table below outlines how we plan to develop each of our current systems:

System	Development
Asset Pro	<ul style="list-style-type: none"> • Implementation of new modules , Asbestos, Task Management and Options Appraisal • Integration with CX

System	Development
CX Housing Management	<ul style="list-style-type: none"> • Implementation of Anti Social Behaviour Module • Further development of CRM • Implementation of CX Mobile • Full utilisation of the Contractor Portal
Civica Financials	<ul style="list-style-type: none"> • Identify how system can be further developed • Creation of development plan for Civica Financials based on organisational requirements
Xelion (Phone System)	<ul style="list-style-type: none"> • Install Computer Telephony Integration (CTI) • Identify functions of the system we are not fully utilising and put in place implementation plan
Microsoft Office 365	<ul style="list-style-type: none"> • Consider how we can optimise current package – project plan to be developed to roll out all modules • Assess what other packages are available and consider options for improvement of processes
Rent Sense	<ul style="list-style-type: none"> • Review and consider alternative system
CPL (Factoring System)	<ul style="list-style-type: none"> • Implementation of factoring app
Customer App	<ul style="list-style-type: none"> • Review of current usage and feedback • Increase sign ups and usage (link with Communications Strategy) • Implementation of Phase 2 of Customer App

2.5 Strategic Objective 4 - Research & explore new technology and new ways of working

As detailed above, it is a changing landscape in respect of Digital and IT both worldwide and specifically in respect of our sector and our homes. It is important that we do not lose sight of this and continue to develop and progress to maximise opportunities in respect of new technology. To achieve this objective, we will do the following:

- Support our new AI Working Group of staff to explore how we can utilise AI
- Carry out research into core cloud-based systems and develop a longer term strategy for our systems
- Become involved in sector development and learn from others through the SFHA IT Working Group
- Ensure we have an awareness and keep up to date in respect of new technology and feed this into IT Project Board
- Explore options in relation to new tools and equipment to achieve efficiencies

2.6 Strategic Objective 5 - Ensure we have effective IT governance and infrastructure in place

It is essential that the basis of our IT Infrastructure is strong and effective and therefore we need to ensure that we have effective IT governance and infrastructure in place to reduce our risks in relation to IT. To achieve this, we will do the following:

- Upgrade our servers Operating system to a fully supported version by Microsoft

- Review current server hardware to ensure hardware support and growth capabilities
- Review of ICT Policies
- Work with TSG to review our cyber controls and risks and put an action plan in place
- Carry out Cyber Essentials Self Assessment
- Development of process and procedure notes
- CX Housing Management Upgrade
- Development of Upgrade Plan for all core systems
- Implementation of Project Management approach
- Development and implementation of reporting schedule
- Contract management of key external providers
- Development of IT Annual Plan
- Internal Audit of IT controls – 24/25 Plan
- Review and streamline current systems where possible
- Review of IT Support Package
- Compile age profile in respect of our systems and software and develop longer term strategy to reduce “on prem” to cloud/web based

2.7 Strategic Objective 6 - Improve our business information, data and reporting

In order to operate in the most effective and efficient way, it is essential that our data is accurate, accessible as required and that we can use our data and reporting to make better decisions as a organisation and improve our performance. This is an area that we need to improve on significantly in terms of our improving our data and being able to analyse and report on it. Therefore, it is important that there is a focus on this in respect of this strategy. To achieve this objective, we will do the following:

- Recruitment of Graduate Data Analyst Trainee to support implementation of this objective
- Carry out a core data gap analysis and develop action plan
- Development of a Data Governance Framework
- Review data and cleanse as required
- Development of project plan to implement Microsoft Power BI
- Implement Power BI as an organisational wide reporting tool
- Review our data and records and develop and implement a Records Management Plan
- BDO Audit – Data and Records Retention
- Implement the migration of Documotive to Sharepoint to align our records management
- Integration of Sharepoint and CX
- Improve processes and data in respect of service charges

3.Action Plan

3.1 The actions detailed above for each objective have been developed into an Action Plan which is attached at Appendix 3. The actions have been split over the two-year period of the Strategy. We will review the Strategy Action Plan after Year 1 and carry out a 2nd Staff survey. This review and survey feedback will be used to populate Year 2 Action Plan.

