

Your Professional Adviser

This advice should be read with Diocesan Advisory Leaflet 3 *Your Quinquennial Inspection*.

The professional advisers referred to in this leaflet have an architectural or building surveyor background. Those appointed to carry out quinquennial inspections are called Quinquennial Inspectors.

1. THE BENEFITS OF WORKING WITH A PROFESSIONAL ADVISER

Churchwardens and other parish volunteers do a tremendous job looking after their church buildings and churchyards and often know huge amounts about them. But caring for such important buildings - whether modern structures, listed parts of our medieval heritage or something in between - is still a challenge. Help is needed and this comes from working with a professional adviser with the right architectural or building surveyor background (including training, experience and often accreditation) who is suitable for your church.

What do professional advisers offer?

The right professional adviser will understand the sorts of building they are involved with whether historic, modern or both. They will know about the forms of construction found in historic or modern churches, the different ways they behave and how to deal with them. They will appreciate churches as a special type of building and how they are used for mission, services and the community. And they will be familiar with consulting the DAC and heritage bodies about changes and repairs and getting the necessary consents for them.

The professional adviser will see your building as a whole rather than as a number of parts and spot problems, solutions and opportunities.

Amongst other things the professional adviser will:

- Carry out your quinquennial inspection and give ongoing guidance and support
- Identify the most important repairs needed
- Turn your ideas and vision into a physical and attractive form
- Produce the information needed to get advice, consents and grants
- Manage contracts – identifying the right work, costs and contractors and supervising and approving work
- Provide reassurance backed by professional standards and Professional Indemnity Insurance

What can happen without the right professional advice?

Asking a trusted contractor to carry out minor repairs and maintenance such as fixing a few slipped tiles can make sense. For works which go beyond that – such as repointing part of a wall - it can be tempting to use a local builder, handyman or a ‘friend of a friend’ who in truth has little or no specialist knowledge of modern or historic church construction and conservation.

Such ‘repairs’ frequently backfire, damaging the appearance and materials of a church, and can set the building back for decades. If it is possible to put things right it is likely to cost far more than if professional advice had been taken for from the start.

Working with the right professional adviser is therefore a must in caring for and developing your church in a way which: respects the efforts of those that built it and its importance and meaning; offers a welcoming and attractive setting for services and other events; is cost effective; and gives the building a positive future.

2. YOUR PROFESSIONAL ADVISER AND THE QUINQUENNIAL INSPECTION

A starting point for professional advice on your church – its condition, what needs doing and when - is the quinquennial inspection and the report that follows it. The quinquennial inspection report gives you a route map for the care of your church building.

Your PCC has a legal responsibility to appoint a professional adviser as Quinquennial Inspector and arrange for them to inspect and report on the building every five years. **Diocesan Advisory Leaflet 3 *Your Quinquennial Inspection*** should be read with this Leaflet.

Who can be appointed?

In appointing a Quinquennial Inspector the PCC must have regard to advice from the Church Buildings Council (CBC) and Diocesan Advisory Committee (DAC).

The CBC’s *Guidance Note on Commissioning Quinquennial Inspection Reports* includes a section on the ‘Appointment of a Quinquennial Inspector’ [https://www.churchofengland.org/sites/default/files/2020-07/Quinquennial Inspection CBC guidance 2020,%20v2.pdf](https://www.churchofengland.org/sites/default/files/2020-07/Quinquennial%20Inspection%20CBC%20guidance%202020,%20v2.pdf).

It says that it is important that a Quinquennial Inspector's training, accreditation (where necessary) and experience in building conservation is appropriate for the complexity and significance of the church building in question. The guidance sets out criteria for appointing a suitable person for four different categories of churches: Major Churches; Grade I or II* listed churches; Grade II listed churches; and unlisted churches. The criteria are given in a table which is copied in Annex A of this note. The table also mentions the value of experience of how heritage buildings can be made more environmentally sustainable.

Historic building conservation accreditation is normally required for Inspectors of listed churches and should be considered for unlisted historic churches. Information on conservation accreditation is given in the CBC guidance note and on the Historic England website <https://historicengland.org.uk/services-skills/training-skills/heritageskills-cpd/conservation-accreditation-for-professionals/>.

