



STRATEGIC PLAN 2025-28



Port Sunlight
VILLAGE TRUST



For all Port Sunlight's Stakeholders



FOREWORD FROM CHAIR AND CEO

Back in 2019, Port Sunlight Village Trust (PSVT) launched its first Strategic Plan. It presented a fresh, bold vision for our village, and was met with an enthusiastic response from village residents, our PSVT team and other stakeholders alike.

Since then, real progress has been made.

- ◆ We are working alongside village residents and PSVT tenants to embed a new resident engagement strategy and make them feel part of our work and decision-making.
- ◆ Our visitor offer and learning programmes have been boosted by the launch of SoapWorks, and we are targeting more diverse audiences through exhibitions at Bridge Cottage and new events.
- ◆ Our residential properties are benefitting from a programme to improve their thermal efficiency and a focussed programme of planned and cyclical maintenance.
- ◆ A long-term approach to maintaining and caring for our monuments has been established, and we are well on our way to identifying and implementing a solution for the Boating Pond.
- ◆ We have developed a robust approach to long-term financial planning, put a fundraising strategy into action, and established a new directorate devoted to income generation and communicating with our stakeholders.
- ◆ In our drive to become brilliant employers we have developed a People Strategy and increased our focus on wellbeing.
- ◆ Together we have been through a global pandemic, which whilst catastrophic, also strengthened community spirit, increased the use and value of Port Sunlight's green spaces, and modernised PSVT's business operations.



We hope that all our stakeholders – visitors, residents, tenants, business partners, funders and the PSVT team - are proud to have contributed to this success in often challenging situations.

We now present to you our 2025-28 Strategic Plan. It builds on these, and other successes from the earlier strategy, while recognising that so much about our operating environment has changed. The plan seeks to present an exciting, forward-thinking, yet pragmatic vision for Port Sunlight, laying foundations for our future aspirations while at the same time challenging us to make real strides in the coming three years.

Part of PSVT's role is to preserve our unique village; to conserve the historic buildings, spaces and stories that make us special. However, this must be balanced by the recognition that the world around us is changing constantly, and we must change with it. Our village and its buildings and landscapes must adapt if they are to provide a modern yet authentic place to live, work and visit for people of all ages and abilities. The impacts of the climate crisis and other global challenges are being felt in every small corner of the world, and we know we must mitigate against their effects. Our approach to income generation must evolve if we are to fund the maintenance, conservation, developments, and initiatives required to achieve our ambitions. And, as an organisation that engages with a broad range of stakeholders, and an employer of people, we must be flexible, adaptable, and inclusive.



FOREWORD FROM CHAIR AND CEO (CONTINUED)

This document summarises how we will work to meet these and other challenges, harnessing our shared enthusiasm, creativity, and ambition. PSVT's plans for our village in the coming three years focus on five strategic aims:

1 COMMUNITY

Exploring how we can create meaningful opportunities for our community to contribute to our village's future.

2 PARTNERSHIP

Working with residents, commercial partners and other stakeholders, nurturing existing relationships and developing new ones.

3 RESILIENCE

Increasing our financial and organisational resilience, diversifying, growing our income streams, and working towards our full potential.

4 CONSERVATION

Protecting and conserving our historic buildings, monuments, and landscapes, improving infrastructure and environmental sustainability.

5 CULTURE

Bringing Port Sunlight's legacy to life, increasing heritage skills, and presenting a diverse, vibrant, captivating, and sustainable offer.

What will these changes look like?

By the end of this three-year period, we intend that:

- ◆ The Stables and other under-used buildings will have been brought back into use for the benefit of all.
- ◆ The Lyceum Project will be well down the path to transforming one of the village's iconic buildings into a new space with a museum, community facility and learning area, creating an inspiring resident facility and visitor attraction.
- ◆ Our community's voices will be heard in our programming, planning and decision making. Residents will be happy with the changes they see around them.
- ◆ Behind the scenes, PSVT will be working more productively with strategic partners, resulting in positive change that you will see and feel in our village.
- ◆ Our finances will have benefitted from the introduction of new commercial income streams.
- ◆ For PSVT tenants, their homes will be warmer and more energy-efficient and our tenant services will offer better value for money.



