



# Five-Year Strategic Plan

2019 – 2024



“...there is no standing still –  
we are either going forward  
or we are going backward.”<sup>1</sup>

**William Lever**





# CONTENTS

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1. <i>Foreword</i>	4
2. <i>Developing a five-year plan</i>	6
3. <i>About Port Sunlight Village Trust</i>	7
4. <i>The significance of Port Sunlight</i>	8
5. <i>Port Sunlight today</i>	10
6. <i>Strengths, challenges &amp; risks</i>	18
7. <i>Making difficult decisions</i>	19
8. <i>A new direction</i>	20
9. <i>Delivering a plan for the future</i>	24
10. <i>Conclusion</i>	30

## PORT SUNLIGHT VILLAGE TRUST

### SECTION 1

# FOREWORD



What would William Lever think of Port Sunlight if he was alive today? Would he be pleasantly surprised that 130 years after its founding the village and factory he created retain so many of the landscapes, buildings, monuments and amenities that he fastidiously planned? Or would his restless need for improvement inspire him to replace the existing arts and crafts-inspired homes with the latest ultra-modern, energy efficient, open-plan townhouses? As the man himself said, “there is no standing still – we are either going forward or we are going backward”.<sup>1</sup>

Obviously, we cannot know the answers to these questions, but as guardians of Lever’s vision for the village, Port Sunlight Village Trust (PSVT) is acutely aware of the responsibilities we shoulder. That duty is not just to conserve and promote Lever’s architectural and social legacy, but also to meet the needs and aspirations of the people who live, work and visit here.

However, it must be remembered that this is not a solo undertaking but is a responsibility and privilege PSVT shares with our fellow village stakeholders.

**PSVT shares many of Lever’s aims and values and will pursue them with the energy and success of the man himself. Port Sunlight embodies Lever’s beliefs in coupling social responsibility with business acumen, and in providing affordable homes in a beautiful setting. He wrote of Port Sunlight: “...it was an ideal garden city, and was undoubted proof that the housing problem could be solved even by private enterprise”.<sup>2</sup> PSVT will continue to adhere to that philosophy, conserving what we hold most dear. We will also protect and make better use of our green and communal spaces, which Lever saw, and we continue to see, as being conducive to good health and well-being.**

Like PSVT, Lever saw the potential of visitors to boost Port Sunlight’s prosperity. The village is already a popular tourist destination, but we know that we can do more to raise the profile of this ‘hidden gem’, attracting visitors with a fascinating, joined-up and sustainable offer that works for the benefit of tourists and residents alike.

‘This strategy articulates our new vision for the village, one which capitalises on our shared heritage but also seizes new opportunities.’



And through that increased tourism, and coupled with innovative exhibition and learning programmes, we will teach the world about Port Sunlight and its creator, making his physical and social legacy accessible to all.

Attracting a younger demographic will be an important part of that tourism drive, but the same can also be said of efforts to diversify the profile of our residents. Lever recognised the importance of demographically-balanced communities, with an ideal blend of young and old, families and couples/singles. However, just like Lever and subsequent village custodians, PSVT struggles to achieve that diversity and recognises that we must give younger people and families more reasons to move to and then stay in our village.

However, there are many modern pressures that Lever certainly did not envisage, climate change and ever-rising tourist expectations being just two. And unlike Lever Brothers' finances, PSVT's are not limitless. In short, while we seek to sustain the ethos that made and makes Port Sunlight such a wonderful place, we cannot ignore the fact that the world has much changed since the days of Sunlight Soap. However, just as Lever saw potential in the marshy, tidal land on the banks of the Mersey, so should we see opportunity in our challenges.

Our strategy is the culmination of much thinking, talking, observing and consulting by so many people concerned with the future of Port Sunlight, including residents, businesses, visitors, staff, volunteers and board members. We are grateful to you all.

***This strategy articulates our new vision for the village, one which capitalises on our shared heritage but also seizes new opportunities. To realise it, PSVT must display some of Lever's entrepreneurial drive and imagination, so that together with you, our stakeholders, we can create a place which is both a homely, inclusive, welcoming village and an internationally-renowned, financially-successful heritage site.***



**Paul Harris,**  
Chief Executive



**Rob Young,**  
Chair of the Board

SECTION 2


# DEVELOPING A FIVE-YEAR PLAN


This plan sets the strategic course for Port Sunlight Village Trust (PSVT) over the next five years, from 2019/20 up to 2023/24. It embraces a dynamic 21st-century vision for PSVT and this unique village, highlights the opportunities and challenges that PSVT faces, and outlines how it proposes to address these.


**PSVT consulted a wide range of audiences, stakeholders and partners in the production of this plan and conducted an in-depth research programme. Arts Council England funding also supported the strategy's development which will enable PSVT to:**


- **DEFINE** PSVT's exciting new role and purpose,
- **PRIORITISE** how it uses its limited resources,
- **IDENTIFY** new income sources and develop a sound business model,
- **ENSURE** its workforce is happy and fulfilled, with the appropriate skills and expertise,
- **ESTABLISH** the right strategic partnerships, and
- **LEARN** from others.


**When conducting this research PSVT considered many factors:**


 **SOCIAL INFLUENCES**  
 Changing national and local demographics; the demand for new services around health, well-being and social isolation; increased visitor expectations, and commercial opportunities.