The most common and relevant accreditation schemes with respect to appointing a Quinquennial Inspector in the diocese are:

- Register of Architects Accredited in Building Conservation (AABC)
- Conservation Register (Royal Institute of British Architects (RIBA))
- Directory of Accredited Conservationists (Chartered Institute of Architectural Technologists)
- Building Conservation Accreditation Scheme (Royal Institute of Chartered Surveyors (RICS))

There are different levels of accreditation within the first three schemes which will need to be taken into account for some categories of church buildings. Comparable accreditation systems from other parts of the British Isles will also be valid.

The PCC must obtain and have regard to the advice of the DAC before selecting and appointing a Quinquennial Inspector. The DAC will give advice to PCCs on the criteria that a person should meet for their particular church.

The DAC will also keep a register of Quinquennial Inspectors currently working in the diocese for information. It will be available on the Diocese's website under Church Buildings.

Professionals may be considered for appointment whether or not they are on the register but PCCs should make sure that they meet the criteria and are the right person for their church building, taking account of the guidance from the CBC and the advice of the DAC.

The appointment of a Quinquennial Inspector is for one inspection and report in the first place.

Do we appoint an individual or a firm?

A PCC will appoint a Quinquennial Inspector as an individual rather than any firm or practice of which they are part. If that person retires or leaves then you would need to select and appoint a new individual following the requirements already set out. This could be someone from the same practice but it is recommended that a proper selection process takes place as described below before a choice is made.

A professional adviser who is part of a practice can draw on its other resources including the expertise of colleagues and to provide cover during leave etc. If the professional adviser works on his or her own, the PCC should satisfy itself that this would not be a disadvantage in terms of the service and support given.

We have an architect or surveyor in the parish – can we use them?

Someone with an architectural or building surveyor background whether in practice or retired can be very useful member of the parish and fabric or buildings sub-committee. However, it is not recommended that they should be employed as a Quinquennial Inspector or otherwise act as the church's professional adviser. Experience has shown that a clear distinction between the roles of the PCC as client and the professional adviser providing the service works best. The scope and terms and conditions of the service provided by the professional adviser should meet

professional and legal requirements, be clearly understood by all and set out and agreed in writing.

What else should we expect or require from our Quinquennial Inspector?

The service required from a professional adviser appointed as a Quinquennial Inspector should normally also involve a level of general advice and support through the five year period following the inspection. This could include giving guidance on a worrying change such as structural cracking or a failed rainwater system, a first response to an emergency such as fire or theft of roof, or to advise on suitable specialists or consultants that may be needed e.g. for heating or electrical services.

Making any alterations to the church, its layout or furniture and fittings - including new facilities or other developments - will involve **Statements of Significance and Needs**. These are a requirement with proposals which will involve a change to a listed church building.

If you have not already got a Statement of Significance, you may wish to ask your professional adviser to prepare one for you; this will be separate from the inspection and will usually incur an additional fee, but your Quinquennial Inspector will normally be well qualified to provide a Statement of Significance and can have it in mind when inspecting the church building.

Should we stick with our existing Quinquennial Inspector?

If a parish has a good working relationship with their Quinquennial Inspector and is satisfied with their inspections and the general service they give then that is good argument for continuing to use them. A successful, longstanding partnership, and the understanding of the church and its people that an adviser gains over time, are extremely valuable. So is a consistent approach to dealing with the building.

If you plan to retain your existing Quinquennial Inspector you will need to renew the appointment for the next inspection and report. It is still useful to review the last five years and whether your arrangement with them needs changing in any way and if their terms and conditions still apply. It will be helpful to have a two-way conversation with your Quinquennial Inspector to fine-tune the service and your working relationship. You should also talk about your plans and ideas for the next five years in preparation for the inspection.

Your existing Quinquennial Inspector may no longer be available because they are retiring or leaving the area, or you may decide you want a change for other reasons. Once you have made a new appointment you should write to the previous appointee notifying him or her of the change. You should also encourage the two to meet, so that the previous Quinquennial Inspector can pass on his or her experience and thoughts and hand over any relevant files.

