



A 'health check' exterior survey for Port Sunlight's houses

Port Sunlight Village Trust (PSVT) is issuing this brief to commission a consultant for the design and implementation of a 'health check' conditions and alterations survey of Port Sunlight's listed houses. The consultant must be a surveyor with RICS Building Conservation Accreditation; a RIBA Conservation Architect or RIBA Specialist Conservation Architect; or a built heritage professional with full IHBC membership. All specialists must have direct experience in the survey, analysis and appropriate care of listed houses.

The aim of the survey is to measure the degree of change for exterior conditions and alterations over the past five years, using the prioritised treatments and non-conforming alterations reported in the Conservation Management Plan 2017 as the base line. The health check survey will include a sample of Port Sunlight's houses, selected by PSVT to demonstrate trends or patterns for change to the built heritage over time.

The results of the survey, reported as prioritised treatments, and itemised non-conforming alterations, will inform the action plan for the management of the built heritage for the next five years.

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 with decent and affordable housing and a wide range of facilities, services, policies, and incentives to ensure the well-being and advancement of his employees and their families.

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.

Most residential properties, public buildings and monuments are listed at Grade II. Two sections of the landscape are included in Historic England's register of Parks and Gardens of Special Historic Interest. In 2014, the village war memorial was re-designated as Grade I-listed. The village, set in 130 acres of parklands and gardens, is protected by conservation area status and covenants.

Today the village is home to just over 2,000 residents, a mixture of owner-occupiers and private tenants, and under normal circumstances attracts 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, from the village school and Grade II* listed church to two pubs, a hotel, conferencing 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 is responsible for:

- The landscape within the Conservation Area (except individual back gardens for houses).
- 292 of the Grade II-listed houses, 323 garages and 22 commercial and community buildings.
- Port Sunlight Museum & Gift Shop, including the Edwardian Worker’s Cottage and family interactive experience SoapWorks.
- A diverse group of monuments (listed and unlisted), museum collection, and village archive.
- Tackling social issues and promoting community cohesion.
- Managing the visitor destination and raising its profile through partnership working, marketing activities, visitor services, product development, and events.

PSVT employs 50 members of staff to discharge its charitable objectives and works with 18 volunteers across all areas of our operations from landscape gardening to building conservation. We are governed by a Board of Trustees with expertise in housing, surveying, finance, conservation, landscape, planning, museums, and heritage.

In 2019, PSVT launched its first [5-year strategic plan](#) articulating five strategic objectives for the organisation and village:

1. Conserve and promote Port Sunlight’s unique heritage in a sustainable way
2. Be a financially strong and well-managed, independent charity
3. Deliver high quality services across the estate
4. Realise the potential of Port Sunlight as a leading visitor attraction
5. Be a brilliant place to work

The [Conservation Management Plan \(CMP\)](#) was adopted for the village at the same time. However, the survey work completed to inform the CMP was finished in 2017. PSVT committed to an annual review of the action plan for the CMP and a five-year review of the plan itself.

The ‘health check’ survey commissioned through this brief represents an essential update to PSVT’s intelligence for the exterior material conditions and alterations to Port Sunlight’s listed houses.



Port Sunlight's Listed houses

William Lever's radical contribution for working class community design was bespoke architectural beauty for all. Lever Brothers, as corporate clients, and Lever as patron-collaborator, commissioned twenty-nine architectural practices for the design (and redesign) of Port Sunlight. Unlike earlier planned worker villages (such as Saltaire, Bromborough Pool, and New Lanark) and later model communities (such as New Earswick and Bourneville) that were designed for similar demographics, each terrace block in Port Sunlight was considered for its aesthetic merits. No two terrace blocks in the village are alike.