- ◆ The Boating Pond will be filled and the Sea Piece fountain spouting water again to the delight of residents and visitors alike.

While PSVT's logo is on the front cover, we hope that this document encapsulates a shared vision for all of Port Sunlight's stakeholders. In recent months, we have heard from many of those stakeholders – indeed, you may have been part of this process. Thanks to our residents, tenants, visitors, businesses, funders, and other partners in our community who have spoken to us about their priorities, concerns and hopes for our village.

This document is an attempt to crystallise that progressive, confident vision, underpinned by an ambitious yet realistic roadmap. Throughout you will see references to ongoing work. That is because this is a 'living document' which we will update and refer to over the course of its lifetime, ensuring our course is true. We hope that you will wholeheartedly join us on that journey.



Andrew Bowden
Chair of the Board



Paul Harris
CEO



ABOUT THIS STRATEGIC PLAN

This document sets out Port Sunlight Village Trust's (PSVT) vision for the coming three years. In it we explore:

1

OUR PURPOSE

What are our aims and objectives for the next 3 years?

2

OUR CONTEXT

What are the policies, strategies, risks, people, organisations and other factors we need to consider?

3

OUR PLAN

What are our aims, objectives, and capital projects for the next three years? How will we achieve them, and how will we measure our success?

4

OUR FINANCE AND RESOURCES

How will we meet the cost of delivering the new plan, investment priorities and special projects as well as day-to-day operations, and resource it adequately?



Our new Strategic Plan is rooted in evidence and the insights we obtained from the following activities:

◆ Evaluation

We conducted an internal review of the development and delivery of our 2019-24 Strategic Plan, learning lessons which have helped shape our approach to developing this new iteration.

◆ Situational analysis

We also reviewed our current context and operating environment – the world around us – building on previous internal and commissioned work.

◆ Market research

Our visitors, non-visitors, and comparator locations – other historic sites, visitor attractions, and cultural organisations – were all analysed.

◆ Have Your Say 2024

More than 600 village households responded to our survey.

◆ Stakeholder consultation

Our tenants, village residents, local businesses, community groups, local councillors, strategic partners, funders and the PSVT team were all consulted.





STRATEGIC PLAN 2025-28



OUR PURPOSE

As well as considering the future of our village, we've explored the role of PSVT with key stakeholders. Who are we? What is our purpose? What do we want to be and how can we best serve the village in the coming years? We have distilled that thinking into this new mission, vision and value set.

OUR MISSION

PSVT is the charity that keeps Port Sunlight relevant, working with village residents and partners to tell stories, care for historic collections, buildings, and landscapes, and create an inviting place for people to live, work and visit.

OUR VISION FOR PORT SUNLIGHT

An environmentally conscious and socially vibrant place, where residents are happy and engaged, visitors are captivated, and everyone can learn from its stories.



OUR VALUES

We are respectful

- ◆ We value each other and what different people bring to Port Sunlight.
- ◆ We are inclusive, welcoming to all, and treat people fairly.
- ◆ We reflect the changing world in how we work and tell Port Sunlight's story.

We are collaborative

- ◆ We work with village residents and our partners to make Port Sunlight special.
- ◆ We believe effective communication is fundamental to our work.
- ◆ We find solutions through collective and creative problem solving.

We are progressive

- ◆ We are always looking for innovative ideas and new opportunities.
- ◆ We learn from the past to shape Port Sunlight's future.
- ◆ We support and encourage one another to learn, grow and act.

We are genuine

- ◆ We are proud to represent Port Sunlight and excited for the future.
- ◆ We are approachable, ready to engage, and willing to listen.
- ◆ We are honest with ourselves, and transparent with our residents and other stakeholders.



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OUR CONTEXT

About PSVT

We have been responsible for the preservation and promotion of the Port Sunlight Conservation Area since our founding by Unilever in 1999. An independent charitable trust, we care for all the village's parks, gardens, monuments and memorials, as well as most of the public buildings and nearly a third of the houses.

PSVT also runs Port Sunlight Museum (incorporating Bridge Cottage, the Worker's Cottage and SoapWorks) which celebrates the unique heritage of the village, including its development, architecture, people and landscapes. We present special exhibitions, events, learning programmes, and volunteering opportunities. These activities and facilities are all underpinned by a historical collection and archive.