3. YOUR PROFESSIONAL ADVISER AND OTHER PROJECTS

In addition to the quinquennial inspection, the general advice and back up that follow it, and possibly a Statement of Significance, you may well want expert advice on other work and projects. Such input from the right professional adviser is needed for the reasons given in the first section of this leaflet.

The parish should consider what additional tasks which will need the advice of a professional with an architectural or building surveyor background such as repairs, new projects and other work it has planned. As well as identifying, instructing contractors and supervising works these tasks could include: helping the parish and community develop its vision for the future of the building; developing designs for new facilities, extensions or buildings; and providing input to grant applications.

Do professional advisers for other projects have to be appointed in the same way as Quinquennial Inspectors?

Professional advisers for other church building projects and works do not have to be appointed following the same legal requirements and process as for Quinquennial Inspectors. They also do not have to be the same person. However, we normally recommend that professional advisers for other projects and work should meet the same standards required of Quinquennial Inspectors with respect to training, expertise and experience. It is key that they should be suitable for your church building and the tasks you want them to carry out.

Should I use my Quinquennial Inspector for other projects?

Your existing Quinquennial Inspector may be well-equipped for dealing with your planned projects as well as your inspection. There are certainly strong reasons why they should follow up the repair works identified in their inspection. Not the least of these is that a new professional adviser is likely to want to start from scratch and carry out their own inspection before highlighting what needs doing.

Asking the same professional adviser to cover all the work has other benefits too. They may be much happier to do small works on a limited fee if they know that other projects will enable them to recover their costs. The understanding of the church building gained by the Quinquennial Inspector should be an advantage when designing new facilities or an extension.

You may decide, however, that you want to divide tasks between professional advisers to make use of the different skills and experience they have.

What happens if I do want to split the work?

This approach will not break any legal requirement but it will probably not be the arrangement your Quinquennial Inspector prefers. It will be important to be aware of, understand and deal with such concerns. It will also be important to make clear what work each professional adviser will be required to do. They can then decide whether they want to be involved on that basis.

If the Quinquennial Inspector is not to be employed for a particular project, the PCC should of course inform him or her of its proposals. In these cases, the DAC may ask for assurance that the Quinquennial Inspector, as the person perhaps most familiar

with the needs of the building and with a continuing advisory role, is happy with the PCC's proposals. (There is a question about this in the faculty petition form.)

How much will my quinquennial inspection cost?

In this diocese, fees for quinquennial inspections are a matter for negotiation between the PCC and its inspector, but you may find the following guidelines helpful:

1. Fees may be agreed either on a one-off basis, or as a 'retainer' payable each year, including the cost of the inspection as well as general advice. Find out what kind of advice will be included without additional fees being payable.
2. The fee will normally reflect the time it takes to carry out the inspection and write the report (i.e. longer for a large church or a newly appointed Quinquennial Inspector).
3. The PCC should ask that the fee for carrying out the quinquennial inspection includes a meeting at which the Quinquennial Inspector presents his or her report to the PCC and provides advice on what to do next (as described in Advisory Leaflet 3).

What will professional advice for other projects cost?

Fees for other work are also a matter for negotiation. They will be based on a percentage of the value of the project, or charged on a time basis, or a lump sum. Professional advisers may be concerned solely with church work and they should not be expected to carry out work on churches for reduced fees.

Where your PCC is considering a major building or repair project, it is especially important that your professional adviser for that project is (a) selected with care, (b) clearly and fully briefed and (c) working to clearly defined and agreed scales of fees and stages of work. Remember that if a project is abandoned for any reason, the professional advisers are still entitled to fees for all work already carried out on the PCC's instructions.

4. PICKING YOUR PROFESSIONAL ADVISER FOR QUINQUENNIAL INSPECTIONS AND OTHER PROJECTS

It is essential that the professional advisor you appoint is suitable for the job or jobs you want them to do. The standards and criteria for a Quinquennial Inspector have been described in the second section of this leaflet along with the expectation that professional advisers used for other work will meet the same standards.

