



Portus
Supported Housing

2026-29 Corporate Plan

Safe spaces for independent living

Corporate Objectives

The following pages provide an overview of the seven objectives at the centre of the Corporate Plan. Each objective follows a theme described as key by the Boards of the two legacy entities and assumed into the Detailed Business Case approved by those Boards. It also draws on actions that have been agreed as part of the Customer Strategy, Asset Strategy, IT Strategy and Data Strategy.

It details specific actions that will be achieved over the next 3 years and identifies in which year actions will take place and the evidence that Board will expect to see to be assured that the corporate plan remains on target for completion.

The Executive will report to Board periodically on progress, to provide reassurance that Portus Supported Housing (PSH) remains on course to meet its objectives. The plan can be reviewed and amended by Board at any time, following decision on a change of strategy or risk appetite.



Objective 1:	Governance and Compliance			
Overall Objective	At the end of year 3, PSH is a compliant business			
Descriptor	PSH has done all considered necessary to be assessed as compliant, have undertaken a full regulatory submission and having worked openly with the RSH through a Regulatory Inspection to agree a positive outcome. Any required improvements from the inspection have been delivered or are part of a long-term agreed plan. PSH has responded effectively to all regulatory change arising through the period.			
	Specific goals	Stages	Timing	Change and Outcome Measures
1.1	PSH has a balanced and well-managed Board	Develop succession plan and recruit for Board members approaching end of tenure The PSH Board is fully populated, underpinned by a Board development plan, annual personal and Board wide reviews and with clear succession planning Establish formal governance and reporting arrangements for subsidiaries and intra group relationships including clarifying terminology, roles and documentation	Year 1 Annually Year 1	Board members recruited and in place Diverse and effective Board for duration of period reviewed annually Formal documentation approved at GARC, CC and Board
1.2	PSH is compliant with NHF CoG 2020	Complete annual assessments and any actions arising	Annually	3 annual declarations of compliance
1.3	PSH has a fully funded Business	Cash coverage for all planned activity, business/infrastructure investment and sinking	Annually	Assurance of adequate forecasted cash position, stress and scenario tested, with

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	Plan	fund contributions		clear contingency plans
1.4	PSH has completed the agreed route to RSH compliance work, undertaken a regulatory inspection and completed all arising actions.	All identified gaps to compliance with 7 standards completed All specific strategies expected are finalised and in flight Full regulatory submission completed and grading confirmed Any action plan arising completed and resolved with RSH in readiness for future timetabled regulatory inspection	Year 1	Board formally confirms assurance of compliance with RSH standards and seeks RSH engagement to restore compliant status. Ongoing performance reporting to Board; effective and timely remediation of any shortfalls throughout period
1.5	PSH has a single, independently verified approach to rent setting and market rent testing	PSH policy established and agreed at Board Rent setting approach harmonised by 2027/28 rent review cycle Market rent testing harmonised and applied across portfolio by 2029 / 30 rent review.	Year 1 Year 2 Year 3	Clarity for Board, regulator and commissioning/Housing benefit-related providers. Consistency in application across all social housing units.
1.6	PSH agrees detailed plan for compliance with EPC 'C' by 2030, with implementation on target by period end	All properties assessed for energy performance and improvement planning where required. Improvement plans to achieve compliance with regulatory thresholds/timelines in flight and on track. Funding negotiations with superior landlords completed.	Year 1-2 Year 2-3	All properties are on track to be EPC C rated by 2030 and PSH has a documented approved strategy to continually improve overall carbon footprint and to achieve any legally defined objective for EPC 'C'. Grant funding and / or landlord support maximised and secured for site investment
1.7	PSH's customers are engaged in PSH	Customers and other stakeholders are appropriately engaged and involved in the	Year 1	Customer committee operational and outcomes embedded in Board decision-

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	decision-making	operation of PSH's business	Year 2	making. C-sat systems for repairs and maintenance embedded alongside TSMs
1.8	PSH establishes minimum cash holdings rules and maintains sufficient financial reserves to pass stress tests from year 2	PSH have access to sufficient reserves and ring-fenced funds to wind the organisation down in a controlled way over 36 months.	Year 1 Annually	Establish Living Will, financial Golden Rules and treasury policies for 3-year wind down Annually tested living will / wind down model and report to Board
1.9	PSH has delivered an operating surplus across the period in line with annual budgets	Excluding the one-off costs of merger and launch of PPM during the period, PSH will deliver an operating surplus of: • 1.6% (FY27), • 4.6% (FY28) and • 4.7% (FY29)	Year 1 Year 2 Year 3	Financial yearly results.
1.10	PSH has a managed strategic view of risk	PSH develops a holistic policy and framework appropriate to manage risk for PSH (group), an appropriate strategic risk appetite, profile and management/mitigation plans for key and strategic risks	Year 1	Board assurance that risk is understood and positively managed within an overall risk appetite. Existence of register, action plan and delivery evidence. Formal annual review from GARC.