 **TECHNOLOGY**  
 Assistive technologies, digital communications, green technologies and growing customer expectations.

 **ECONOMICS**  
 Pressures on public funding and increased competition amongst funding recipients; the conclusion of the Unilever Covenant in 2022/23; the changing economic climate, and the local visitor economy.

 **THE ENVIRONMENT**  
 Environmental policy, climate change and conservation vs modernisation.

 **POLITICS**  
 Changes in policy and legislation, Brexit, local regeneration and funding cuts.

 **LEGAL FACTORS**  
 Health & safety, charity and company law, housing and employment legislation.

 **ETHICS**  
 PSVT's role as a private landlord and maintainer of public spaces, and changing conservation philosophy.





### SECTION 3

# ABOUT PORT SUNLIGHT VILLAGE TRUST

PSVT is an independent charity founded in 1999 by Unilever plc. to take over functions previously managed by Unilever's Estates Department. All village assets still in Unilever's ownership were transferred over to PSVT.

This currently includes 292 residential properties, 16 community and commercial buildings and the amenity landscape.

Since PSVT's creation Unilever has provided an annual grant to support the charity to become a financially strong, independent organisation. This financial support will continue up to 2022/23 and will provide PSVT with an opportunity to implement a number of major capital projects and other key business objectives.

**PSVT's other main source of income comes from its substantial tenanted housing stock as a private landlord. It also:**

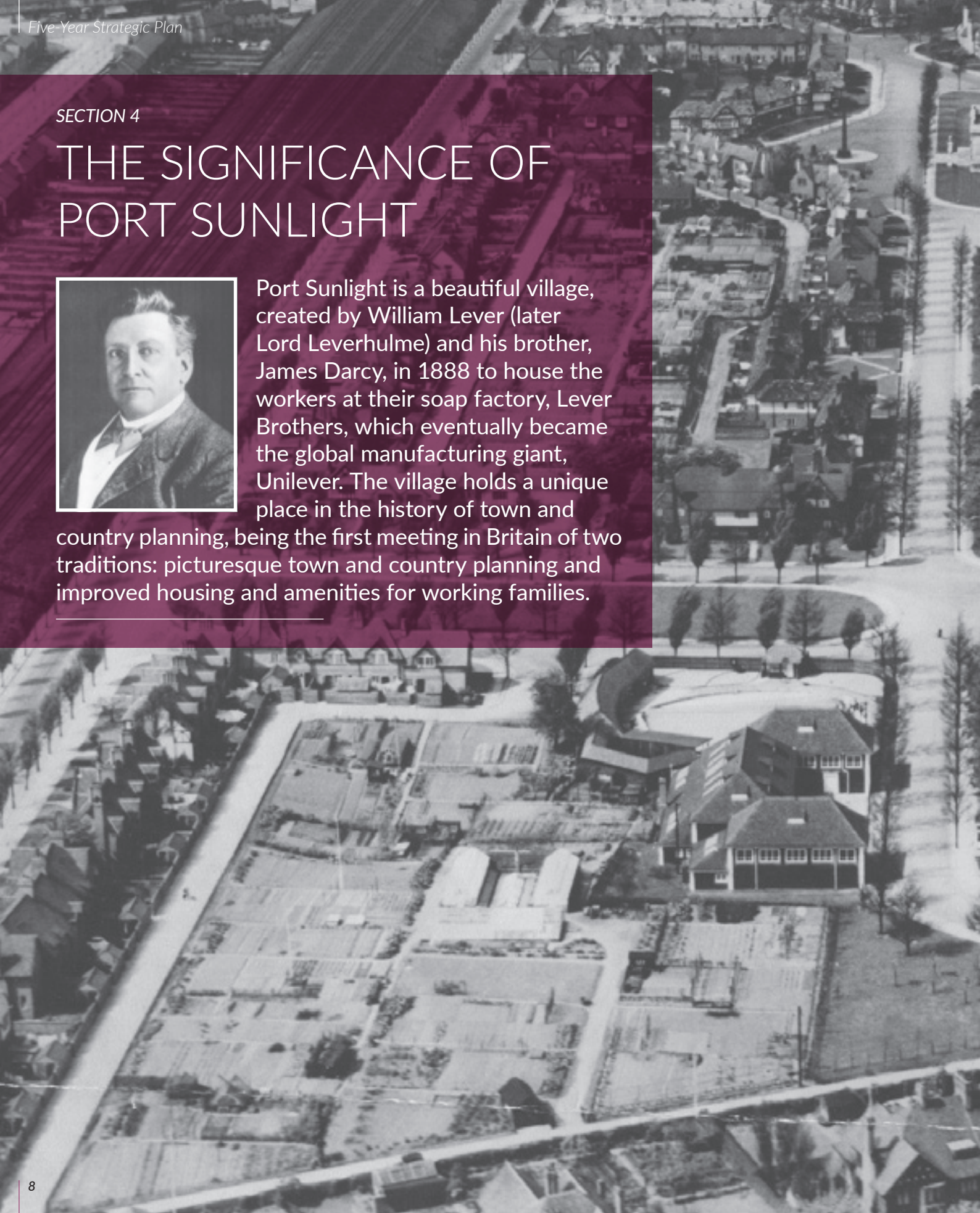
- **maintains** the village landscape,
- **operates** the popular and award-winning Arts Council-Accredited Port Sunlight Museum, including the Edwardian Worker's Cottage Experience,
- **cares** for the museum's important collection,
- **runs** a tea room, gift shop and community hub,
- **works** with village residents to tackle social issues and promote community spirit and cohesion,
- **looks** after a diverse group of community, commercial and listed structures including a war memorial and an elegant fountain, and
- **promotes** the village as a visitor destination and plays an active part in the wider visitor economy.