What else should I consider?

You should also think whether any of the grants you will be seeking for a project have special requirements for professional advisers. At the time of writing the National Churches Trust grant schemes require architects and building surveyors to have appropriate conservation accreditation as does the main Historic England grant scheme. The National Lottery Heritage Fund requires the same, or for an equivalent level of training, expertise and experience to be demonstrated, for the projects it will fund.

Grant bodies responsible for public money such as the National Lottery Heritage Fund have special requirements for the procurement of architects or building surveyors who will be involved in the projects they support. These requirements include different forms of competitive selection depending on the cost of fees. Professional advisers who have been procured in line with the Heritage Fund requirements can (at the time of writing) be used for any projects the Heritage Fund supports at the same church in the following five years if the total cost of their fees is less than a certain figure. Otherwise, architects or building surveyors will need to go through a competitive selection process for the National Lottery Heritage Fund project itself.

Some advice on accreditation and procurement is given on the National Churches Trust, Historic England and National Lottery Heritage Fund websites. The DAC team will give further advice on the accreditation and procurement requirements you will need to meet when seeking specific grants for your particular project.

What other reasons are there for competitive selection?

Picking your professional adviser through a competitive selection process takes some time and effort but has a number of benefits. It gives you the best chance of finding someone who will give a high quality and cost effective service which delivers what you want, and is a good fit with your church building and parish team. The selection may confirm that you should continue to use your existing professional adviser.

How do you go about selecting a professional adviser in this way?

Advice on the process for selecting and appointing your Quinquennial Inspector/professional adviser is set out in Annex B.

What should happen following your quinquennial inspection?

Advisory Leaflet 2 *Your Quinquennial Inspection* gives guidance on what you should do under 'Following the Inspection' including through the crucial follow-up meeting with your professional adviser. 'Getting on with repairs' covers some of the things you should think about first, specifications for work and getting DAC advice and permissions.

5. WORKING WITH YOUR PROFESSIONAL ADVISER

An effective and healthy relationship with your professional adviser will involve good communication, honesty, trust, respect and fairness. You and your adviser should form a productive team, overcoming problems together and sharing and celebrating your achievements.

The PCC's role as client – be in charge and act professionally

The legal responsibility for the church building rests with the PCC - this is often partly delegated to a buildings or fabric sub-committee. Your role as the client and the way you perform it is key. Your approach should be business-like and (even as volunteers) professional. Meetings should be chaired and clear decisions reached and noted.

To avoid difficulties later, it is important that for each piece of work the instructions to your professional adviser are always given in writing. All instructions should be agreed by the full PCC, unless they relate to matters which have been delegated to a fabric sub-committee. Your PCC should put in place a clear procedure which can be followed where works need to be carried out urgently, and it is important to have a main point of contact between the PCC and the adviser to avoid the giving of conflicting instructions or information.

It is worth repeating that where your PCC is considering a major building or repair project, it is especially important that your professional adviser for that project is (a) selected with care, (b) clearly and fully briefed and (c) working to clearly defined and agreed scales of fees and stages of work. Remember that if a project is abandoned for any reason, the professional advisers are still entitled to fees for all work already carried out on the PCC's instructions.

How should I deal with problems?

Professional advisers will naturally have more technical knowledge than parish volunteers – that is why you are using them. But you are the client and are responsible for managing your relationship with your professional adviser. You should expect and require the service they have agreed to provide. You may need to challenge and disagree with your adviser if you have good reasons for doing so. This should all be done in a spirit of openness, mutual respect and understanding.

Sometimes your relationship may come under pressure. You will be well aware of the stresses and demands you face but put yourselves in the shoes of your professional adviser too. What are they trying to achieve and how can you best help each other? Take time to raise and discuss issues in a dispassionate way so that you can find out and share what is working well and not so well and the reasons for both, before finding solutions to the problems together.

We recommend that all steps be taken in resolving the difficulties before ending a relationship with your professional adviser. If that can't be avoided then care needs to be exercised in how it is dealt with. Many professional advisers become committed to the building they look after and the majority will believe that they have done their best for it. If the separation is handled well then both sides should feel that justice has been done. Remember professional advisers are human beings too: they take pride in their professional work and many have their own personal faith.