4.Risk Management

4.1 A key element of delivering any strategy successfully and also project management is risk management. In terms of the overall strategy, a risk assessment has been carried out in respect of Digital & IT Strategy and further actions required in respect of mitigation of the risks have been incorporated into the strategy and included in the action plan. The risk assessment can be found at Appendix 4.

Our project management approach to delivery of key IT projects will also include a risk assessment process to ensure that we are identifying key risks to the project in the project planning stage and will include any actions required to mitigate risk in the project plan.

5.Monitoring, Reporting & Review

5.1 The IT Project Board will monitor progress in respect of the Strategy in line with the action plan. We will also provide 6 monthly updates to the Audit Sub Committee. The WSHA Board will receive an annual update.

Appendix 1 SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Key Infrastructure in place (core functions in one system) • Knowledgeable, resilient & committed IT Manager • Director of Corporate Services' Project Management skills • Cx has been demonstrated to work well at other RSLs (good platform for going forward). • Recent positive experience of working with Civica to update and improve system • IT security systems fully tested • Good external IT support • Knowledgeable IT Team • Designated IT Team of 3 staff • Our Digital & Strategy helping to deliver our key aims • WSHA culture of improvement (not standing still) • Flexibility and adaptability to respond quickly to opportunities 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Some staff are resistant to introduction of new software • Communication on IT has room for improvement • Need for a review of IT resources • Do we make optimal use of existing resources • Civica Support could be better • Some staff lacking basic IT skills • Too many separate IT systems for IT Team to support? • IT Team knowledge of Civica? • Reporting systems and data analytics • Robustness of Xelion systems • Robustness of mobiles • MRI/Asset Pro – Limited knowledge across the Asset Team • Too reactive need to be priority led • Interface with Financials • Lack of staff confidence in Civica • CRM & Workflow • Staff resistance to new software • No CTi
<p>Opportunities</p> <ul style="list-style-type: none"> • RSL acquisition – Ensure core systems are robust (when do we know this?) • AI – 2stages – 1 learn about it, 2-use it • Develop staff expertise on AI • Development of Office 365 • Development of Cx • Development of customer App • Development of MRI (to improve Asset Performance) • Cost & Time efficiencies • Move in future to cloud based system rather than Civica – Plan B • Automated Tasks • Wider Digital technology beyond office systems (IoT) • New Tools such as 360 camera etc. • Better at promoting our successes (staff briefings) • Greater use of TSG • Power BI to improve data analytics 	<p>Threats</p> <ul style="list-style-type: none"> • Staff – Key person dependency • Future Civica Upgrades - can lead to further issues but we are required to do them to keep the system up to date • AI – understanding of risks before use • Future increases of Microsoft License Costs • Losing sight of key aims, values and priorities • Lack of long-term vision • Cyber security / ransom attack • How do we keep up with developments in IT? • Are IT team getting the opportunity to horizon scan?

Appendix 2

Current System and Software

System	Description of System	Used By	Third Party Provider
CX Housing	Housing Management System and Repairs	CST, Housing Services & Repairs	Civica
Civica Financials	Finance System	Currently Finance but aim to roll out to all staff for POP	Civica
CPL	Factoring System	Factoring Team	CPL
Breathe HR	HR System	HR Team (admin) All Staff & Managers Self Service	Breathe
SAGE	Payroll	Finance	Sage
Xelion	Phone System	All Staff	Focus
Insight	Policy, Risk Management and Organisational Actions	All Staff for 4Policy	RSM
Asset Pro	Asset Management System	Asset Management Team	MRI
Audit Pro	Development Audit System	Development Team	
Advice Pro	Welfare Rights System	Welfare Rights Team	
Rent Sense	Rent System	Income Max Team	Mobysoft
Documotive	EDRM System	All Housing Staff	MRI
Streetwise	ASB records	All Housing Staff	Gentoo
Sage Accounts	Accounts for WestScot Living	Finance Team	Sage
DocuSign	Secure signature	All Staff	DocuSign
Brixx	Financial forecasting	Director of Finance/Finance Manager	MRI