Objective 2:	Customer Engagement & Involvement			
Overall Objective	At the end of year 3, PSH has delivered the defined Customer Strategy			
Descriptor	PSH has a clear, published customer strategy, service scope and structured model for delivery. Service scope is flexible dependent upon the needs of the service user/CP. Service delivery is measured (quantitative and qualitative) and consistently considered as distinctive for PSH.			
	Specific goals	Stages	Timing	Change and Outcomes Measures
2.1	Assist the CC to deliver against an agreed three-year plan.	Establish Customer Committee brief, extend membership to ensure full coverage and agree 3-year plan of focus. Define, agree and implement wider customer engagement / involvement approach. Agree and provide required support to ensure delivery	Year 1 Year 1 Year 1	Effective representation of customer voice in key related decision-making in PSH.
2.2	Publish Customer Committee to all stakeholders and develop delivery plan.	Draft and agree 3-year delivery plan for PSH Customer Strategy Deliver against agreed plan	Year 1 Year 2 and onwards	Measurable/Measured delivery of a quantified improvement programme for customer delivery. Customer voice and scrutiny embedded in customer delivery specification and delivery. Evidence of feedback being used in changes to service

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				delivery and services offered, with improved outcomes in future feedback.
2.3	Develop and deliver operational roadmap for embedding Customer data into engagement and delivery activities.	Inform and utilise Data Strategy objectives and plan to define a capability, staff training and process development plan to maximise the benefit of managed customer data to service outcomes and efficiency. Deliver plan and show benefits for customers	Year 1 Year 2 and onwards	Evidenced embedded capability of specifying service to individual needs.
2.4	Develop and deliver a staff training programme to improve knowledge and understanding of Customers, the broader customer service delivery model and PSH part in it.	Develop (year 2) and Provide (year 3) ongoing training on • understanding and working with vulnerable customers, working with Care Providers and commissioners. • social care and health model and PSH role in it. • Front line property management & health and safety.	Year 2+3	Increased professionalisation of PSH service.

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2.5	Develop and embed systemic qualitative and quantitative measures of customer experience and satisfaction	Work with CC to define most effective routes to quality data on customer experience. Agree approach and expected outcomes Initial focus upon customer/appointee face-to-face feedback with HOs, embedding frequent customer stories to align with Repairs' service metrics and support TSM data. Investigate value of additional remote/independent CSat/NPS service.	Annually Year 1+2 Year 2	Improved customer and employee engagement and involvement
2.6	Benchmark the quality and cost of our services to others in the SSH sector	Work with an independent partner (Acuity) to understand options for benchmarking Develop a benchmarking approach to apply to PSH. Implement as part of corporate reporting. Establish methodology to evidence cost saving compared to NHS and social care model	Year 1 Year 2 Year 3 Year 3	Supported VFM and improved cost management focus.

Objective 3:	Systems and Data			
Overall Objective	At the end of year 3, PSH is a systems and data-led business, having implemented a scalable architecture and the delivered the data use, management and protection strategy			
Descriptor	PSH has defined and built all direct and supporting capabilities required to become a stellar and large-scale provider of SSH			
	Specific goals	Stages	Timing	Measures
3.1	PSH has a designed systems and data architecture to underpin the business and a plan to achieve both	Agree medium-term systems architecture Agree data management, use and protection strategy, including underpinning systems, policies, rules and procedures. Finalise agreed implementation plan (order and timeline). Implement system changes as follows: • Tender for HMS to replace SaSSHA. Implement (FY 28) • Implement HMS system • Implement Data Logic and Power BI (FY27/8) • Migrate from PODIO (FY28) Review outcomes and refine implementation	Year 2 Year 1 Year 1 Year 2 Year 2 Year 2 Year 3	Legacy, unconnected and local systems removed from architecture. Scalable, modern technologies in place to support improved control, services, customer understanding and asset management.
3.2	PSH has appropriate	Assess requirements and options available; recruit	Year 2	PSH has resilient ICT support services, with

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	ICT management capability – insourced or outsourced	and/or procure longer-term services		capability sufficient to support PSH through the material change plan.
3.3	PSH ICT infrastructure is robust and secure	Review all resilience, security, DR (and BC) requirements and ensure the appropriate level of risk management.	Annually	Assured and tested capability clearly documented and reviewed yearly
3.4	PSH Systems and Data allow detailed customer understanding, performance analysis and management	Develop and agree a data management, use and protection strategy. Appoint and train data manager and data owners. Reconsider and consolidate all data policies from pre-merger into single data policy and process suite. Implement toolset, data management capabilities and processes using Data Logic as core data-management system.	Year 1 Year 1 Year 2 Year 2	PSH can evidence complete data management and effective use of data in engaging stakeholders and enhancing controls, services, reporting and intelligence.