Positive partnerships

Most relationships between parishes and their professional advisers are positive. Both will have the best interests of the church in mind and form an effective team which gets things done. Over time they will learn more about the church building and its care together and hand it on in good condition to those that follow.

More information and advice

- visit the Church Buildings pages of the St Albans Diocese website at <https://www.stalbans.anglican.org/dac/>
- contact the DAC team at dac@stalbands.anglican.org – Who's Who in Buildings tells you who does what <https://www.stalbans.anglican.org/dac/who-s-who-in-buildings/>

ANNEX A: CRITERIA FOR APPOINTING A SUITABLE PERSON TO THE ROLE OF INSPECTOR

From the Church Building Council's *Guidance Note on Commissioning Quinquennial Inspection Reports*' section on the 'Appointment of a Quinquennial Inspector' [https://www.churchofengland.org/sites/default/files/2020-07/Quinquennial Inspection CBC guidance 2020,%20v2.pdf](https://www.churchofengland.org/sites/default/files/2020-07/Quinquennial%20Inspection%20CBC%20guidance%202020,%20v2.pdf).

Criteria for appointing a suitable person to the role of Inspector

- Competent to inspect **Major Churches** (as defined by the CBC) which includes what used to be Greater Churches; proven experience of working with such large and/or highly significant and complex church buildings is recommended, at least at a junior level under a more experienced professional; and experience of working on Grade I or II* church buildings in a sole capacity. Relevant accreditation would normally be required, and always for professionals undertaking their first Inspector role.
- Competent to inspect **Grade I or II* churches**; proven experience of work in a sole capacity with listed buildings; proven experience of work with such highly designated church buildings at least at a junior level under a more experienced professional; preferably experience in sole capacity. Relevant accreditation would normally be required, and always for professionals undertaking their first Inspector role.
- Competent to inspect **Grade II churches**; proven experience of work in a sole capacity with listed buildings; preferably experience of working with listed church buildings at least at a junior level under a more experienced professional. Relevant accreditation would normally be recommended, and always for professionals undertaking their first Inspector role.
- Competent to inspect **unlisted churches**; no specific prior experience expected, but evidence of supervision from an experienced professional with experience of church buildings is recommended. For certain buildings, evidence of experience of working with traditional materials may be required.
- Given the recent call by General Synod for all parts of the Church to achieve year-on-year reductions in emissions, it would be valuable for the Inspector to have proven experience of how heritage buildings can be made more environmentally sustainable. This might include suitable ways to reduce heat loss, different approaches to church heating, and the possibility of renewable energy generation.

ANNEX B: PROCESS FOR SELECTING AND APPOINTING YOUR PROFESSIONAL ADVISERS

Preparation

First identify the work you want the professional adviser to do or may want them to do and over what time frame. Some of this may be clearly defined and definitely going ahead while other tasks and projects may still be in outline and less certain. The work may be that required from a Quinquennial Inspector: producing the inspection report and following it up and agreeing a way forward with the parish, plus giving a general level of ongoing advice and support over the next five years. Or you may be planning a range of projects on top of this.

For information on what a quinquennial inspection should achieve and cover see **Diocesan Advisory Leaflet 3 *Your Quinquennial Inspection***.

Include a list of expected tasks along with an introduction to the church building and a brief summary of recent inspections, issues and works in an **Information Note for Prospective Advisers**. For many churches this will be no more than one or two pages long.

Produce a **Pre-interview Form** (this is comparable to a job application form) which asks for factual information on accreditation, contract experience, fees and costs and other topics. It also asks for references and copies of two recent inspection reports for comparable church buildings, plus examples of work on similar tasks or projects.

Draft an **Invitation for Selection Letter** which sets out the selection process, criteria and timetable including proposed interview date and asks the professional adviser to confirm whether they would like to be considered for selection and to return a completed Pre-interview Form.

The DAC team can provide examples of an Information Note, Pre-interview Form and Invitation for Selection Letter to follow.

