

Digital Strategy

2024 – 2026



Date of Review: 15.10.2024

Date of Approval : 15.10.2024

Date of Next Review : October 2026

Dalmuir Park Housing Association can provide this document on request, in different languages and formats, including Braille and audio formats.

Contents

1. Executive Summary.....	2
2. Purpose of the Strategy	3
3. Customers	4
Customer Communication and Portal	4
Digital Inclusion.....	5
4. Suppliers and Contractors.....	6
5. Staff and Board.....	7
Culture.....	7
Further development of HomeMaster	8
Emerging Technology	9
6. Accessibility and Security.....	10
7. Delivering the Strategy.....	11
8. Review	12
9. Action Plan	12
10. Data Protection	13
11. Equalities & Human Rights.....	13
12. Complaints	103

1. Executive Summary

The objective of the strategy is to deliver and modernise the Association's digital services so that they are designed from the customer perspective and are simple, secure, and convenient to use.

Digital tools and solutions will be provided to allow people with the motivation, access, skills and confidence to fully engage with an increasingly digital world, based on their needs.

The immediate focus of the strategy is to make an initial move away from legacy solutions that restrict access and usability by only being available internally or via a single connection to the office based environment (for example; connection to office based server via VPN) to a cloud based hosted system. This means a move to hosted solutions that are accessible from anywhere that has an internet connection.

This includes giving customers the ability to connect to relevant systems (i.e. customer portal) to enable delivery of services digitally, where possible and giving staff the ability to connect to systems to enable management of services. This has already begun with the move to Microsoft 365 and Teams and the implementation of a new housing and finance system that is fully Cloud based and moving towards making the Sheltered Housing Alarm system fully digital.

However, providing such accessibility is not the complete solution. To truly deliver services digitally, processes and ways of working need to change.

The strategy is not about forcing customers to use digital channels - it is about providing the **choice** (and encouragement) for those that want to engage digitally. There is also a focus on continuous improvement to further improve processes that sit behind service delivery.

DPHA's **digital mission** is therefore:

To provide seamless and intuitive technological solutions for customers, staff, stakeholders and technology partners, so that:

- Processes, communication, and services are as efficient and effective as possible
- Data is used to provide information, knowledge, and insights
- Technology is a driver to continually improve the business and its ability to meet its corporate goals

2. Purpose of the Strategy

The strategy aims to deliver and modernise the Association's digital services to allow for digital to aid the delivery of continuous improvements and provide the foundation for future development of IT services.

This strategy is not just about technology - it considers the service from a customer's viewpoint, a supplier viewpoint, and it defines the mindset changes required for staff and customers. It also considers the future and the support required in delivering continuous improvement from the Association's advisors and system and support providers.

Although this initial strategy is for the period 2024-2026, it is not fixed, and it is an agile strategy. It is a fundamental principle that changes can and should be made as the business evolves, and as a minimum this document will be reviewed during the annual budget and business planning cycle.

Existing suppliers will be encouraged through regular account meetings to input to suggested improvements to service delivery, processes and enhancements of hardware and software that would meet the requirements of this strategy.

3. Customers

Customer Communication and Portal

DPHA implemented the first phase of its new housing management system, HomeMaster, in 2023, which has the ability to send communication from the system via digital means such as SMS and email rather than the traditional hard copy letter method.

The Association will also make better use of website for information posting (newsletters, etc) as well as using online survey's (i.e. survey monkey), rather than the traditional hard copy posting method.

Where possible, this facility will be used for outgoing communications with customers in relation to their rent/factoring account and application record. Some communications will need to continue to be issued as a hard copy and this condition will be built into the system.

Staff will look to collect email addresses from customers where this information is not currently available when they are liaising by other methods to enable a move towards the majority of outgoing communications being made by email.

SMS texting will be used for communications that are suitable e.g. gentle reminder if regular payments have been missed or to send message to customers in a close if there is a specific issue relating to the close.

In all cases customers will be asked for their preferred method of communication and this information will be recorded within the system so that where a customer has a preference for hard copy letters this will continue to be provided. Additionally, customers will continue to have the opportunity to talk directly to the Association via telephone calls and face to face meetings.

The HomeMaster system includes a customer portal which allows customers to self serve in some key areas such as viewing account information and reporting repairs and other issues. However, HomeMaster is being significantly enhanced over during mid to late 2024 which will include a rewrite of the customer portal as well as Designer Software updating the system to the new Blazor platform. Therefore, DPHA will wait until this new version is available before making the portal available to customers.

