



## Port Sunlight Village Trust

### Brief for project management and cost planning services

#### **Introduction**

Port Sunlight Village Trust (PSVT) is seeking project management and cost planning services to support a Development phase application to the National Lottery Heritage Fund (Heritage Fund) for our project: *The Lyceum at Port Sunlight– adaptive re-use of a heritage building* (working title).

After a successful Expression of Interest to the Heritage Fund, we are now ready to progress to the next stage of our project. The Grade II Lyceum (1896) is one of 900 listed buildings in Port Sunlight, and the adjacent The Dell part of a Grade II listed park and garden.

The Lyceum, originally built as a school and used as a place of worship until the village church was built, is now used partly as office accommodation, a social club, and houses the *Soapworks* exhibition. As part of our ambitions to maximise the use of PSVT's built assets, we want to create a space in the Lyceum for a much-improved museum and learning space that will increase access to our collections, introduce visitors to the history of Port Sunlight, and place a community-led exhibition programme at its core. This will replace the existing Port Sunlight Museum. In addition, we will create visitor spaces, and makerspace areas to respond to the demand from local creatives and makers.

We are looking for a suitably qualified individual or company with strong experience and understanding of Heritage Fund projects like ours, and who will work closely with the client team and wider consultant team. We aim to submit our Development phase application at the end of July 2025, in advance of the deadline in early August 2025.

#### **About Port Sunlight**

Port Sunlight, located on the Wirral between Liverpool and Chester, 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. Today Port Sunlight is a Conservation Area and most residential properties, public buildings and monuments are Grade II listed.

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.

### **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 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.

### **Scope of services**

PSVT has completed a significant amount of work to support the Lyceum project, including a costed options appraisal design report and a condition survey. We have also completed a range of other work that will support the Development phase application which we will share with the successful applicant. We believe this places us in a good position to be able to submit a Heritage Fund application by August 2025. However, to achieve this we need support for project management and cost planning from an experienced project manager.

Scope of services:

To work closely with the client team, reporting to the Project Lead, to complete the work required for a Heritage Fund Development phase application. Specifically, to:

- Review all work completed to date and advise on any gaps and further work required.
- Develop briefs for and lead the procurement of external specialist consultants to review and update work completed to date as required.
- Support the client team in preparing and issuing client-direct contracts for this work.
- Manage the development of the work above to fulfil requirements of a Heritage Fund Development phase application.
- Manage and monitor the budget assigned to this project phase.
- Set up a robust client review process at key project stages through the life of the project, including this phase.
- Work with other external consultants as required to complete the required work.
- Provide scrutiny for all the application documentation.
- Provide general advice to the client team through the preparation of the Development phase application.
- Advise on and develop detailed Development and Delivery phase timetables.
- Conduct a project risk workshop and develop a risk register for the Development, Delivery and post project phases.

- Advise on project governance and structure and produce a project structure document for the Development and Delivery phases.
- Develop a Project Management Plan for the Development and Delivery phases including a procurement strategy that fulfils both Heritage Fund and PSVT requirements.
- Produce monthly reports for the Client team and attend monthly online project meetings
- Attend site as required.
- Report to the PSVT as required.
- Establish and manage monthly project meetings as required with the client team.
- Work with the Architect team to review capital costs and produce a full project cost plan, including for any surveys required for the project Development phase.
- Work with the wider consultant team to produce costings for professional services for the project Development and Delivery phases.
- Lead cost review exercises as required.
- Develop a full cost breakdown and cashflow for the Development and Delivery phases.
- Ensure the final costings are within the proposed budget.
- Develop job descriptions and briefs for work for the project Development phase including tender documentation.

**Contract dates:** March to August 2025

**Fee for project management services:** £18,000 - £25,000 ex VAT.

**How to apply:**

**The deadline for responses is 24 March 2025 at 12 noon**

Clarification interviews, if held, will be w/c 24 March 2025.

We expect to award the contract w/c 24 March 2025.

Please submit a response (maximum 6 sides of A4 in addition to CVs) to include:

- Proposed methodology, programme and timescales including number of days allocated to each task.
- Details of comparable experience on heritage projects, especially for projects supported by the Heritage Fund.
- A fixed-price quote illustrated through a costed resource schedule, including the daily/hourly rate for each consultant and any expenses, and number of days for each consultant, excluding VAT.
- Details of the consultant team and individual consultant experience. CVs submitted should clearly demonstrate relevant experience.
- Details of the proposed role of each consultant.
- Confirmation that the work can be completed within the brief and to the agreed timescale.
- Insurance details – Professional Indemnity £2 million and Public Liability £5 million.

Please send your response by **24 March 2025 12 noon** to: [j.milton@portsunlightvillage.com](mailto:j.milton@portsunlightvillage.com)