

COMMISSIONING BRIEF:

Supporting the development of PSVT's new 3-year Strategic Plan, 2025-2028



1. Introduction

Port Sunlight Village Trust (PSVT) wishes to appoint an experienced consultant to support the development of a new 3-year Strategic Plan for the organisation.

Following a review of our most recent strategic plan, we need external expertise to help us:

- Set ambitious but realistic strategic aims.
- Identify objectives to achieve our strategic aims and ensure they are measurable.
- Produce success criteria to deliver the objectives.
- Put a plan in place to monitor and report on our progress.

We wish to launch the Strategic Plan in Spring 2025, and to present the draft strategic aims, objectives, and success criteria to our Board on 13th December 2024. The plan for monitoring our progress will need to be completed by mid-February 2025.

2. About Port Sunlight

Port Sunlight was founded in 1888 by the industrialist William Lever. He wanted to provide the employees of his new Lever Brothers soap works and their families with decent and affordable housing and a wide range of facilities, services, policies, and incentives to ensure their well-being and 'betterment'.

Port Sunlight is not the first example of an industrial worker village, but it is one of the finest surviving examples in the world. It was an immediate precursor to and a model for the Garden City movement and influenced the design of planned worker settlements, garden villages and garden suburbs around the world from the turn of the twentieth century to the present day.

Visitors and tourism are not new to Port Sunlight. It has been part of Port Sunlight's purpose since 1891. It was designed and maintained to be a visitor attraction. That is why Lever Brothers developed it to look the way it looks and why Unilever invested in it throughout the twentieth century. Port Sunlight is for in-person visitors.

Today Port Sunlight is a Conservation Area and most residential properties, public buildings and monuments are Grade II listed. The war memorial is Grade I listed. These provisions provide statutory protection to the village enforced by the local planning authority (LPA) Wirral Council. Furthermore, there are restrictive covenants in the title deeds of all residential property. Two sections of the landscape – The Dell, and The Diamond and The Causeway - are included in Historic England's register of Parks and Gardens of Special Historic Interest. Ten of Port Sunlight's green spaces are also designated for protection as Urban Greenspace by Wirral Council.

The village is home to approximately 2,000 residents, a mixture of owner-occupiers and private tenants, living in 1,059 residential properties. Prior to the Covid-19 global pandemic, Port Sunlight attracted in the region of 300,000 domestic and international visitors each year. There are a variety of community organisations and businesses operating in Port Sunlight today, from the village school and Grade II* listed church to two pubs, a hotel, conference and events space, a garden centre, and a theatre.

There are other important stakeholders in the village too, namely:

- Wirral Council (the LPA) who as well as planning and enforcement provide statutory services for highways, waste management and transport.
- National Museums Liverpool is responsible for the Lady Lever Art Gallery. Founded by William Lever, the gallery has one of the UK's finest collections of fine and decorative art.
- Unilever whose historic home in the UK is Port Sunlight; Lever Brothers became Unilever in 1929 following a merger with the Margarine Union. Today, Port Sunlight is an advanced manufacturing hub for Unilever and a centre for the company's Home Care and Beauty & Personal Care Research & Development.



3. About Port Sunlight Village Trust (PSVT)

PSVT is an independent charity founded in 1999 by Unilever Plc. Our vision is to make “Port Sunlight, an inspiring place to live, work and visit.” 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.”

PSVT is directly responsible for:

- A diverse group of monuments (listed and unlisted).
- A permanent museum collection and village archive.
- All landscapes within the Conservation Area (except the back gardens of houses).
- 292 Grade II-listed houses, 323 garages and 22 non-residential/community buildings.
- *Port Sunlight Museum & Gift Shop, including the Edwardian Worker’s Cottage and a regular programme of public and community events, and walking and coach tours for general visitors and groups.
- Formal and informal learning programmes, which include the STEM gallery SoapWorks.

It also works with partners and stakeholders to:

- Tackle social issues and promote community cohesion.
- Manage the visitor destination and raise its profile.
- Provide conservation advice to homeowners.

PSVT employs approximately 50 members of staff and works with organisational and community volunteers to discharge its charitable objectives. We are governed by a voluntary Board of Trustees with expertise in housing, surveying, finance, conservation, landscape, planning, museums, and heritage.

4. The need for the commission

Our most recent Strategic Plan (2019-2024) concluded in March 2024. We have committed to developing a new 3-year plan for PSVT in 2024/25 and to launching it in Spring 2025 in time for the new financial year.