SECTION 4

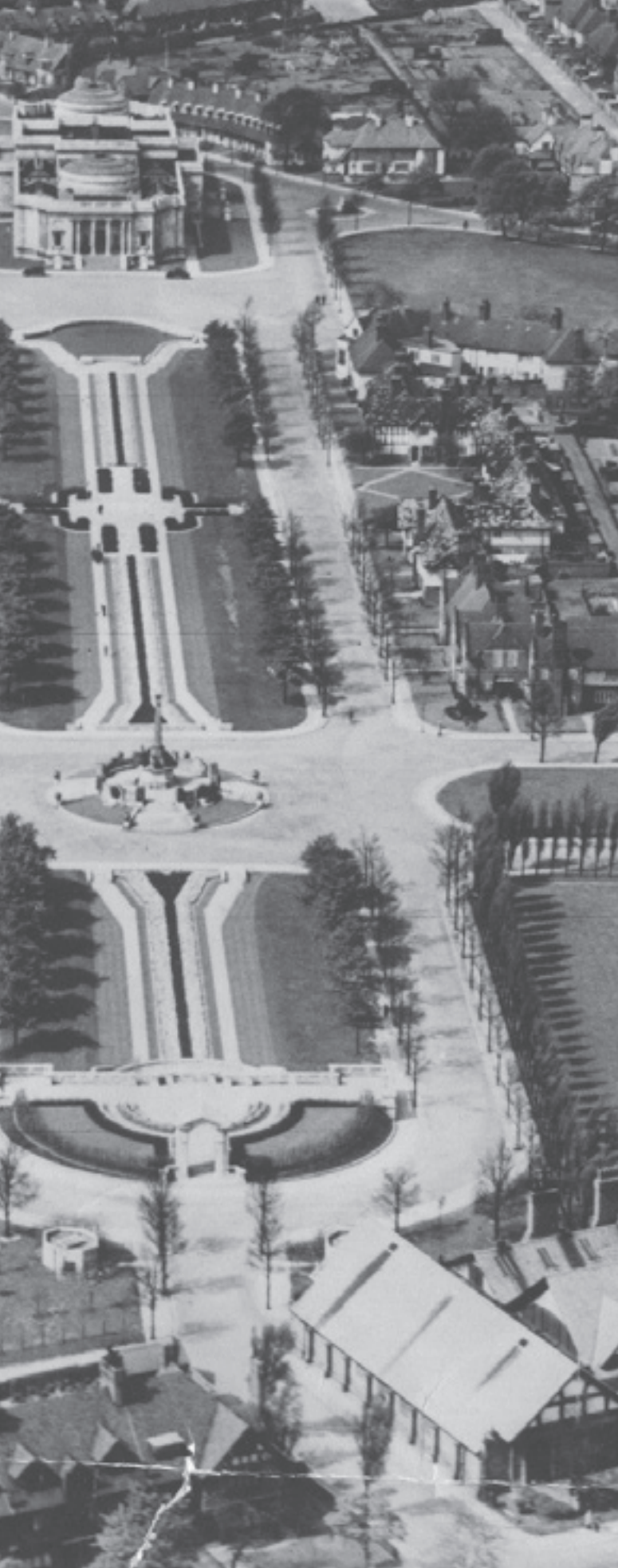
# THE SIGNIFICANCE OF PORT SUNLIGHT



Port Sunlight is a beautiful village, created by William Lever (later Lord Leverhulme) and his brother, James Darcy, in 1888 to house the workers at their soap factory, Lever Brothers, which eventually became the global manufacturing giant, Unilever. The village holds a unique place in the history of town and country planning, being the first meeting in Britain of two traditions: picturesque town and country planning and improved housing and amenities for working families.







Port Sunlight was built by Lever in response to the appalling living and working conditions he witnessed in the second half of the 19th century.

However, rather than a philanthropic venture, Lever described it as a business model based on the premise of 'prosperity-sharing'. Instead of distributing company profits to his employees, Lever provided workers with good homes and access to healthcare, education and leisure activities. There are no regimented rows of utilitarian terraces in this village, indeed, Lever said:

“...the laying out of the towns and the planning of streets lie at the very root of the happiness of the people.”<sup>3</sup>

He intended to make his employees' and their families lives secure and comfortable, to enable them to flourish as people, and to inspire loyalty and commitment. Throughout his life, Lever also campaigned at a national level for better welfare and a shorter working day for working class people. He introduced workplace pensions, supported education and financed medical research.

Lever's lifelong passion for art and architecture can be seen throughout the village, from the fine craftsmanship and traditional architectural materials to his antique and fine art collections displayed in the Lady Lever Art Gallery.