Appendix 3 – Action Plans

Year 1

Strategic Objective	Actions	Person Responsible	Timescales
Strategic Objective 1 - Ensure our current systems are functioning effectively to meet organisational needs	Resolve issues raised through Team Meeting feedback - complete actions detailed on Team Issues Log	Senior IT Officer	June 2024
	Civica Financials – Implement the Budget Module	Andy McVey	April 2024
	Civica Financials – Implement the Purchase to Pay Module	Andy McVey	October 2024
	Review hardware in place against team requirements and ensure all required hardware is in place and operating effectively – carry out needs analysis with each manager and report to CMT on outcomes	Senior IT Officer	August 2024
Strategic Objective 2 - Work with staff teams to encourage a positive culture in respect of Digital & IT	Implement planning and project management approach to assist delivery of successful IT projects and to manage workloads	Jennifer Cairns	May 2024
	Carry out an initial baseline Staff IT Survey	Jennifer Cairns	April 2024
	Communicate regular (at least monthly) IT Update Hub Posts to ensure staff are kept up to date on progress on IT projects/developments	Jennifer Cairns	Currently in place and diarized
	IT Projects to become standard agenda item at Staff Consultation Group	Jennifer Cairns	From April meeting
	IT Update to be included in every All Staff Briefing including celebrating success	Jennifer Cairns	Currently in place
	Development of communication protocols as part of customer service standards and SLA	Jennifer Cairns	May 2024
	Assess current gaps in staff skills and knowledge and identify a range of learning methods	Jennifer Cairns/Leadership Team	Training needs analysis to be issued to staff in April 2024 and gap analysis carried out in May 2024

Strategic Objective	Actions	Person Responsible	Timescales
	Development of IT Workforce Development Plan including outcomes and how these will be measured	Jennifer Cairns/Andy McVey	June Leadership Meeting
	Quarterly IT Surgery Topics (based on staff feedback and IT Helpdesk issues) facilitated by IT Team	Senior IT Officer	To commence following Workforce Development Plan
	Review and monitor IT skills and abilities to ensure that they are developing in line with introduction of new IT developments through one to ones and appraisals – outcomes to be measured and reported in the Annual Learning & Development report	Jennifer Cairns	Update one to one and appraisal documents – June 2024 Inclusion in June L&D Report – measured in June 2025 L&D Report
	Review of current IT Service Level Agreement	Jennifer Cairns/Andy McVey	April 2024
	Development of Customer Service Standards for delivery of IT support	Jennifer Cairns/IT Team	Following IT Survey – May 2024
	Assess the knowledge and skills gaps in respect of the IT Team and our systems and develop a Team Development Plan	Andy McVey	September 2024
	Development of IT Change Management Process	Jennifer Cairns	October 2024
Strategic Objective 3 - Further develop current systems to improve how we work and become more efficient	Asset Pro – implementation of 3 new modules	Andy McVey/ Scott Cunningham	As per IT Annual Project Plan
	Integration of Asset Pro with CX	Andy McVey/ Scott Cunningham	As per IT Annual Project Plan
	CX – Full utilisation of contractor portal	Senior IT Officer	As per IT Annual Project Plan
	CPL – implement customer app for factored owners	Senior IT Officer	As per IT Annual Project Plan
	Customer App – Review current usage and feedback	Alistair Reid	October 2024
	Customer App - Increase sign ups by 20% and usage	Alistair Reid	March 2025

