



# Spotlight Report on: Knowledge and Information Management (KIM)

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Developing an Action Plan

Prepared by Golden Marzipan,  
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**Golden**  
Marzipan

Manual and electronic records should be easy to find, manage and dispose of, when necessary. Good record keeping starts when you create records and continues through to deletion. Classifying, categorising and indexing new records can help with this. It also helps to keep a record of where you store information.

The aims of the emphasis on good record keeping in this strategy are:

1. A change in culture and mindset, in which our record keeping is fundamentally about us and the trust placed upon us by our tenants.
2. To realise the enormous potential benefits of information to improve our safety and quality of homes, safeguarding and health outcomes.
3. Information regarded as a professional service in its own right for us all – with appropriate support in using information available for those who need it, so that information benefits everyone and helps reduce inefficiencies.
4. Information used to drive integrated services improvement both internally and with partner organisations.
5. Information recorded once, at our first contact with professional staff, and shared securely between those who need it to enable data to flow between systems whilst keeping our confidential information safe and secure.
6. A culture of transparency, where access to high-quality, evidence-based information about services and the quality of care held by Government and agencies is openly and easily available to us all.
7. The widespread use of modern technology to make our services more convenient, accessible and efficient.
8. To provide insightful information to managers, trustees and funders.

For most of us, record keeping is a key part of everyday practice. Doing it well and ensuring we meet the required standards is fundamental to effective services. Ultimately if no record is made, the agencies we work with may consider the events not to have happened.

We live in a world where hand-written notes are becoming a thing of the past and electronic record keeping is commonplace. Electronic records make handwriting misunderstandings redundant and facilitate improved communication across the organisation.

Hand-held devices allow records to easily be updated on the go. Shared records and the sharing of records can greatly improve communications across the organisation, while also ensuring tenant confidentiality is maintained, where necessary.

The housing management system should be the primary system to maintain records about properties, landlords, tenants, suppliers, repairs, maintenance, rent and service charge income.

SharePoint could be the primary storage library for all documents, correspondence, certificates.

Important notes from telephone calls, emails and any other contact with a resident or their advocates will be noted in the CRM of the housing management system and a copy of any relevant notes (e.g. withing emails) stored in SharePoint.

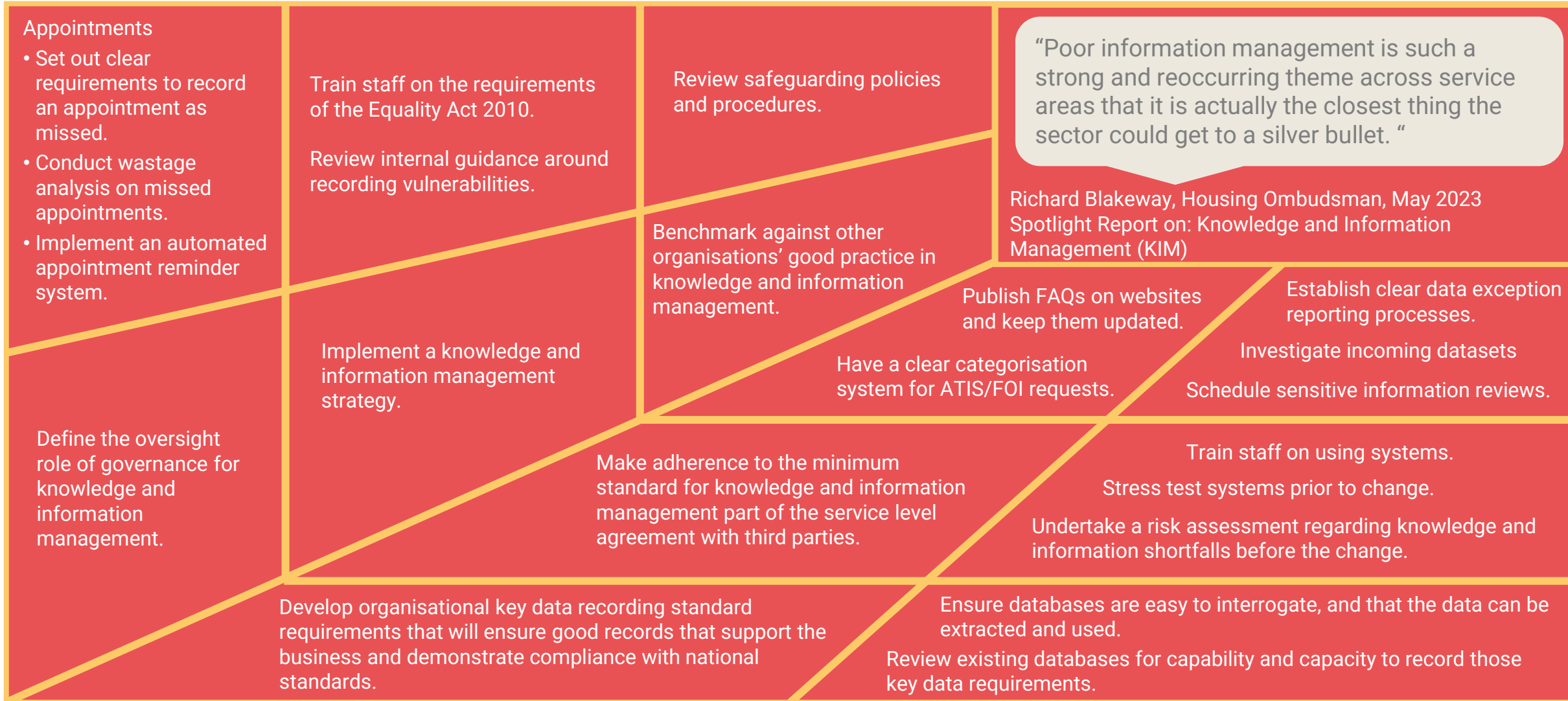
Good record management is the legal record of the interaction with, and assessment and treatment of, the tenant. If it's not written down it didn't happen!

**It is important for effective safeguarding and communication for everyone working in social housing organisations.**

*Cover photo by Photo by Ahmed Hasan on Unsplash*

# Knowledge and Information Management (KIM) Action Plan

Customer Experience  
Governance and Culture



Data Standards

ICT Systems

# What is a record?

Classification	Example	Information Required	Documents	Notes
Contact	Tenant, Landlord, Supplier, Colleague	Name and address Contact details, vulnerabilities	Application, Tenancy	Personal and confidential information
Property	Homes of tenants, type of building	Landlord, type, bedrooms, year built	Survey, Contract	Checked by surveyor
Components	Roof, bathroom, kitchen, heating, windows	Heating type, installation dates, condition, lifespan	Survey, Specification	Periodic survey
Safety records	Fire, gas, electrical, legionella, radon, damp/mould, EPC	Periodic checks, certificates and actions required	Survey, Certificates	Linked to property and contact
Repair	Repair or improvement to property or component	Details of cause, dates reported and actioned, appointments, cost and satisfaction	Order, Survey, Photographs	Communications with supplier / contractor
Payments	Income: rents and service charges	Date, amount, period, method	Receipts, Benefits	Relating to tenant, amounts owed (arrears)
	Expenditure: goods and services received	Date, amount, supplier, service receipt, location of goods	Invoices, Purchase Orders	Stock control and depreciation
Case	Complaint, ASB, H&S breach, visit by government agency	Event, incident, or action requiring further consideration	Form / Letter	Responsibility for resolving