All of these features have helped cement Port Sunlight's significance within the UK's history of planned communities, and influenced developments home and abroad. Indeed, the movement has renewed relevance as a consequence of the UK government's plans for a new generation of garden villages.<sup>4</sup>

SECTION 5

# PORT SUNLIGHT TODAY

The village, which became a conservation area in 1978, includes 900 Grade II-listed buildings within 130 acres of beautiful parkland and gardens, and enjoys national Green Flag and Green Heritage Accreditation. Until the 1980s, all village residents were employees or related to employees of Unilever, however, divestment of many real estate holdings resulted in nearly two thirds of the houses being sold. In 2019, the Port Sunlight population was estimated to be 2,065.

‘...each year the village welcomes about 300,000 visitors...’

Today, Port Sunlight is an important global hub for Unilever with manufacturing, IT and research and development co-located here. Its stately, Grade II-listed office building, Lever House, is a historic gateway to the modern facilities behind the original factory wall. The village is also home to a small number of service sector businesses, primarily located in Port Sunlight’s fine public buildings.

Port Sunlight has always been a visitor destination, and it is estimated that each year the village welcomes about 300,000 visitors who come for the fascinating social history, beautiful setting and world-class art. They admire significant architecture including Christ Church, the Lady Lever Art Gallery, the striking Grade I-listed war memorial, ‘Defence of the Home’, and the imposing Leverhulme Memorial. These landmarks sit proudly amongst broad, tree-lined avenues, green open spaces, two registered landscapes and ‘comfortable and cosy’ period architecture.

The village is well-located for access to the rest of Liverpool City Region, West Cheshire and North Wales. Both residents and the wider local community are well-served by leisure, community and social facilities.



# THE LOCAL CONTEXT

The economic, tourism, social and community environments inform how PSVT operates today but also how it might target its resources in the future.

The local economy is a very mixed picture:

## £4.9bn

**Wirral's GVA (Gross Valued Added):** £4.9bn per annum in 2017, i.e. 15.9% of the region's total economic value,<sup>5</sup> and in 2017 the lowest GVA per head in England.<sup>6</sup>

## 322,800 people

**Wirral's residents:** 322,800 people<sup>7</sup>, however, that is an ageing population with fewer people than average of working age.<sup>8</sup>

## Challenges

**Employment:** more than the national average of working-aged people claimed an out-of-work benefit in 2016.<sup>9</sup> Neighbouring New Ferry is one of the most disadvantaged areas in the UK.<sup>10</sup>

## Economy

**Wirral Growth Company:** a new joint-venture partnership which aims to drive economic growth and to re-energise areas and communities across Wirral, including Port Sunlight's neighbours, Bebington, Bromborough and New Ferry.

## 2,300 people

**Unilever Port Sunlight:** the Wirral's largest employer, providing work for around 2,300 people. The village is the centre for Unilever's Home Care and Personal Care research and development facility, including its global innovation and development centres for hair and laundry, its factory operations, its global IT hub and the new state-of-the-art Advanced Manufacturing Centre.



# PORT SUNLIGHT AS A COMMUNITY

There are almost 1,100 residential properties in Port Sunlight – a mixture of owner-occupiers and private and social landlords. PSVT is the largest private landlord in the village, owning and managing 292 residential properties. Through a mix of day-to-day repairs, a five-year cyclical maintenance programme and upgrading houses when tenancies are relinquished, PSVT ensures the highest standards for tenants and properties. Stock condition surveys determine long and short-term budget planning for investment in the housing stock and the public buildings held by PSVT.

Port Sunlight has a relatively stable community - for PSVT the turnover of tenancies is typically less than 10% per year - and there is a waiting list for properties. There are many older residents in the village resulting in increasing numbers of requests for access adaptations and comparatively few families with children. Those who do move into the village often have expectations of 21st-century living at odds with a heritage property in a conservation area. Regeneration plans for New Ferry may present PSVT with an opportunity to increase the diversity of its community through the development of new accommodation just outside the village.

PSVT recognises that a strong, active, well-informed and effective community of residents is essential to the success of the village as a place to live, work and visit. PSVT will build an equal and respectful partnership with Port Sunlight residents, recognising that all have a stake in the future of the village. This vision for community engagement provides a unique blueprint for communicating and working with residents. It aims to tackle issues such as social isolation, to expand the use of Bridge Cottage as a community space, and to give residents opportunities to volunteer, form their own groups and comment on PSVT's activities.



## 2,065 people

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Around 2,065 people live in the village.

## 52%

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52% of households contain a retired person and 62% someone who is in full or part-time employment.

## 38%

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38% of residents live alone, and 41% live with one other person.

## 8%

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8% of households contain a primary school-aged child, and 5% a secondary school child.

## About 38%

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About 38% of adult residents are aged 65 and over, and only 3% are under 25.

## 15 years

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On average, residents have lived in the village for 15 years and 23% for more than 26 years.

## 34%

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34% of residents have a member of the household whose activities are limited by a long-term health problem.

