



Brief for Consultant: Community Engagement Research and Options Appraisal

1. The Context

Port Sunlight Village Trust (PSVT) is a unique organisation, which manages the historic village of Port Sunlight for the benefit of residents, the wider community and visitors (www.portsunlightvillage.com).

PSVT has direct responsibility for around 300 of the village's houses and commercial properties as a landlord, and cares for a number of monuments and the landscaped green space across the site. PSVT also runs three venues which are open to visitors across the site: the Museum, the worker's cottage and the SoapWorks exhibition.

There is a complex network of stakeholders with an interest in Port Sunlight, including but not limited to:

- PSVT tenants
- Residents of privately owned houses in the village
- Residents of supported accommodation in the village
- Unilever
- National Museums Liverpool
- Wirral Council
- Merseytravel
- Commercial tenants
- Wirral residents
- Liverpool City Region governance, especially in relation to tourism and industrial strategy
- Visitors

While PSVT is a registered charity, established to preserve and promote the historic village, it is not a registered social landlord and therefore is not bound by the same rules in terms of affordable rents or tenant engagement. However the Trust is committed to managing the village in the best interests of the people who live here. We employ a Community Engagement Officer and work with residents to deliver a programme of events and useful services, while our conservation team supports residents with advice on how to maintain their historic listed properties.

At present, there are no formal arrangements for consultation and shared decision making with tenants and residents. Two of the board members are resident in the village, however they are not on the board as resident representatives. Recently, a group of residents has set up and constituted

a residents' association, and we have held initial discussions with them to explore how we can work together.

2. The Current Situation

PSVT is facing a number of challenges and external pressures. These include:

- Financial pressures as a result of rising inflation, which are increasing the cost of maintaining and managing the village, and have necessitated the raising of rents.
- Cost of living pressures being faced by village residents and tenants.
- The need for capital remedial works to the PSVTs assets, including memorials.
- The need to improve housing stock to address environmental concerns such as improving energy efficiency and tackling damp and mould.
- Disruption to regular methods of communication and engagement with village residents as a result of the pandemic (such as public meetings) which have not been fully reinstated.
- Slow recovery of the visitor economy post-pandemic which is having an ongoing impact on the Trust's income.

As a response to these varied challenges, PSVT is considering how it should approach resident engagement in the future. We are seeking consultants to carry out some initial work with us to explore best practice elsewhere and develop some options for consideration by the Board of Trustees, as part of a staged approach to developing new practice in our relationship with residents and tenants.

This staged approach is as follows:

Stage One – Re-establishment of regular channels of communication with residents

We have begun work on refreshing our communications with residents, local businesses and other stakeholders.

Stage Two – Scoping Research

Research models of resident/community engagement in similar contexts to PSVT and develop a range of options for consideration. Stakeholder consultation with residents and others to develop consensus around a new strategy to be approved by the PSVT Board.

Stage Three – Implementation

Development of strategy and implementation plan which set out PSVT's commitment to engaging with residents, the principles underpinning the strategy, the steps PSVT will take, and the responsibilities of residents and tenants to contribute to the process.

3. The Brief

We are seeking to appoint a consultant or team to work with us to support the delivery of stage two and stage three. Working closely with PSVT's Chief Executive and Director of Operations, the consultants will:

- Carry out research into a range of comparator organisations and how they manage their relationships and involve local communities in planning and decision making. We expect that this will require a mix of desk research and interviews. We are particularly interested in similar historic planned village communities across the UK, and can provide contacts via the Planned Villages Network, which PSVT was instrumental in founding. Registered social landlords and other forms of housing provider may also be particularly relevant. We are also interested in models from other sectors, such as health, heritage, education and community service providers etc and would encourage you to think outside the box.
- Consult a range of village stakeholders to gain an understanding of their perspective: what's currently working; what needs to improve; what are the priority issues to address; what is the appetite for further involvement and collaboration? This consultation should include PSVT staff and board members, Port Sunlight Residents' Association, local elected representatives and others. We will provide a contact list to support this process. We have previously carried out extensive surveys of Port Sunlight residents and have a good understanding of who lives in the village, their priorities and concerns, and will provide this information.
- Draw up a range of potential models for resident engagement at Port Sunlight. For each potential model we will need supporting information which enables us to understand the implications for PSVT and other stakeholders, setting out pros and cons; responsibilities of various stakeholders within the model; and any implications for PSVT's current governance.
- We would also want to understand the potential cost implications for each model, for example any additional staffing or communications costs for PSVT, and also any funding required by residents' groups in order to contribute effectively (for example training, meeting expenses etc).
- Facilitate a workshop for the team at PSVT to support discussions around preferred options and next steps, and produce a paper for board to approve the option which best meets the aspirations of both PSVT and local residents.
- Work up a detailed implementation plan for the preferred option, setting out actions for PSVT and partners. As the detail will emerge from the research and consultation process, we cannot be prescriptive about what the plan will include at this stage. We anticipate that it will identify actions for PSVT to take in communications, training, governance and other areas, and that the plan may also address capacity building, training and resource needs to support residents' participation. The plan should set out a timetable for full implementation and detail any associated costs.

4. Our Requirements

We are looking for a consultant or consultancy team with demonstrable experience of the following:

- Community engagement and consultation through formal and informal mechanisms
- Understanding of charity governance, community development and capacity building
- Strong research skills and an ability to present research findings clearly
- Excellent strategic thinking, and experience of working with senior leaders and boards to provide advice and guidance
- Strong facilitation and communication skills

- An ability to provide robust feedback and constructive challenge to leadership teams.

You will need to be available to deliver this work from July 2023 to March 2024, with stage two including a proposal for the Board on preferred options to be delivered by late November 2023 for discussion at our December board meeting. The implementation plan should be completed in late February 2024 for rollout commencing in 2024/5 financial year.

We expect to see a mix of online and in person meetings to deliver the consultation and facilitation elements of the brief and there will be some requirement to attend face to face meetings in Port Sunlight.

5. Fees and timetable

We have allocated a budget of up to £10,000 + VAT for this piece of work.

Deadline for tender submissions: Thursday 29th June 2023 at 5pm

Interviews to be held via zoom in the week commencing: 3rd July 2023

Start-up meeting with PSVT staff as soon as possible after appointment

Options appraisal report with recommendations for Board: by end of November 2023

Implementation plan: by end of February 2024

6. Application process

To apply for this tender opportunity, please submit a proposal containing the following:

- A biography/CV for each member of your team
- Examples of previous experience relevant to this brief
- A methodology and timetable setting out your proposed approach to the brief
- A breakdown of tasks and days allocated to each
- Details of two referees we can contact in the event of your appointment.

Tenders must be emailed to Lin Whalley, Director of Operations at PSVT by 5pm on Thursday 29th June 2023 at l.whalley@portsunlightvillage.com

If you would like an informal conversation about this brief, or have any queries, please email Kate Rodenhurst at katerodenhurst@mac.com