[Leading architects contributed designs](#), including Thomas H. Mawson, Charles Riley, Ernest Newton, Ernest George, and Edwin Lutyens. Over fifty years, they created a community with incredibly varied designs and rich decorative details such as leaded light windows, figurative parquetry, stonework and woodwork, terracotta mouldings, stone roofing and authentic half-timbering. The backs of the houses are treated more consistently and with fewer decorative or bespoke details. Each house originally had a paved yard with an outhouse and coal store enclosed by a tall boundary wall.

Each house has a front garden, with most houses elevated on a rise above street level. The terrace blocks are arranged into 'superblocks' around large central green spaces, which were originally set aside for allotments. Gardens and tree lined streets cut through the village and the public realm connects the bespoke and individualistic designs for the houses and community facilities.

All Port Sunlight houses were originally tenanted to Lever Brothers employees. William Lever died in 1925 and in 1929 Lever Brothers merged with Margarine Unie to form Unilever. Many houses were damaged during the Second World War. This damage was corrected by 1952 through a sensitive programme of salvage and reconstruction.

Houses across the estate were internally refurbished by Unilever from the 1950s-1970s, but with only minor exterior alterations at the rear. In 1965, nearly every house in Port Sunlight was listed at Grade II and in 1978 the village became a conservation area. Between 1979-1999, Unilever sold 600+ houses to sitting tenants. In 1999, Unilever created the independent charity Port Sunlight Village Trust (PSVT) to manage the village.

Summary of the general condition and integrity of the houses

Following is a summary of the treatment priorities and general conditions reported for the Port Sunlight houses in the 2017 Conservation Management Plan. The health check survey should assess condition and integrity against the reported results to determine the rate of change over the past five years. However, to expedite review, assessments should be for each terrace block rather than for the individual houses.¹

¹ Some terrace blocks stretch across two or more streets. If this is the case, they should be divided into blocks by street frontage.

Priorities

Deteriorated conditions were assigned treatments and a priority level for completing repairs. The priorities are split into three categories - high, medium and low. Priorities were assigned for the following reasons:

Low: Conditions which impact on the aesthetic character of the properties.

Medium: Conditions which, if not addressed, may impact on the structural or water-tight aspects of the house within five years.

High: Conditions which, if not addressed, may impact on the structural or water-tight aspects of the house in the very near future (1-3 year).

Summary of general conditions of houses

Erosion of building materials and inappropriate alterations are the greatest risks to Port Sunlight's heritage. Of the 918 houses surveyed, 552 need repair work, ranging from minor decoration to major structural repairs. (See CMP for a detailed description of the prioritised repairs.) There are 405 instances over 251 properties where a high priority repair is required within the next three years to prevent significant heritage loss. These high priority conditions include structural cracks, missing or damaged roof tiles and erosion of brick and stone walls. However, around 40% of houses need no repairs at all, and 44% of the work required is of a low priority.

Non-conforming alterations

The survey highlighted 32 properties with inappropriate uPVC windows, 35 illegal conservatories, 5 inappropriate rooflights, and over 350 properties with 'clutter' (security alarm boxes, trailing cables and security lights). Additionally, there were 141 satellite dishes installed without consent and plastic rainwater goods were noted at over 400 properties. Lastly, inappropriate exterior paint or finish treatments were identified at 178 properties.

Conditions to capture in the survey

The "health check" survey will be used to record changes to the exterior material conditions of and non-conforming alterations to listed houses in Port Sunlight village. This includes listed terraces and semi-detached houses in the Port Sunlight Conservation area. All exterior surfaces of the houses, their (visible) boundary walls, yard gates and outbuildings are included in the survey.²

Features to be surveyed include walls (all visible elements), roofs, windows (all visible elements), chimneys, doors, rainwater goods, ornamental finishes or details, boundary walls and outbuildings (including outbuilding roofs, walls, windows, doors and finishes). Enforcement issues should also be recorded, including inappropriate windows, doors,

² The condition of fencing or other boundary treatments, vehicular gates, drives, sheds and other structures is excluded from the condition survey. However, their presence should be recorded as they may represent an enforcement case.

conservatories, gates, boundary treatments (garden fencing, vehicular gates, etc.), finishes (paint or finish colours that do not comply with the estate colour scheme or inappropriate finishes applied to brick or stone surfaces), and clutter (for example, satellite dishes, security alarm boxes, trailing cables). Complete loss of features should also be recorded as a measure of condition (for example, ½ of a barge board).