# PORT SUNLIGHT AS A VISITOR DESTINATION



Image courtesy of Lady Lever Art Gallery, photographer Pete Carr



Port Sunlight is a successful and popular tourist destination. Visitors to PSVT's Port Sunlight Museum are:

- **paying visitors**, equating to 30,000 visits per annum,
- **mainly domestic**, day trip visitors originating from elsewhere in the Liverpool City Region (43.3%)<sup>11</sup> and the North West (19%),<sup>12</sup>
- increasingly **from overseas** (8.5%)<sup>13</sup> with a growing proportion of cruise ship passengers,
- often part of **organised coach groups**,
- of an **older demographic** – 69.4% are aged 55 or older and 52.8% are retired,<sup>14</sup>
- visiting on **education trips** (about 3,000 visitors per annum),
- **less than 5% of museum visitors are families**, increasing to 10% during half term.

Lady Lever Art Gallery also welcomes around 200,000 visits per annum.

Wirral's Visitor Economy Strategy<sup>15</sup> reports that the borough is the fastest growing visitor destination in the Liverpool City Region, welcoming 8.8 million visitors in 2017. The plan considers Port Sunlight as an integral part of the drive to further grow the tourism sector and, like PSVT, seeks to make the best use of heritage, leisure and cultural assets to drive tourism, create jobs and increase visitor economy revenue, in Wirral's case to £450 million by 2020.

It's a similar message at Port Sunlight's city neighbours.

- **Liverpool City Region** – between 2009 and 2017, there was a 65.93% growth in the value of the visitor economy, which in 2017 was worth £4.529 billion GVA, supporting 53,547 jobs.<sup>16</sup> The city's cruise ship terminal is of growing importance to its international tourism market (the city is the fifth most popular in the UK for international visitors).<sup>17</sup>
- **Chester** – the Cheshire West and Chester visitor economy has also seen significant growth; it was worth £2.023bn in 2017, an increase of 4.4% on 2016. Part of England's Historic Cities consortium, Chester is looking to develop new international markets, with culture seen as a big opportunity for the city.<sup>18</sup>

Both cities have a big impact on Port Sunlight, providing employment, leisure and retail opportunities for residents. They also draw visitors to the area, presenting Port Sunlight with opportunities to capitalise on the 'staycation' market<sup>19</sup> and to attract more overnight, domestic and leisure visitors throughout the week.



Image courtesy of Marketing Liverpool

'Wirral's visitor economy is expected to reach £450m by 2020.'

‘Often described by visitors as a ‘hidden gem’, Port Sunlight will be transformed over the coming years into a major visitor destination.’







Often described by visitors as a 'hidden gem', Port Sunlight will be transformed over the coming years into a major visitor destination. PSVT will increase Port Sunlight's profile locally, nationally and internationally, and drive footfall and visitor spend. This ambition underpins PSVT's new vision, mission and all of its strategic priorities. However, these changes are substantial, and to achieve them PSVT recognises that it must work differently and change in the following ways:

- The village must present a high-quality, joined-up offer to visitors. PSVT will establish formal partnerships with other attractions in and outside the village.
- Develop a sustainable and sympathetic transport infrastructure.
- Tell the complete, fascinating story of Port Sunlight – Lever's legacy should be made accessible to engage diverse audiences.
- PSVT must embrace and appropriately use digital media. It is increasingly important, especially to younger audiences.
- PSVT will develop an ambitious cultural events programme, attracting new and repeat visitors and appealing to and involving residents.
- Offer new, value-for-money retail and catering opportunities featuring locally-sourced products.
- Develop an overarching destination marketing strategy which describes the village's customer proposition, how it should be delivered and specific targets. It will include a unified destination consumer brand and be underpinned by a customer relationship management system.
- PSVT must connect with other industrial worker villages, both nationally and internationally, to raise our collective profile.

## SECTION 6

# STRENGTHS, CHALLENGES & RISKS

### STRENGTHS

- Unique heritage of international significance including Lady Lever Art Gallery and a reputable museum.
- A living community which is a desirable, safe and accessible place to live.
- Appeal to daytrip catchment, coach market and short break visitors.
- Income from PSVT's private housing stock.
- 10-year Conservation Management Plan.
- Presence and continued support of Unilever.

### OPPORTUNITIES

- Unilever's continued local investment.
- Liverpool's expanding cruise ship market.
- Growing local visitor economy – increased visitor spend in the Liverpool City Region and a growing interest in history, heritage and culture.
- New Ferry regeneration plans and the Wirral investment strategy.
- Strategic partnerships.
- Fundraising and new development potential in the village.

### WEAKNESSES

- Under-developed heritage interpretation and a small collection limiting PSVT's ability to tell the village's story.
- Limited retail and catering opportunities and poor car parking for visitors.
- Current public and community building usage not aligned to new vision.
- Lack of appeal to families and young people.
- Limited PSVT resources.
- Fragmented ownership of the village creates a major challenge to deliver a cohesive strategic plan and marketing.

### THREATS

- Stakeholders' priorities and resources not aligned to PSVT's strategy.
- An ongoing erosion of heritage, compounded by a shortage of local tradespeople with heritage skills and increasing cost of maintenance and conservation.
- Potential impact of visitor and commercial activity.
- Pressure to adapt residential properties to 21st-century living.
- Increasing competition from other attractions.
- Shortage of hotel beds for visitors in Wirral.
- Ageing demographic.