Objective 4:	Strategic Asset Management			
Overall Objective	At the end of year 3, PSH has successfully launched and implemented Portus Property Management and all associated capabilities. PSH has defined and is delivering a fit-for-purpose long-term asset management strategy agreed and in-flight			
Descriptor	PSH provides long-term homes for vulnerable adults that are safe, secure and appropriate for their needs. PSH has a property management capability to ensure homes remain safe and appropriate for their intended use and understands changing customer needs and reflects this in their homes management plan. PPM delivers cost effective and high-quality repair services, aligned with its business case, and delivers consistently to agreed service level agreements			
	Specific goals	Stages	Timing	Measures
4.1	PPM delivers services to expected standards and budgets throughout.	Successfully operate all services without interruption/material service dip. Define PPM three-year plan to include service scope both internal and external Implement 3-year plan	Year 1 Year 2 Year 3	Business Case delivered.
4.2	PSH (client side) has a comprehensive strategic asset management capability	PSH will establish a Strategic Asset Management Strategy and resources that incorporates asset assessments, longevity planning, economy, use, geography, financial efficiency, energy performance and suitability for long-term use and flexibility for that customer/cohort. PSH will establish an effective service management capability to manage PPM delivery	Year 1 Year 1	Board approved long-term plan

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4.3	PSH has a comprehensive strategic asset management plan	PSH will establish a structural asset maintenance plan that incorporates responsive repairs, health and safety compliance and planned maintenance. It incorporates: • Reconsideration of specific standards and specifications for all standard jobs • Delivery strategy for Planned Maintenance (in-house management vs specific procurements vs third party master contractor) • Delivery strategy for Energy Performance Improvement programme (in-house management vs specific procurements vs third party master contractor) • End-to-end process review to ensure efficiency, VFM and appropriate allowance for customer specific needs.	Annual increments Year 1 Year 1 Year 2 Year 2	Delivery of all stages, with outcomes deliverable in BP cost envelope
4.4	PSH has delivered all committed planned works within budget and quality	Includes all planned works programmes and a defined, scoped and costed energy Performance Improvement Programme. The latter includes direct engagement with landlords on funding and grant funding. All sites below EPC 'C' surveyed and a remediation plan in place. All appropriate landlord negotiation and grant securing work complete. Works to remediate underperforming sites underway and on track for completion by 2030.	Annually Year 2 Year 3 and beyond	All sites continue to be reviewed, and future schedule and costs updated yearly to inform annual plans

Objective 5:	People & Process			
Overall Objective	At the end of year 3, PSH has delivered against the employee plans in the DBC and is an employer of choice for this sub-sector, with employees who understand and have a direct connection with our Vision and Values			
Descriptor	PSH are a learning and capability-based employer, with a strong employee offer and a balanced and diverse workforce.			
	Specific goals	Stages	Timing	Measures
5.1	PSH has a strong employee offer	PSH to ensure employee offers provide employees value vs those employed elsewhere in the SSH sector. PSH will operate a comprehensive performance management and development programme across all employees. 1-1 and PDR process launched 1-2 Staff development including requirements of Competency and Conduct Standard	Annually Year 1 Annually	PSH will aim to be a median'+’ payer where practicable All roles' performance and contribution to be measured in terms of contribution to Purpose and operation of PSH Values
5.2	PSH will support the development and adoption of a new, customer-focused culture across all employees	PSH to implement a year-long performance-based culture development programme for all staff in Year 1 (with MGI Learning). PSH leadership to embed Vision and Values into PSH management and decision-making processes. Identify appropriate training for all staff to meet	Year 1 Year 1	Development of PSH culture and operating identity. Establishing performance and professionalisation requirements throughout the organisation. Qualified through routine staff feedback sessions