PSVT now spends more than £3 million each year, on building maintenance, conservation projects, landscape maintenance, and lifelong learning programmes. These are funded through grants, charitable donations, and income from property rentals, museum admissions, and retail sales. Every penny raised through commercial activities is reinvested back into the village.

PSVT is managed by a board of trustees with expertise in housing, finance, conservation, museums, community engagement, research and project management. We employ a team of 50 dedicated and valued employees across all areas of the business, and benefit from the skills, experience and time of about 30 active volunteers who are mainly from our local community.

You will find more information about who we are and our responsibilities by visiting our website [portsunlightvillage.com](https://www.portsunlightvillage.com) and downloading the [Port Sunlight 10-year Conservation Management Plan 2018-2028](#).

To support us in our work, we have developed a range of robust strategies and plans which guide us, while reflecting the diversity and complexity of our business model and responsibilities. They include:

- ◆ **Income generation and fundraising**
How we raise revenue and secure capital funding to invest in the village.
- ◆ **Marketing and communications**
How we promote our village to visitors and businesses.
- ◆ **Conservation**
The reason we exist, to conserve and maintain our buildings, landscapes and monuments.
- ◆ **Interpretation**
Sharing the stories of our village with visitors, residents and education groups.
- ◆ **Collections**
How we look after and understand the objects in our care.
- ◆ **Public realm**
Maintaining and improving our parks and gardens, as well as the spaces and places between buildings.
- ◆ **Environmental sustainability**
Ensuring our village homes are fit for purpose, and indeed all areas of our operations are contributing positively towards combatting climate change.
- ◆ **Our people**
Being a brilliant place to work.
- ◆ **Resident engagement**
Being a brilliant place to live.

Given our location, Wirral Council, the Liverpool City Region Combined Authority, and Enterprise Cheshire and Warrington are all important stakeholders for us and their priorities have been taken into account in the development of this new plan.



STRATEGIC PLAN 2025-28



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OUR CONTEXT

Our Strengths, Challenges & Risks

Before embarking on a major new strategy it is important that we review our own performance and identify what PSVT is doing well, what needs some work, and what the future might hold for Port Sunlight. We have listened to feedback from PSVT's stakeholders (thanks if you contributed to this process) and come up with the following reflections:

Our strengths

Our visitors like Port Sunlight. This is an attractive place to visit with a good reputation. Our heritage and the stories we tell are truly unique - an 'uncommon' story - with a real history of social innovation. Port Sunlight speaks to visitors, with contemporary themes of environmental sustainability, post-colonialism, and community holding great relevance for today's audiences.

Our residents are happy here. Port Sunlight has a settled, committed population contributing to a real sense of place. Our new resident engagement strategy really listens to the village. People want to move here.

PSVT is in a strong financial position thanks to good governance. Our workforce is committed and engaged and we have good relationships with our stakeholders.

What needs work

We need to be clearer about PSVT's purpose in the village. We can be more visible and transparent in our operations, less paternalistic in our approach, and better engaged with our residents.

There's a lot expected of PSVT but we have limited capacity to deliver. Port Sunlight is showing its age, and our assets, including the trees, landscape, and buildings, cost a lot to maintain, requiring specialist heritage and other skills which can be hard to procure.

As the country faces economic challenges, we need a strategy to work constructively with those who can help us achieve our aims, notably with Wirral Council which is responsible for many key activities in the village.

Opportunities

We recognise that with a bolder approach to communications, engagement, and stronger stakeholder relationships, we can tell more of the many fascinating stories of the village, moving beyond the focus on William Lever.

PSVT is at its best when the team is fostering community empowerment. We need to shift from 'doing' to 'facilitating' or 'enabling' in some areas.

There is real potential in our village. Our vacant and under-utilised commercial properties are attractive to creative businesses. Partnerships and funding around environmental sustainability, the circular economy, green technology, education and interpretation, and with academia are genuine opportunities. Also, our location between Liverpool and Chester can help us to benefit from the visitor economy.

Issues to address

Our village is changing, but not always for the better. As we develop our commercial and visitor offers, the shortage of parking, especially near to the station, is a concern for residents. Also, we need to ensure that planning law and covenant restrictions are being adhered to, including in relation to holiday rentals, to ensure that the village does not lose what makes it so special.