Shortlisting

Put together a 'long list' of say 5 or 6 professional advisers who you think would be able and suitable to carry out the work you want. The main part of this document describes the advice that the DAC will give on the criteria for appropriate advisers and its reference list of Quinquennial Inspectors working in the Diocese. You could ask parishes locally and/or which have had similar work and projects done successfully for the names of their professional advisers.

In appointing a person as a Quinquennial Inspector you must obtain and have regard to the advice of the DAC and it is best if you do that when you considering the merits of the advisers on your long list.

Next you should pick a shortlist of say three professional advisers that you would like to invite for interview.

Invitation to interview

Send the shortlisted professional advisers the Invitation for Selection Letter, the Information Note and Pre-interview Form you have already prepared.

If not all of the professional advisers are interested in being selected you may want to invite more so that you have three strong candidates to interview. The professional advisers may ask you for more information about your church such as a copy of the last quinquennial inspection report which you should send them.

Prepare for and plan the interview

It is helpful to have both a formal interview and to take the interviewees on a tour of the church and churchyard.

Agree the interview panel (3 members is ideal) and decide on the chair - e.g. Vicar, Churchwarden and a second Churchwarden or Chair of the Fabric Committee.

Agree the tour of the church building party (2 is ideal) - e.g. Churchwarden and congregation member or member of the fabric sub-committee familiar with the building and its recent history.

Agree the programme of the interviews. Slots of say 90 minutes should be allowed for each candidate which could typically be divided between:

- Introductions and first part of the formal interview (30 minutes)
- Church and churchyard tour (25 minutes)
- Second part and end of formal interview (10 minutes)
- Panel discussion of the candidate and scoring (15 minutes)
- Break and preparation for next candidate (10 minutes)

Agree the interview questions (which will follow on from but not repeat the questions asked in the Pre-Interview Form) and who will ask what. The questions will cover the candidate's expertise, experience, approach to buildings and projects like yours, and the type of service they will provide. Agree also how the interviewee's responses will be scored (e.g. out of 5).

The DAC team can provide an example of an interview structure and questions and advice on scoring.

The tour will give you the chance to spend time talking with the professional advisers and getting his or her first response to the building and site. (It is unrealistic to expect them to provide a detailed assessment or solution at this stage.) Is this someone who communicates well, who you get on with and can have confidence in?

The interview panel will have some follow-up questions after the tour and ask the interviewee if he or she has questions before the interview ends. The next steps and the timetable for making a decision and notifying the candidates should be spelt out.

The panel will get feedback from the tour party before discussing and scoring the different candidates and identifying the provisional first and second preferences. References should then be taken up.

The interview panel should discuss the references received and confirm their recommended choice. This choice should be agreed by the PCC and recorded in its minutes. All candidates should be thanked for their interest and told about the decision.

The chosen professional adviser should then send a Letter of Appointment to the Secretary of the PCC accepting the invitation to become Quinquennial Inspector and/or carry out other work as required and setting out their terms. These should be checked and, if necessary changed, before the appointment is confirmed. (A Draft Letter of Appointment which may not fit all of your circumstances is Appendix 1 of the Church Buildings Council's guidance on Commissioning Quinquennial Inspection Reports https://www.churchofengland.org/sites/default/files/2020-07/Quinquennial_Inspection_CBC_guidance_2020,%20v2.pdf.)

If a project is to be funded by the National Lottery Heritage Fund it will require evidence that the selection and appointment of the professional adviser has met its procurement requirements (as described in section 4). This may be given by PCC minutes which outline the selection process and note the decision made. Some guidance is given on the National Lottery website.

The paperwork produced by the parish for the selection process such as lists of interview questions should be kept in the parish records along with information related to the professional adviser appointed. Information related to the unsuccessful candidates should be kept for six months.

General advice on what information should be kept or deleted from parish records is given here:

https://www.lambethpalacelibrary.org/sites/default/files/care_of_parish_records_keep_or_bin_-_2009_edition_0.pdf.

Further advice on the evidence required, and retaining and disposing the information obtained and generated by the selection process, can be given by the DAC team.