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		the requirements of customers and the business		
5.3	PSH will support the development and professionalisation of its employees	PSH to provide an annual budget to support professional membership and professional/technical qualifications throughout the period. Programme to be employee led, moderated by Exec. PSH will fund mandatory qualifications and part fund relevant voluntary qualifications to extent of budget available.	Annually	All professional staff on a formal development path; all regulatory requirements met. Staff eligibility and completion tracked
5.4	PSH will ensure there are safety systems in place to protect staff and others, especially field-based staff	PSH will implement improved site visiting and lone worker systems and field staff monitoring systems.	Year 1	Monitoring and reporting of internal KPIs to line managers. Annual summary provided to Board

Objective 6:	Growth & Consolidation			
Overall Objective	At the end of year 3, PSH will have an agreed long term growth strategy and will have scaled to 2500 units of compliant and effective stock located in chosen geographies.			
Descriptor	PSH will have grown appropriately, in the agreed geographies and at the appropriate margin. PSH will also continue to consolidate/agree remediation for legacy leased stock that underperforms and/or those properties that are unlikely to be fit for purpose over the long-term.			
	Specific goals	Stages	Timing	Measures
6.1	PSH has a long-term growth and diversification strategy and is delivering against it.	Develop and agree a strategic long-term growth and diversification plan and funding strategy with Board (including model types, diversification, property types, geographies, partner criteria, scale) and an in-house capability to deliver against it. Undertake alternative sources of finance analysis for procured/developed assets. Implement first phases of diversification strategy	Year 2-3 Year 3 Year 3-4	Committed plan to rebalance funding risk model over the longer term. Early delivery of owned asset by year 3-4.
6.2	Ongoing consolidation of 'not fit for purpose' assets across legacy portfolio	PSH will implement ongoing assessment of each asset against long-term viability in line with the Asset Management Strategy (operational and financial) and will have a rolling plan of remediation/consolidation with landlords). Initial focus will be upon finalising the ex-Parasol portfolio and Civitas 'Tranche 2' properties and the remaining private landlord portfolio. A wider analysis	Year 2 Year 2	Properties already identified as going back to their landlords are either handed back or issues remediated

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		of all leases will begin		
6.3	PSH has grown by an average of 50 units per year through the period.	At least 50% of growth is new-to-market business (excluding any potential portfolio transfers to PSH) Adopt/amend the historic growth process in place to create a pipeline to ensure the target of net 50 units growth per year that is required in the agreed budget and business plan, is met. High level parameters for potential stock transfers opportunity are agreed – eg lease terms, master agreement, sinking fund requirements, legacy funding.	Annually Year 1 Year 1	Pipeline of properties in place to meet agreed budget and plan requirements

Objective 7:	Capability & Contribution			
Overall Objective	At the end of year 3, PSH will be established as a leader and as a force for good in the SSH Sector			
Descriptor	PSH will work with peer companies, funders, Care Providers and other stakeholders to the provision and management of SSH to seek to improve standards in all areas and to help in developing and delivering stronger, better risk-balanced and more cost-effective solutions for our customer cohort.			
	Specific goals	Stages	Timing	Change and Outcome Measures
7.1	PSH has a structured marketing and communications plan.	PSH will actively manage our public brand and reputation, through communication of strong performance, active engagement with wider stakeholders and publication/messaging through PSH's online channels Develop external comms plan	Annually Year 1	Formal Comms plan and capability in place, supported by external capability. All key senior staff media trained. Costs of change - £36k per year (comms support)
7.2	PSH continue to drive wider networking across lease-based providers of SSH	PSH will act as facilitator for peer RPs to look to build improved service standards, legacy portfolio risk mitigation, new model development and sector SSH compliance.	Annually	Measures to be agreed
		PSH will work with peer RPs to define and agree business cases for geographic (footprint) consolidation	Year 2+3	Measures to be agreed
		PSH will work with other RPs to agree scope and	Year 2+3	Measures to be agreed

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		benefits case of centrally delivered corporate services and/or technical leadership served from one or more peers.		
7.3	PSH partners with quality CP's and drives strong, positive relationships for the benefit of customers.	PSH will assess and review all CP partnerships and seek to work with good quality providers and grow with the best partners only. PSH will work with key partners to build a strategic partnership to contribute towards development of improved services for customers	Annually	Measures to be agreed
7.4	PSH will achieve an appropriate corporate accreditation	PSH will agree with Board accreditation priorities	Year 2	IIP / Bus Excellence / IoCM / ISO / CIH / HQN
7.5	Work with commissioners and customers to ensure current and future projects meet the needs of the sector	Future development and disposal decisions are based in part on feedback from customers and commissioners	Annually	Evidence of feedback