Strategic Objective	Actions	Person Responsible	Timescales
	Review Rent Sense and consider alternative systems	Robert Campbell	September 2024
Strategic Objective 4 - Research & explore new technology and new ways of working	Report to Audit Committee on use of AI and proposed future plans	Brian Gannon	Nov 24
	New Technology to become standing item at IT Project Board	Andy McVey	From April IT Project Board
	Explore options in relation to new tools and equipment to achieve efficiencies – Report to come to IT Project Board to outline potential options	Andy McVey	March 2025
Strategic Objective 5 - Ensure we have effective IT governance and infrastructure in place	Upgrade our servers operating system to at least Windows Server 2019	Andy McVey	October 2024
	Review of ICT Policies	Jennifer Cairns /Andy McVey	November 2024
	Work with TSG to review our cyber controls and risks and put an action plan in place	Andy McVey	October 2024
	Carry out Cyber Essentials Self Assessment	Andy McVey	February 2025
	Carry out a gap analysis of process and procedure notes in relation to core systems Development of process and procedure notes	Senior IT Officer	August 2024
	Development of plan to develop process and procedure notes as required	Senior IT Officer	September 2024
	CX Housing Management Upgrade	Senior IT Officer	January 2025
	Development of Upgrade Plan for all core systems	Andy McVey	December 2024
	Implementation of Project Management approach	Jennifer Cairns	May 2024
	Development and implementation of reporting schedule	Jennifer Cairns	April 2024
	Develop schedule of Contract management meetings with key external providers	Andy McVey/Senior IT Officer	May 2024
	Development of IT Annual Plan	Jennifer Cairns/Andy McVey	April 2024
	Internal Audit of IT controls – 24/25 Plan	BDO	Q3

Strategic Objective	Actions	Person Responsible	Timescales
	Review and streamline current systems where possible – report to IT Project Board in relation to outcome of the review	Andy McVey/Jennifer Cairns	January 2025
	Compile age profile in respect of our systems and software and develop longer term strategy to reduce on prem to cloud/web based	Andy McVey/Jennifer Cairns	February 2025
Strategic Objective 6 - Improve our business information, data and reporting	Carry out a core data gap analysis and develop action plan	Andy McVey	August 2024
	Recruitment of Graduate Trainee to support implementation of this objective	Jennifer Cairns	Potential funding from Glasgow University – applied for.
	Review data and cleanse as required	Data Management Student	
	Development of a Data Governance Framework	Jennifer Cairns	June 2024
	Development of project plan to implement Power BI	Andy McVey/Jennifer Cairns	May 2024
	Implement Power BI as an organisational reporting tool	Andy McVey/Jennifer Cairns	As per Project Plan
	Review our data and records and develop and implement a Records Management Plan	Jennifer Cairns	Data Review – July 2024 RMP – August 2024 Implementation as per RMP
	Improve processes and data in respect of service charges	Robert Campbell	December 2024

Year 2

Strategic Objective	Actions	Person Responsible	Timescales
Strategic Objective 1 - Ensure our current systems are functioning effectively to meet organisational needs	Review of Telecommunications (Mobile Phones and Phone System)		
Strategic Objective 2 - Work with staff teams to encourage positive culture in respect of Digital & IT	Carry out Annual Staff IT Survey		
	Monitoring and reporting on performance against IT Team customer service standards including staff satisfaction levels		
	Develop team knowledge, ownership and accountability of team specific systems across the organisation		
Strategic Objective 3 - Further develop current systems to improve how we work and become more efficient	CX – Implementation of Anti Social Behaviour Module		
	CX – Further development of CRM		
	CX – Implementation of CX Module		
	Xelion – install CTI		
	Civica Financials – identify how system can be further developed		
	Civica Financials – create development plan based on organisational requirements		
	Microsoft Office 365 – Consider how we can optimise current package – project plan to be developed		
	Microsoft Office 365 – assess what other packages within Microsoft 365 are available and consider options for improvement of processes		

Strategic Objective	Actions	Person Responsible	Timescales
Strategic Objective 4 - Research & explore new technology and new ways of working	Carry out research into core cloud based systems and develop a longer term strategy for our systems		
	Explore options in relation to new tools and equipment to achieve efficiencies		
Strategic Objective 5 - Ensure we have effective IT governance and infrastructure in place	Development of process and procedure notes		
	Contract management of key external providers		
	Review and streamline current systems where possible		
	Review of IT Support Package		
Strategic Objective 6 - Improve our business information, data and reporting	Implement the migration of Documotive to Sharepoint to align our records management		
	Integration of Sharepoint and CX		