## PSVT RISKS

- Failure to ensure excellence in governance.
- Failure to stem the erosion or loss of heritage.
- Failure to maximise PSVT's financial potential, leading to lack of capacity to deliver the long-term vision.
- Failure to develop the visitor destination.
- Failure to manage the impact of the visitor destination.
- Failure to exist as a sustainable residential community.
- Failure to comply with statutory/regulatory requirements.
- Failure to maintain a motivated, engaged and committed workforce.
- Failure to have a robust business continuity strategy.

PSVT will continue to develop a strong system of internal controls, designed to manage rather than eliminate risk, to prevent and/or detect fraud and to give reasonable, but not absolute, assurance against material misstatements or loss.

## SECTION 7

# MAKING DIFFICULT DECISIONS

PSVT is faced with difficult strategic choices, many concerning the tensions between heritage, modernity and commercialisation. Others have a more social aspect, including PSVT's relationship with residents and their role in the village. However, PSVT views these challenges as opportunities for creative thinking and positive change.

### ORGANISATIONAL RESILIENCE

- How to enable residents and the local community to take a more active and proactive role in all aspects of village life.
- Whether to increase PSVT's tenanted stock through acquisition and/or new development, opt for stock reduction or focus on managing the existing portfolio. PSVT must develop criteria to make decisions on capital projects, e.g. new builds, garages, refurbishment of properties and estate works. Should decisions be based purely on return on investment, or are there other considerations?

### TOURISM

- How to balance demands for resources to fulfil the village's tourism potential with those required to conserve the heritage.
- How to manage any negative impact of visitor and commercial activity on the community and heritage.

### HERITAGE

- How to increase access to Port Sunlight's story when PSVT's collection and stake in the story is small but visitors' expectations are high.
- Whether to apply for World Heritage site inscription. This could be a real boon for the village but will the benefits outweigh the costs?
- How to respond to the need for green technologies to increase performance and reduce costs while ensuring the character of the Conservation Area is not adversely affected.
- How to respond to the ageing demographic in Port Sunlight. More older people are living alone, many requiring aids and adaptations. Conversely, how can the village appeal to families?

### ESTATE MANAGEMENT

- PSVT needs to be clear on its role in supporting neighbouring communities whose future prosperity will impact on Port Sunlight.
- How to ensure PSVT's properties are well-maintained and refurbished.
- How to respond to a rapidly-changing public-funding environment.
- How to ensure other village attractions, community organisations and commercial businesses contribute to PSVT's ambitious new vision and strategic priorities for Port Sunlight.



SECTION 8

# A NEW DIRECTION

PSVT has recently reviewed its mission statement, informed by an in-depth consultation process. This has enabled PSVT to articulate a new vision and values fit for the 21st century:

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Our vision:

“Port Sunlight, an inspiring place to live, work and visit”

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Our mission:

We are guardians of a unique and beautiful village, working with its community to ensure a great quality of life for residents and to celebrate William Lever’s amazing legacy through cultural and learning experiences for all.

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Our values:

## What we believe in

- **Integrity:**  
*You can trust us to do what we say*
- **Respect:**  
*We value diversity and treat everyone fairly*
- **Knowledge:**  
*We are always learning and improving*
- **Passion:**  
*We really care about both the past and future of Port Sunlight*
- **Creativity:**  
*We are problem-solvers and openly share our ideas through partnership working*
- **Participation:**  
*We put the community at the heart of everything we do*





# PSVT AIMS, OBJECTIVES AND TARGETS

## **STRATEGIC AIM 1:**

**Conserve and promote Port Sunlight's unique heritage in a sustainable way**

### **Supporting objectives:**

- 1.1** Harness Port Sunlight's heritage as a learning resource
- 1.2** Establish Port Sunlight as a heritage site of international significance and a centre of conservation excellence
- 1.3** Develop the museum's collection and village archive to support PSVT's work
- 1.4** Champion PSVT's heritage, environmental and access policies to arrest erosion of the site

### **How we will measure success:**

- We will reduce the number of village properties at risk
- We will achieve a Gold Standard in the Green Tourism Business Scheme
- We will increase the number of young people engaging with Port Sunlight's heritage

## **STRATEGIC AIM 2:**

**Be a financially-strong and well-managed, independent charity**

### **Supporting objectives:**

- 2.1** Develop a robust approach to long-term financial planning
- 2.2** Ensure PSVT's approach to governance reflects sector best practice
- 2.3** Develop a comprehensive, business-wide approach to achieving value for money
- 2.4** Develop a strategic approach to fundraising
- 2.5** Identify and monitor key risks to the business and develop appropriate strategies to ensure sustainability
- 2.6** Develop a strategic approach to asset management and investment for PSVT's buildings, public art and amenity landscape

### **How we will measure success:**

- We will ensure a healthy financial model that includes a diverse, sustainable portfolio of income sources, safeguarding the future of both PSVT and the village



### STRATEGIC AIM 3:

## Deliver high-quality services across the estate

### Supporting objectives:

- 3.1 Be an excellent landlord
- 3.2 Ensure effective, responsive repairs and planned maintenance services, and a re-investment programme based on comprehensive, accurate data
- 3.3 Ensure the sustainability of the community and the provision of appropriate facilities and services
- 3.4 Fully comply with all regulatory and health & safety standards
- 3.5 Provide opportunities for meaningful resident engagement to shape future services