Survey limitations

The survey will be limited to street and access road assessments. No hands-on, interior, or at height survey work is required. No materials sampling, testing or analysis is required. In some instances, deep gardens, boundary walls or garden fencing may obstruct visibility.

The survey work should be designed and implemented to record prioritised treatments and non-conforming alterations for terrace and semi-detached blocks rather than individual houses. This represents a change from the protocol for the 2017 survey, which assessed conditions (and reported on prioritised treatments) and integrity for each, individual house. The 'health check' survey and reporting methods will have to be altered to accommodate this change.³

Recording and reporting information

PSVT is commissioning this work to facilitate a comparative conditions and integrity assessment, tying the results back to the 2007 and 2017 survey work. Therefore, the consultant should use existing estate management frameworks to enable a comparative result. This includes pre-defined spatial labels (superblocks and address nomenclature), prioritised treatment levels, and description of non-conforming alterations.

Survey information for the 2007 and 2017 campaigns was recorded, analysed and reported in Access and Excel. For the 2017 survey, information was recorded directly into an Access database on digital tablets. The consultant may use other software platforms (including GIS) if they are compatible, accessible (open-source software) for PSVT, and will support a comparative assessment.

Overall photographs of each terrace (or semi-detached) block should be taken of the front and back of each surveyed property. Indicative changes (improvement or further significant deterioration) to the exterior conditions and non-conforming alterations (except clutter) should also be photo-documented for each terrace block. All photographs should be saved with a geo-spatial naming protocol and will become part of the survey records and results.

How information will be used

The results of the "health check" survey will inform the action plan for the revised Conservation Management Plan; support residents, PSVT and Wirral Council to prioritise areas of concern for the built heritage in the conservation area, and guide decision making

³ For example, instead of recording detailed treatments required for a single entrance door to a single home, the treatments and requirements for all entry doors will have to be assessed and reported as a percentage or similar.

for a comprehensive conditions survey programme to be developed by PSVT in 2023/24 and implemented over the next seven years.

Reports, files and copyright

Standards for photographs (file size and type), metadata, data storage and back-up and file sharing should meet or exceed the standards established by Historic England's [Digital Image Capture and File Storage](#) report. PSVT's preference is for photographs to be saved as JPEG files captured with 300 DPI. Photographs should be named with a geo-spatial identifier or key identifier to align with survey data. Metadata should include date, coordinates, and key word identifier.

Data should be captured, analysed and reported in open-source software. If proprietary software is proposed, this should be agreed in writing with PSVT through the contract for work.

Data, photographs, maps, and reports should be shared with PSVT as native file formats. Data, maps, and reports should also be submitted as PDF formats (draft and final submissions). Copyright should enable PSVT to use data tables, text, maps and photographs created for the commissioned work on its website(s), resident communications and external communications. All work will be credited with the copyright statement agreed in the contract for work.

Safeguarding and confidentiality

PSVT works in partnership with the community and key stakeholders to ensure the sustainable management of the Port Sunlight Conservation Area, including its over 900 listed houses. However, PSVT only owns a third of the listed houses. The other houses are in private ownership. The scope of this commissioned project includes properties in private ownership as well as homes owned by PSVT. It is important to note that PSVT owns all front gardens in the village (up to the façades of the houses themselves) and the access roads behind the properties. Rear gardens and yards are privately-owned spaces and are therefore not accessible.

PSVT will publicize the survey work through its social media channels, its residents' website and its residents' newsletter *The Gazette*. PSVT will also provide the consultancy team with a letter of introduction and description of work that could be shared with inquisitive members of the public.