DPHA will review the functionality available to customers in the portal to assess what functionality will be of benefit, but this is likely to include:

- Ability to view balances and transactions
- Ability to view and print statements and other documents
- Ability to view account information
- Ability to report issues
- Ability to message DPHA from within the portal
- Ability to request a repair
- Ability to monitor progress of a reported repair

Before the portal is put live to tenants it will go through a period of testing to ensure functionality and security are suitable.

Once testing has been signed off, the portal will be available via a soft launch to a selection of customers (including tenants, shared owners and factoring customers) to gain feedback on the usability and to effectively deliver a second level of testing.

Following this all customers will be invited to register to use the portal.

The Association currently provides a sheltered housing alarm system for customers within its Sheltered Housing complexes. The system was fully reviewed during 2021 and during 2024, the system will become fully digital with the enhancement of digital telephone lines.

Customers can also access the Association via traditional methods, including telephones. The Association currently has a cloud based telephone system, ensuring that staff are contactable at any time during office hours

Digital Inclusion

This strategy's purpose is to provide the tools to encourage greater digital uptake – initially through traditional channels such as email and texting, but also through self serve via the portal.

The intention is not to force customers to use digital methods of communication only but rather to provide a choice in a modern digital world. To ensure inclusion throughout the DPHA customer base, focus will be on ensuring that the solutions are easy to use with digital inclusion strategies being delivered by DPHA.

Uptake of the services will be encouraged by working with the rest of the business on promotion and demonstrating the solutions to existing customers via a series of workshops and training sessions.

As new customers (rent, factored and DOSCG) are taken on board, communication options will be explained, including the customer portal. Assistance in setting up access to the customer portal will also be offered.

4. Suppliers and Contractors

HomeMaster also has the ability to communicate with suppliers via email and the repairs module includes a contractor portal.

Repairs works orders issued from the system are already being sent via email where a valid email address exists for the contractor. Additionally, non repair purchase orders raised via the purchasing module can be issued via email and again where a supplier email address exists this facility is being used.

The contractor portal allows contractors the ability to collect works orders via the portal rather than via email or post and includes functionality that allows contractors to update the order with key information direct such as completion dates, variation requests and invoice submission. Used fully this functionality would ensure fast updating of key information within DPHA and will ensure fast authorisation of invoices leading to faster payment to contractors.

A review of the full functionality available via the contractor portal will be conducted in 2024/25 and a decision will be made on which elements to implement. As with the customer portal the initial launch will be a soft one with a small number of selected contractors following which other contractors will be given the opportunity to register to use the portal.

Again, the portal will be fully tested before being launched to ensure the functionality works but more importantly to ensure appropriate security exists to ensure contractors only have access to information relevant to the contracts they are employed for.

It is recognised that some contractors will not have the resources available to use the portal, therefore, although this route will be encouraged wherever possible, contractors will not be forced to use the portal.

Payments to suppliers is already made via bank transfer.

All suppliers will be encouraged to submit invoices electronically if they do not already and supplier remittance advices will be issued via email direct from the system.

5. Staff and Board

The focus of this strategy is the access to and delivery of services using digital technology to drive effectiveness and efficiency. This relates to staff and Board as much as it does to external customers.

The Covid-19 pandemic forced the introduction of digitisation to a degree due to the compulsory work from home instruction from the UK Government. During this period, DPHA provided all staff with laptops and connectivity to business systems that enabled working from home and introduced Microsoft products such as Teams that allowed on line communication and virtual meetings to be held.

These facilities must not be seen as a temporary solution but rather a step towards fully digital services. With this in mind DPHA will continue to move away from legacy and traditional methods of service delivery and communication and look to become digital first in its consideration of ways of working both with the staff and the Board.

There are no plans to relocate or add to the existing offices, therefore the Association's IT support providers will continue to maintain and enhance an infrastructure within the offices that allows office based working but also allows more flexibility through greater use of agile digital solutions. This means that in addition to the internal infrastructure a suitable connectivity will be supplied to ensure flexible work options are available as well as greater use of Cloud based solutions.

Culture

Development of a digital culture or mindset within DPHA is vital to ensure that we fully embrace digital opportunities.