### How we will measure success:

- We will ensure our tenants are happy and safe in their homes
- We will ensure top quartile performance levels across key areas of our estate-based services
- We will achieve external accreditation to demonstrate PSVT's commitment to excellent customer service

### STRATEGIC AIM 4:

## Realise the potential of Port Sunlight as a leading visitor attraction

### Supporting objectives:

- 4.1 Promote Port Sunlight as a 'destination' for domestic and international markets
- 4.2 Tell the complete story of Port Sunlight's significance and relevance to the modern world
- 4.3 Generate new sources of income from the visitor experience
- 4.4 Develop Port Sunlight's infrastructure to mitigate visitor impact on the community and heritage
- 4.5 Support Port Sunlight residents to play a key role in the visitor destination

### How we will measure success:

- We will increase the number of people visiting the village
- We will launch a world-class museum working with key stakeholders
- We will achieve Coach Friendly status as a visitor destination



### **STRATEGIC AIM 5:**

## **Be a brilliant place to work**

### **Supporting objectives:**

- 5.1** Develop a People Management Strategy which supports the achievement of PSVT's strategic goals
- 5.2** Ensure PSVT's workforce has a shared passion and understanding of the charity's vision and how every individual contributes to its success
- 5.3** Embed PSVT's values across the workforce to ensure a consistent approach to service delivery
- 5.4** Ensure PSVT's workforce is highly-skilled, well-supported and effectively managed, enabling a high-performance culture
- 5.5** Develop first-class internal communications

### **How we will measure success:**

- We will ensure staff and volunteer satisfaction levels are top quartile
- We will achieve Investors in People Platinum Accreditation



SECTION 9

# DELIVERING A PLAN FOR THE FUTURE





## How will these plans be funded?

PSVT's activities are primarily funded by the rental income generated by the 292 residential properties, 16 public buildings and 314 garages in its ownership. A planned refurbishment programme, which improves the condition of properties as the secure tenancies end, ensures that properties are uplifted to market rent levels, enabling PSVT to increase its rental income year-on-year.

In addition to property rentals, PSVT generates income from around 30,000 paying visitors through admission charges for the Arts Council-Accredited Port Sunlight Museum and associated activities including workshops, guided tours and events. Trading activities, including the gift shop and tea room, also contribute to the overall income.

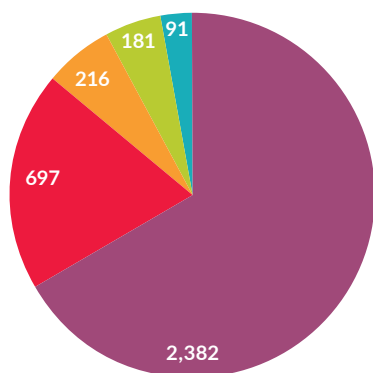
Currently, PSVT receives an annual grant from Unilever which will continue until 2022/23. This financial support will provide PSVT with an opportunity to deliver a number of major capital projects and key business priorities.

## Income and expenditure

The current breakdown of PSVT's income and expenditure is shown here:

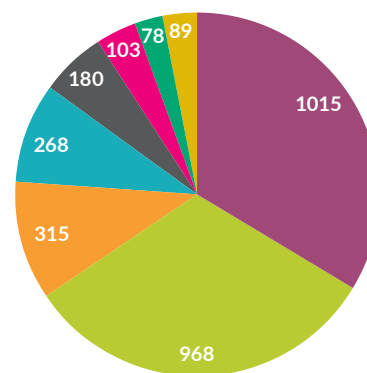
This includes regular capital expenditure, but excludes one-off grant funding and associated expenditure. PSVT continues to work closely with funders to secure appropriate funding to support delivery of its strategic objectives.

### Income (£'000)



Property income	£2,382
Unilever covenant	£697
Trading income	£216
Museum services	£181
Donations and other income	£91
<b>Total:</b>	<b>£3,567</b>

### Expenditure (£'000)



Staff and volunteer costs	£1,015
Property and estate management	£968
Property refurbishment & capex	£315
Admin and support costs	£268
Insurance and utilities	£180
Trading costs	£103
Museum services, marketing & events	£78
Financing	£89
<b>Total:</b>	<b>£3,016</b>

PSVT currently generates an annual revenue surplus making it a self-sustaining, independent charity. This creates flexibility about future priorities, and so PSVT aims to diversify and maximise all available income streams.

# FINANCIAL PLANNING

**Over the five-year life of this strategy, PSVT will work hard to increase its available cash reserves by:**

- exploring initiatives which will enable it to broaden its portfolio,
- developing a site master plan for Port Sunlight, ensuring PSVT maximises the financial return from its assets,
- implementing a value for money strategy, improving cost control,
- developing a fundraising strategy, enabling PSVT to work effectively with funders and partners,
- generating additional income from new sources, e.g. legacies,
- delivering the community engagement plan, marketing & communications strategy and interpretive master plan which will allow the charity to enhance its offer and so generate more income,
- making use of its substantial asset base against which to secure borrowing when required,
- addressing both internal and external challenges which will bring financial impacts, including an extensive programme of investment for all housing stock, modernisation of the business and investment in its IT infrastructure, and
- maintaining a rolling 30-year financial model, stress tested to help understand the long-term impact of legislative and economic changes. The model shown projects the impact of continuing the existing level and scope of activity up to 2023/24, resulting in a large cash surplus. However, future capital projects and other strategic objectives will have a significant impact on the model.