Appendix 4 – Digital & IT Strategy Risk Assessment

Current Issues	Strategic Risk	Current Score	Further Actions Required	Target Score
Core systems are currently not functioning effectively and we are not fully utilizing them	Inability to design and implement efficient infrastructure	18	<ul style="list-style-type: none"> • Implementation of Civica Financials modules • Implementation of Asset Pro Modules • Interface between CX Repairs and Civica Financials • Resolve issues from Team Meeting Feedback 	13
Range of Staff Abilities and Knowledge	Fail to embed organisational culture, vision and values	13	<ul style="list-style-type: none"> • Assess current gaps in skills and knowledge and identify a range of learning methods • Development of IT Workforce Development Plan including outcomes and how these will be measured • Quarterly IT Surgery Topics (based on staff feedback and IT Helpdesk issues) facilitated by IT Team • Review and monitor IT skills and abilities to ensure that they are developing in line with introduction of new IT developments through one to ones and appraisals • Utilisation of IT champions and involve staff in IT Projects 	9
	Inability to design and implement efficient infrastructure	18		13
Negative culture in respect of IT – including resistance to change at times	Fail to embed organisational culture, vision and values	13	<ul style="list-style-type: none"> • Implement planning and project management approach to assist delivery of successful IT projects and to manage workloads • Carry out an initial baseline Staff IT Survey • Communicate regular (at least monthly) IT Update Hub Posts to ensure staff are kept up 	9

Current Issues	Strategic Risk	Current Score	Further Actions Required	Target Score
			<p>to date on progress on IT projects/developments</p> <ul style="list-style-type: none"> • Involvement of staff in IT projects and working groups (IT Champions are currently in place for each team) • IT Projects to become standard agenda item at Staff Consultation Group • IT Update to be included in every All Staff Briefing including celebrating success • Development of communication protocols as part of customer service standards and SLA 	
Lack of ability to report effectively and analyse data to inform decision making	Unable to manage our financial position	14	<ul style="list-style-type: none"> • Implement Power BI as an organisational reporting tool • Review our data and records and develop and implement a Records Management Plan 	9
	Inability to design and implement efficient infrastructure	18		13
	Fail to maintain and build on the trust, satisfaction of our customers	18		13
IT Resources – are they sufficient to deliver what we need	Inability to design and implement efficient infrastructure	18	<ul style="list-style-type: none"> • Carry out IT Resource Review • Recruitment of Graduate Training • Development of Annual IT Plan to manage workload • Develop IT team skills and knowledge • Develop knowledge and ownership within teams of systems • Development of staff IT skills and abilities (reduce IT helpdesk support required) 	13
Reliance on third party support in	Inability to design and implement efficient infrastructure	18	<ul style="list-style-type: none"> • Regular Contract management meetings with key providers 	13

Current Issues	Strategic Risk	Current Score	Further Actions Required	Target Score
respect of core systems – can at times be poor			<ul style="list-style-type: none"> • Implementation of project management approach • Implementation of partnership working approach 	
Risk of cyber attack (increase in cyber attacks world wide)	Inability to design and implement efficient infrastructure	18	<ul style="list-style-type: none"> • Work with TSG to review controls and develop action plan • Cyber Essentials Self Assessment • Internal Audit 24/25 	13
Lack of knowledge and ownership within teams of relevant systems	Failure to embed organisational culture, vision and values	13	<ul style="list-style-type: none"> • Utilisation of IT Champions • Implementation of IT Workforce Development Plan (development of knowledge within teams) • Development of process notes 	9
	Inability to design and implement efficient infrastructure	18		
Lack of long-term vision and keeping up to date with developments	Inability to design and implement efficient infrastructure	18	<ul style="list-style-type: none"> • Involvement in SFHA Working Group • Continuous Development of IT Team • Subscribe to relevant IT Updates • Agenda Item at TSG contract management meetings 	13