Office based staff already have an ability to work from home if needed, although the norm is for staff to be office based. Due to role constraints some care staff are unable to work from home. During 2024/25 existing desktop computers will be replaced with docking stations allowing connectivity to cores systems when in the office via laptops that can also be used remotely, this includes equipment based at both Sheltered Housing Complexes and DOSCG. Existing laptops will be reviewed for suitability and a standard specification will be implemented by the Association's IT support supplier.

Board members currently have Ipads to allow access to Board papers and DPHA emails. During 2024/25 the devices will be reviewed for suitability and, if appropriate, upgraded or replaced with alternatives.

Members access Board papers via a secure area within DPHA's website. This will continue to be reviewed to ensure that the access is secure whilst providing an easy to access method for Board members. Potential additional facilities such as discussion boards to allow member collaboration on key topics and sharing of information and documents for online feedback.

DPHA has implemented a solution within the Board Room at Beardmore House that enables virtual meetings to happen via MS Teams, Zoom and other virtual meeting platforms. The

technology implemented includes a large screen, camera, microphone and PC. Board meetings are regularly hosted as hybrid meetings and other meetings use the facilities where the solution can deliver required results.

Existing housing and finance are all Cloud based solutions leaving the on premise servers housing mainly payroll, central file and print services. During 2024/25, there will be a project completed to review the existing network folders and files with the aim of moving all documents that need to be retained to a cloud based structure within Microsoft 365 eliminating the need for on premise servers.

However, rather than simply moving all documents that currently is stored the project will look to delete documents that are no longer required and if possible a simplified folder structure will be implemented. The IT support supplier will assist with this project.

Other changes to the way that we work will include the use of SharePoint and Microsoft Teams to share access to files and documents rather than creating multiple copies by emailing or printing separate copies.

To take advantage of the above options and other digital opportunities, DPHA will need to assess the current skills of staff and undertake a suitable training programme. The training and upskilling of staff to reach a digital standard will be a core component of delivering the strategy and will require a partnership approach with our IT Support Provider and other external training providers (i.e. SHARE) to develop the digital skills. DPHA will also ensure that new staff will have relevant IT skills or be provided the necessary training to reach the digital standard.

Delivering the change outlined in this strategy will require the total commitment and active support and leadership of the Board and DPHA Leadership Team to create the right environment and drive forward change.

The outcome will be a workforce that has the digital skills, capability and confidence to excel in the workplace and in everyday life.

Any training requirements identified will be delivered through a combination of internal and external training and job shadowing. Where possible and advantageous shared training with other local housing providers will be considered.

Further development of HomeMaster

The initial phase of the HomeMaster system went live in July 2023. The modules implemented were essential to business continuity as the Association transitioned from the old to the new system

A second and third phase of HomeMaster implementation starting in 2024/25 will include elements relevant to asset management including stock condition information, planned replacement programmes and management of property compliance. This implementation will also consider mobile access to enable connection to the database by staff when on site whether conducting surveys, inspections, interviews or other housing/maintenance related visits.

To assist staff to deliver an agile service equipment will be provided to enable access for officers when working remote. Depending on the role this may be the laptops referred to previously that allows access from anywhere but for housing and maintenance staff additional equipment such as tablets may be more suitable for providing quick access to HomeMaster via secure and easily portable devices.

HomeMaster also has workflow capabilities which allows automation of key processes and proactive management of key actions. Workflow options will be considered during the second phase of implementation where such options will deliver benefit to customers and/or staff. In particular, DPHA is looking to reduce use of paper, therefore, automation of communications via email or SMS will be encouraged.

Further digital communication options such as instant messaging, WhatsApp etc. will also be further considered to offer a wider choice to customers provided this can be offered in a secure way that delivers value for money.

On an ongoing basis potential for improved use of the system will continue by looking to improve the use of existing functionality and to review and where applicable implement new functionality that may be incorporated into future versions of HomeMaster.

Emerging Technology

Much of this strategy focuses on maximising use of existing technology and solutions. Whilst this is given prominence, DPHA will continue to be aware of emerging technology and direction. Assistance in this area will be delivered by DPHA's IT advisors and support providers.

Such technology may include smart technology within DPHA properties and digital communication methods including social media.

Artificial Intelligence, more commonly known as AI, is developing fast in all areas and DPHA will monitor developments in this area that may be beneficial. It is expected that existing suppliers will look to utilise elements of AI in future enhancements to their own solutions, but in addition the Association will discuss with its advisors and support providers emerging options in this area at regular update meetings. All options will be reviewed for suitability and value for money and where appropriate implementations will be planned.