Climate change is impacting on both our own and privately-owned properties, and wider economic pressures are making repairs and maintenance difficult and expensive to procure for everyone.

We live in economically challenging times and our partners' budgets are stretched. We need to work together creatively to address challenges across the site.

Assessing risk

Like any responsible business, PSVT maintains a Strategic Business Risk Register - a comprehensive list of the risks we face, their triggers, potential impacts, existing controls, and actions we might take to mitigate their impacts with risk owners and target dates. This register is well managed and reviewed regularly by the board of trustees.

Our risk register has been reviewed and updated to reflect any new risks, which could impact our ability to deliver this new Strategic Plan.

Our stakeholders

This Strategic Plan was written by PSVT, but it is founded on the hopes, concerns and ambitions of all village stakeholders. Extensive consultation has helped to shape our plans for the next 3 years.



3 OUR PLAN

OUR STRATEGIC AIMS

Having consulted with our stakeholders, we have distilled what we heard into five key areas. Each aims to address current challenges while working towards longer-term ambitions which will ensure Port Sunlight Village and PSVT become environmentally, socially, physically and economically sustainable:

- 1 Community:** We will empower residents to contribute to village life. PSVT will create meaningful opportunities for all to input into our decision making and will always consider the impact of our activities on residents and all those with a shared interest in Port Sunlight.
- 2 Partnership:** Partnerships present opportunities for Port Sunlight. We will improve our partnership work with residents, commercial partners and our other stakeholders, nurturing existing relationships and developing effective new ones. We will adopt a greater focus on collaboration and co-creation.
- 3 Resilience:** We will increase our financial and organisational resilience, diversifying and growing our income streams, and working towards ensuring all our assets are used to their fullest potential.
- 4 Conservation:** We will protect and conserve our historic buildings, monuments and landscapes, enhancing the public realm, improving infrastructure, amenities and accessibility, and increasing environmental sustainability.
- 5 Culture:** We will strengthen our creative and cultural offer. This will involve developing our collections, bringing Port Sunlight's legacy to life, increasing heritage skills and knowledge, and presenting a more diverse, vibrant, captivating, and sustainable resident and visitor experience.

How we will achieve these aims is outlined in the rest of this document. Each stage will be monitored and evaluated, looking at:

- ◆ **Delivery:** have our planned activities and outputs been delivered? Have we met the proposed timescales, budgets and quality measures?
- ◆ **Impact:** to what extent have the hoped-for outcomes and impacts been achieved?

Over the next 3 years PSVT commits to regular communication with key stakeholders, sharing our progress and the impact of our work.





STRATEGIC PLAN 2025-28



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OUR PLAN

THREE-YEAR DELIVERY OBJECTIVES

Our objectives for 2025-28 are focused on meeting our five new strategic aims. In each case, those objectives are measurable and achievable.

1

We will prioritise partnerships with our key stakeholders, like Wirral Council, to ensure the sustainable management, maintenance and conservation of Port Sunlight's buildings, landscapes and public realm.

2

We will develop and implement a sustainable solution to Port Sunlight's garage sites and rear green spaces that elevates their use, improves amenities, and supports resident engagement and environmental sustainability.

3

We will ensure Port Sunlight's Boating Pond is sympathetically restored and protected for the long term. We will work with the village community so it might once again be enjoyed by residents, visitors and local businesses.

4

We will bring The Stables and other under-used buildings back into use. Not only will this provide unique accommodation for local businesses, but it will also safeguard the buildings' heritage, establish new sustainable income streams from our buildings, intellectual property, and landscape assets, and contribute to the visitor and local community offer.

5

We will ensure that all our residential properties receive extensive energy efficiency works to improve their performance and help reduce energy bills and our impact on the environment.

6

We will review and improve management, maintenance and repair services for our buildings and landscapes, ensuring an efficient service that improves the resident, PSVT tenant and visitor experience, and protects our shared heritage.

7

We will develop a new approach to fundraising, implementing a strategy that will allow us to deliver our strategic aims and objectives in a financially-sustainable way.

8

We will assess the impact of our resident engagement strategy, as we seek to work with our community to ensure a sustainable and effective partnership approach to village life.