A review of the development and implementation of the 2019-2024 Strategic Plan has been undertaken and we are using the findings to inform our approach to the new plan. We are also in the process of sharing our achievements and lessons learnt with key stakeholders.

Two pieces of work have been commissioned to address gaps in our intelligence: Epona are undertaking a programme of audience research with current and non-visitors to Port

Sunlight, including some comparator analysis; and Paul Kelly and Catherine Simmons are engaging Port Sunlight residents and PSVT residential tenants through the Have Your Say 2024 project.



Internally, a review of PSVT's operating environment is underway, along with the organisation's key strategic risks.

Further stakeholder consultation, internal and external, will take place in October and early November. Together we will review and revise PSVT's vision, mission and organisational values.

We now wish to bring in external support to help us develop ambitious but realistic strategic aims and objectives, identify success criteria for the objectives, and create a plan to monitor and report on our progress. This commission is an outcome of the review of PSVT's 2019-2024 Strategic Plan.

An outline 3-year Strategic Plan will be presented to PSVT's Board in December, after which we will work with a copywriter to develop the final version of the plan for launch in Spring 2025.

5. Scope of Works

Below is a summary of the scope of works for this commission.

- A. Familiarisation with PSVT, its role and work.
- B. A deep dive into the work currently being undertaken to develop PSVT's new 3-year Strategic Plan, including the review of the 2019-2024 Strategic Plan, audience research, community engagement, internal and external stakeholder consultation, and review of PSVT's operating environment and key strategic risks.
- C. Work with PSVT's Leadership Team to develop new aims, objectives, and success criteria.
- D. Produce a plan for us to monitor and report on our progress that is suitable for the size and nature of the organisation.
- E. Set out your recommendations in a final report.
- F. Ensure the project always complies with the Data Protection Act 2018 and UK GDPR and adheres to PSVT policies and procedures in this regard.

6. Skills and Experience

We believe that to deliver this piece of work successfully you will have experience of writing strategic plans, identifying success measures, and developing monitoring frameworks. PSVT has a broad business model. We anticipate that this commission might be of interest to people with experience of working in housing, museums and heritage, or community engagement.

Evidence of appropriate insurance, including Public Liability Insurance, is also essential.

7. Equity, Diversity, and Inclusion

PSVT is actively working to be a diverse and inclusive organisation. As part of PSVT's commissioning practice, we welcome submissions from people who are from the Global Ethnic Majority, Disabled, Neurodiverse, D/deaf, LGBTQ+, and/or from working-class backgrounds.

8. Budget

A budget of up to £5,000 + VAT is available for this commission.

The total cost of the works presented to PSVT as part of the response to the brief should include all costs of delivery. PSVT can support some costs, e.g. venues to host meetings.



9. Reporting relationships

You will report to Katherine Lynch, Director of Projects at Port Sunlight Village Trust. The Project Team will include all members of the PSVT Leadership Team:

- Paul Harris, CEO.
- Mike Ward, Chief Commercial Officer & Deputy CEO.
- Jean Milton, Director of Heritage.
- Lin Whalley, Director of Operations.
- Rachel Tudor, Director of Corporate Services.

10. Application method

You are invited to submit a short proposal that must demonstrate the following:

- Your proposed approach and schedule to deliver the scope of work described above, highlighting any opportunities and anticipated issues. (45%)
- Examples of previous relevant projects, the names of two referees who have experience of working with you on similar projects and CVs for you (and your team, if applicable). (35%)
- Breakdown of costs by scope of work, including number of days and day rate for you (and individual members of your team, if applicable). (20%)

Proposals will be evaluated on a quality (80%) and cost (20%) basis. The evaluation weighting is provided in brackets above.

Your proposal should be emailed to Katherine Lynch, Director of Projects k.lynch@portsunlightvillage.com

11. Timescales

The deadline for proposals is 10.00am on Wednesday 2nd October. Ideally an appointment will be made during w/c 30th September based on submissions received. However, on-line interviews may be required.

We are aiming to launch the new plan in Spring 2025. We would like to present drafts aims, objectives and success criteria to our Board on 13th December. The plan for monitoring our progress will need to be completed by mid-February 2025. The final report will be shared with PSVT's Board at their March 2025 meeting.

12. Further Information

For an informal conversation please contact Katherine Lynch, Director of Projects k.lynch@portsunlightvillage.com

PSVT's most recent 5-year strategic plan and 10-year Conservation Management Plan (CMP) are available to download from PSVT's website www.portsunlightvillage.com

All other relevant documents and reports will be shared upon appointment.