6. Accessibility and Security

To deliver this digital strategy DPHA systems need to be easily accessible by staff enabling access from anywhere at anytime from any device (subject to security restrictions).

With this in mind, as previously described, DPHA will look to move all existing systems to be Cloud based and remove the need for on premise systems and complex connectivity. Colleagues should have the flexibility to access systems from any UK location that allows an internet connection.

This will allow flexibility for some staff enabling a choice of working from home or office, as not all staff can benefit from working from home (i.e. care staff) and allowing easy connection to core systems when staff are at other locations including conferences and customer premises. With appropriate connectivity on mobile devices staff will also have access to system from outwith physical locations, for example when completing inspections or surveys.

Any future systems that are procured will be Cloud based solutions to meet with the above aim.

Moving to a scenario where accessing data and systems is via the internet introduces an element of risk in relation to data security. DPHA will ensure that accessing systems will require multi factor authentication and this will be a requirement for any future system procurement. The Association will also ensure that a penetration test of its IT systems is carried out on an annual basis.

Additionally, password requirements will continue to be reviewed to ensure compliance with recommended best practice including the need for users to update passwords on a regular basis.

Even with additional levels of security, cyber attack remains a threat. As part of the recently procured IT support service, annual penetration testing will be performed to ensure that such threats are mitigated as far as possible and annual disaster recovery tests will be performed to ensure that should an attack be successful DPHA is able to continue to operate seamlessly.

DPHA will also ensure that it achieves Cyber Essentials accreditation and maintains such accreditation each year.

All software used by staff, Board members and customers of DPHA will be properly licenced and a detailed register of all licences will be maintained by the Association's IT support provider. DPHA will also ensure that all software is continually updated to the latest version.

7. Delivering the Strategy

Delivery of this strategy will require the allocation of time and budget as well as the aforementioned commitment to change.

Included within this document is an action plan for the period of this initial strategy. Responsibility for the implementation of the plan rests with the Finance and Corporate Services Manager who will be assisted by the Association's IT advisors and support supplier. Costs associated with the implementation of actions will be included within the annual budget setting process and will be reviewed regularly.

New options and emerging technology will be a standing item on account meetings with the supplier of HomeMaster and with the Association's IT support provider to ensure that relevant options are considered when they arise. The full strategy and action plan will be reviewed annually.

8. Review

It is recognised that modern technology changes at a rapid pace. This initial strategy covers a three year period but requirements and plans may change during this period. The strategy will be reviewed annually by the Board as part of the budget setting process.

The Association's main IT system supplier, advisors and support providers will all input into the review to ensure all potential options are considered each year and the updated strategy is appropriate for the Association and its stakeholders.

9. Action Plan

Task	Target Start	Target Delivery
Soft Launch of Customer Portal	December 2025	January 2025
Full Launch of Customer Portal	March 2025	June 2025
Provide Training to Customers on Portal (as needed)	June 2025	March 2026
Soft Launch of Contractor Portal	January 2025	March 2025
Full Launch of Contractor Portal	March 2025	June 2025
Implementation of Docking Stations to all staff	September 2024	October 2024
Review Board Member IT Requirements	December 2024	February 2025
Move Folders and Files to MS 365/Cloud	October 2024	March 2025
Obtain Cyber Essentials Accreditation	September 2024	March 2025
Identify Staff Training Requirements	October 2024	December 2024
Deliver Identified Staff/Board Training	September 2024	December 2024
Sheltered Housing Community Alarm – fully digital/maintenance agreement	September 2024	March 2026
Implement Asset Management on Homemaster	July 2025	December 2025
Remove on-premise servers	August 2025	November 2025
Complete Annual Penetration Tests	March 2024	October 2026
Complete Annual DR Tests	December 2024	October 2026

10. Data Protection

We will treat personal data in line with our obligations under the current data protection regulations and our Privacy Policy. Information regarding how data will be used and the basis for processing data is provided in our Customer Fair Processing Notice.

11. Equality & Human Rights

We are committed to promoting an environment of respect, understanding, encouraging diversity and eliminating discrimination by providing equality of opportunity for all. This is reflected in our Equality and Human Rights Policy.

12. Complaints

Although we are committed to providing high levels of service, we accept that there may be occasions where you may not be satisfied with the service you have received from us. We value all complaints and use this information to help us improve our services. Our Complaints Policy describes our complaints procedure and how to make a complaint.