9

We will work with partners and funders to diversify and strengthen the resident and visitor experience, using their insights and contributions to shape programme planning. New creative and cultural initiatives will be piloted, while we also test and finalise The Lyceum Project concept for commencement from 2028.

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All of this will be boosted by an effective, impactful brand identity that aligns with the needs and expectations of all key stakeholders to raise our profile and enhance our communications.



STRATEGIC PLAN 2025-28



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OUR PLAN

KEY CAPITAL PROJECTS

We have planned several major changes that will enhance our village environment, capitalise on our built heritage and provide both PSVT and the village with new commercial opportunities.

The Boating Pond

The Boating Pond is a beloved Port Sunlight landmark, set within The Diamond, a registered landscape. It provides an impressive welcome to visitors to the Lady Lever Art Gallery and Port Sunlight Museum. However, since 2021 the pond has been drained of water and its fountain switched off following a condition review which identified significant structural issues. The PSVT team has been working with a team of heritage specialists to identify and cost sustainable repair solutions to restore the Boating Pond. Over the next 15 months, PSVT will secure the Listed Building Consent required to progress the necessary repairs, and with the support of Historic England will work with a specialist team of consultants and engineers to restore the Boating Pond to its former glory.

The Stables

The former stables have lain largely empty since the closure of the 'company shop' after the pandemic. PSVT has commissioned architects to reimagine the building with the aim of bringing life and animation to this quiet corner of the village through new employment uses, whilst celebrating its history and architectural design. Subject to funding and planning consents, we expect work to commence in late 2025/26. While the proposals are being developed, we have identified several interim uses, including a monthly farmers' market.

The Lyceum Project

PSVT has long held aspirations to improve the visitor and resident experience in Port Sunlight. In 2024, the National Lottery Heritage Fund approved our Expression of Interest and invited us to develop a substantive funding application to transform one of the village's iconic buildings into a new space with a museum, community facility and learning area, creating an inspiring visitor attraction. Over the coming three years, we will develop a business case, test concepts with key stakeholders, secure the necessary funds, and finalise plans so that project delivery can begin in 2028.

Residential properties - environmental improvements

In January 2024, PSVT began an ambitious and important programme of work to improve the energy performance of our 292 residential properties. The scheme, which includes secondary glazing, replacement boilers, loft insulation and draught proofing, will be completed in 2027 at a cost of £1.5 million.





4 OUR FINANCE AND RESOURCES

FINANCIAL PLANNING

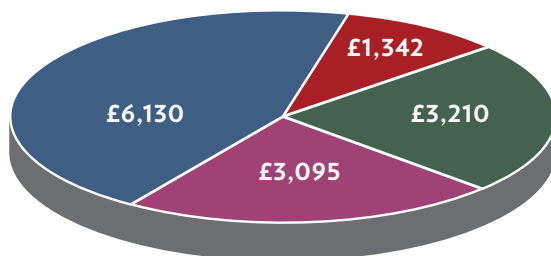
Over the next three years, PSVT focus will be on delivery and action. We will continue to be self-sustaining, generating surpluses from our normal, ongoing business activities.

We will be making good use of our reserves to deliver this Strategic Plan, while maintaining robust financial planning and procedures. These will include a 15-year financial model, stress-tested to understand the impact of our business decisions and any external changes (e.g. changes in legislation) as far as possible.

Our cash surpluses will be invested to maximise returns.

Our planned expenditure over the three-year life of the strategy, and how we intend to fund it, are shown below; these are grouped to reflect PSVT's key responsibilities. Total expenditure is anticipated to be £13.8m, and includes significant investment priorities; the additional cost will be funded from our accumulated reserves. PSVT has a policy in place to ensure that sufficient reserves are maintained for day-to-day business requirements.