The survey team must respect personal space and avoid photographing people, number plates and other identity-sensitive aspects of the Port Sunlight community.

Although the survey photographs will be geo-spatially identifiable, they are for estate management purposes only and will not be published. The consultant must not use spatially identifiable photographs for marketing or publicity, including publicly visible portfolios.

Scope of Work:

1. Review results, data fields and methods for recording, analysing and reporting prioritised treatments and enforcement issues from Port Sunlight's 2007 and 2017 Conservation Management Plans.
2. Design a survey and photograph documentation methodology and proposed outputs (data tables, charts, maps, text) to assess a sample of the Port Sunlight housing stock (by terrace block instead of individual houses previously recorded) sufficient to demonstrate current trends or patterns for change between 2017 and the present.
3. Propose methodology, methods and outputs to PSVT for approval.
4. Finalise survey methodology and proposed outputs (mock-up) for PSVT approval.
5. Implement survey, including photo-documentation of each block surveyed (front and back elevations) and indicative change in conditions or non-conforming alterations.
6. Analyse data collected from the survey work and collate into a readable and easy to use report, including data tables or charts, photographs, and maps.
7. Finalise report and submit (native digital formats, PDF and two printed copies) to PSVT.
8. Present findings to PSVT's Trustees and Leadership Team.

Skills and Experience

We believe that to deliver this piece of work successfully you will require the following skills and experience:

- Training in the materials, design, construction techniques, defects and modes or mechanisms of deterioration for listed houses
- Practical experience with exterior conditions survey and identification of non-conforming alterations for listed properties
- Practical experience with the design and implementation of repair, maintenance and conservation treatments for listed period houses
- Practical experience with the design and implementation of exterior condition and integrity surveys for listed houses, including photography
- Practical experience with data analysis, presentation and reporting for quinquennial assessments or similar reports for heritage properties
- Awareness of recognised legislation, charters, standards, guidelines and regulations for heritage assets
- Project management skills, including organisation of project schedule, deliverables and team
- Strong communication skills and ability to convey survey results with residents, professional staff and statutory agencies.
- Demonstrable methods for creating and maintaining records, including survey data and photography.



Equality Diversity and Inclusion

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

Budget

The total maximum budget is £12,500 + VAT, inclusive of all costs of delivery, such as materials, printing, events, and travel/accommodation.

Reporting relationships

You will report to Gareth Dean, Conservation and Maintenance Manager at Port Sunlight Village Trust.

Application method

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

- Your proposed approach, including survey methodology, deliverables (formats) and schedule to deliver the scope of work described above (60%)
- Examples of previous relevant projects, the names of two referees who have experience of working with you on similar projects and CVs for your team (20%)
- Breakdown of costs by scope of work (20%)

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

Guidance for submitting tender response:

Your fee proposal must be received in accordance with the following format and conditions:

1. Hard copy to be submitted in a sealed envelope which does not mention the name or can be used to identify the applicant. Proposals should be addressed to:
Gareth Dean
Port Sunlight Village Trust
23 King George's Drive, Port Sunlight
CH62 5DX
2. Your proposal must be received at the address above before 3pm on 25th April 2023.
3. Failure to meet the Closing Date or if a proposal is returned electronically it will be considered void.

Site visits are recommended prior to submitting your tender.

Timescales

Event	Date
Tender process opens	4 th April 2023
Tenders due	3pm, 25 th April 2023
Short-list interviews (online or in person)	Week commencing 1 st May 2023
Appointment and project start	Week commencing 8 th May 2023
Project Completion	1 st August 2023

Further Information

Please contact Gareth Dean, Conservation and Maintenance Manager, by calling 0151 644 4800 or emailing g.dean@portsunlightvillage.com

PSVT's 5-year strategic plan and 10-year Conservation Management Plan are available to download from PSVT's websites www.portsunlightvillage.com and www.portsunlightresidents.com .