	2019/20 £'000	2020/21 £'000	2021/22 £'000	2022/23 £'000	2023/24 £'000
<b>Capital</b>					
Capital Expenditure including Refurbishments	315	321	327	332	338
<b>Financing</b>					
Loan repayments	(89)	(93)	(97)	(101)	(105)
<b>Revenue Receipts</b>					
Unilever Covenant	697	714	732	750	-
Residential Rent	2,134	2,184	2,235	2,286	2,339
Other Rents (garages, public buildings, etc)	248	323	323	323	323
Admissions, Tours, Gift Shop, Tea Room	396	396	396	396	396
Other Income	91	91	91	91	91
<b>Total Revenue Receipts</b>	<b>3,566</b>	<b>3,708</b>	<b>3,777</b>	<b>3,846</b>	<b>3,149</b>
<b>Revenue Payments</b>					
Property and Estate Management	968	1,250	1,160	1,105	1,144
Staff costs	1,015	1,033	1,052	1,070	1,090
Visitor Destination (Museum, Tea Room)	181	185	188	192	195
Administration costs	410	410	420	430	440
Loan Interest	38	37	35	34	33
<b>Total Revenue Payments</b>	<b>2,612</b>	<b>2,915</b>	<b>2,855</b>	<b>2,831</b>	<b>2,902</b>
Net Cash Inflow (Outflow) 'Business as Usual'	550	379	498	582	(196)
<b>Cash Balance carried forward</b>	<b>3,032</b>	<b>3,411</b>	<b>3,909</b>	<b>4,491</b>	<b>4,295</b>

# PSVT PEOPLE

PSVT is cognisant of the link between job satisfaction and productivity and aims to be 'a brilliant place to work'.

PSVT is strongly committed to diversity and equality, seeking to ensure representation from every sector of our stakeholder group, to provide its people with opportunity for development and self-realisation, and to generally be considered an exemplary employer. All of this is enshrined in our People Management Strategy. Our Performance Management Framework is the cornerstone of this strategy, providing the Board and Leadership Team with robust, reliable and timely information to enable them to make informed decisions.

## GOVERNANCE

The PSVT Board is a group of highly-skilled, enthusiastic individuals who together have extensive experience and knowledge of the business requirements of the organisation. It is responsible for devising this strategy, and for scrutinising and evaluating the overall organisational performance. PSVT will ensure that the skillset of its Board meets the needs of the business, through regular 'skills audits' and personal development opportunities for members, as well as the recruitment of new members. Resident representation on the Board is essential, ensuring strong links and continuous dialogue with our local community.

## PSVT STAFF

**PSVT aims to be an employer of choice and a brilliant place to work. To this end it will:**

- strive to attract, retain and develop a quality and highly-motivated workforce,
- give its staff the structure and opportunity for personal and professional development,
- provide excellent leadership,
- celebrate great work whilst expecting staff to be accountable for their individual performance,

- reward staff with an attractive remuneration package and all the advantages of working for a diverse, vibrant and forward-thinking organisation,
- celebrate diversity and ensure equality of opportunity for all, and
- encourage staff to maintain their sense of humour and to have fun!

All PSVT asks in return is that every member of staff will be highly engaged and take pride in their work, fully understanding their role and how it contributes to the performance of the whole organisation. The comprehensive People Management Strategy articulates how PSVT staff contribute to its vision and its expectations of them and drives improvement in all of its employment and management activities.

## VOLUNTEERS

**They give their valuable time to perform a variety of important tasks including:**

- providing guided tours of the village,
- researching PSVT's collections,
- supporting public events,
- working with the landscape team to maintain Port Sunlight's parks and gardens, and
- stewarding in the museum, Edwardian Worker's Cottage and community hub.


PSVT recognises that an inclusive and community-based volunteering programme is vital to a sustainable and successful future for the charity and the village as a whole. To support this approach, PSVT has undertaken a significant review of its volunteer management programmes with a view to implementing a new volunteer strategy. Making good use of volunteers' skills, inspiring people to take the initiative when it comes to tackling community issues and contributing to the visitor experience are central to PSVT's mission.



'PSVT recognises that an inclusive and community-based volunteering programme is vital to a sustainable and successful future for the charity and the village as a whole.'

SECTION 10

# CONCLUSION



Port Sunlight Village Trust is confident that this strategic plan sets a course for a successful, sustainable future for the village. A combination of robust financial planning, diverse income streams, improvements in the quality and scope of the visitor proposition, sustainable conservation, detailed monitoring practices, superior employment conditions, and working with and for residents should see the company through the many challenges it will undoubtedly face. The opportunities presented by local regeneration plans, the growing local tourist market and the skills, enthusiasm and energy of PSVT's people are also huge pluses.

**The strategy might be best summed up by Lever himself from his 1917 speech:**

“...we cannot see far enough what are the cross currents and under currents that we have to face, but we can organise our time and our work so that all shall have equal opportunities and none be overworked...”<sup>20</sup>



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