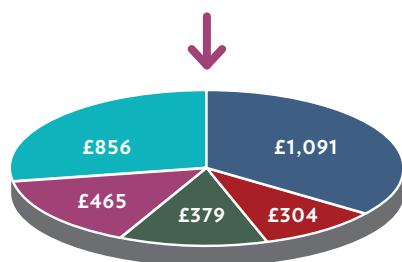
Anticipated Expenditure over the 3-Year Plan (£000)*



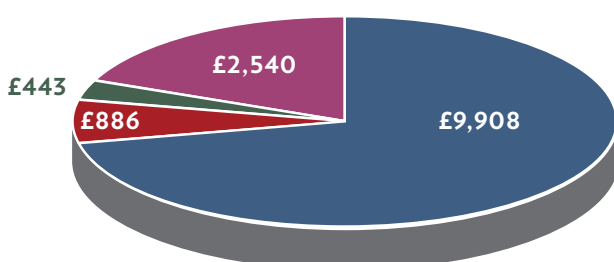
- ◆ Managing Assets
- ◆ Telling the Story
- ◆ Running the Business
- ◆ Investment Priorities

Investment Priorities

- ◆ Energy Efficiency Improvements
- ◆ Boating Pond
- ◆ Other Monuments
- ◆ Property Refurbishments
- ◆ Other Proposed Expenditure



How we Intend to Fund the 3-year Plan (£000)*



- ◆ Income from Managing Assets
- ◆ Income from Telling the Story
- ◆ Income from Running the Business
- ◆ Use of Reserves

* Information forecasted as at 1 April 2025



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OUR FINANCE AND RESOURCES

MANAGING ASSETS

As well as managing much of the village's residential and commercial property, PSVT is responsible for most of the public realm and monuments. In addition to our usual management and maintenance work, over the next three years we will also spend to:

Year 1

- ◆ Restore the Boating Pond.
- ◆ Continue our programme of energy efficiency improvement works to residential properties.
- ◆ Develop The Stables as commercial units to provide a future rental income for PSVT and opportunities for local businesses.
- ◆ Demolish a small number of garages which are beyond economic repair.

Years 2 & 3

- ◆ Restore other village monuments.
- ◆ Complete the final year of our energy efficiency improvement programme.





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OUR FINANCE AND RESOURCES

TELLING THE STORY

This is how we engage with our audiences to promote the story of Port Sunlight. The following costs are included in our financial plans to help improve our visitor and resident experience:



Year 1

- ◆ Commission work to explore how Port Sunlight is currently used, including a transport and movement strategy and a site-wide access strategy.

Years 2 & 3

- ◆ Begin delivery of The Lyceum Project, which will ensure the long-term future of a key building and free-up other buildings for commercial rent.

RUNNING THE BUSINESS

These are the costs which support the above business areas, e.g. office costs, insurance and governance costs.



STRATEGIC PLAN 2025-28



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OUR FINANCE AND RESOURCES

OUR PEOPLE

PSVT is its people, and none of these plans are possible without representation from and the support of our employees, volunteers and trustees.

We are committed to diversity, equity and inclusion for all in everything we do. We also want all of our people to enjoy being part of our team and to have fun!

Governance

Our board of trustees is a group of highly skilled, enthusiastic individuals who together have extensive experience and knowledge of PSVT's business requirements. Resident representation on the Board is essential, ensuring strong links and continuous dialogue with our community.



Thank you for taking the time to read PSVT's new Strategic Plan.

We are keen to hear from everyone who has a stake in Port Sunlight, whether a resident, PSVT tenant, local business, funder or other partner.

If you have ideas for how we can deliver or even improve this strategy we would love to hear from you.

Employees

We aim to be an employer of choice and a brilliant place to work. We:

- ◆ Strive to attract, retain and develop a quality and highly-motivated workforce.
- ◆ Give our employees the structure and opportunity for personal and professional development.
- ◆ Provide excellent leadership.
- ◆ Celebrate great work, whilst expecting employees to be accountable for their individual performance.
- ◆ Reward our people with an attractive remuneration package and all the advantages of working for a diverse, vibrant and forward-thinking organisation.

Volunteers

We are highly appreciative of our volunteers who give their valuable time, skills and energy to perform a variety of important tasks including:

- ◆ Delivering guided tours of the village.
- ◆ Researching our collections.
- ◆ Supporting public events.
- ◆ Working with our landscape team to maintain our parks and gardens.
- ◆ Welcoming visitors to our museum, worker's cottage, and exhibitions.

We recognise that an inclusive and community-based volunteering programme is vital to a sustainable and successful future for both PSVT and the village as a whole. Harnessing volunteers' skills, inspiring people to take the initiative when it comes to tackling community issues, and contributing to the visitor experience are central to our mission.