

Guidance Note on Quinquennial Inspections and relations with Architects & Chartered Building Surveyors

1. Introduction

- One of the main ways in which the Church of England seeks to ensure that its church buildings are properly maintained is through regular inspection. Under the *Inspection of Churches Measure 1955* every diocese is required by law to establish a scheme under which each of its churches is inspected by a qualified person at least once every five years (the 'quinquennial inspection'). This note sets out the scheme in place in the Diocese of Guildford and gives guidance on how it can be used to best advantage. If properly used the quinquennial inspection process is of great value to both parishes and diocese in managing church buildings well and controlling costs. It is essential that these disciplines are adhered to if the Church is to retain its current freedom to manage its heritage buildings in its own way.

2. Overview

The essential requirements of the diocesan scheme, which is underpinned by law, are:

- Each church must be inspected by a suitably qualified person every five years;
- Responsibility for arranging and paying for the inspection lies with the PCC;
- The PCC appoints the inspector but must obtain advice from the DAC before making the appointment;
- The PCC must also have regard to general advice provided by the Church Buildings Council (CBC) on appointments to inspect Listed churches;
- The appointed inspector must carry out the inspection in person. It is not acceptable for another member of the same practice to do the work;
- Once the inspection is completed, the inspector must send a written report to the PCC, with copies to the Archdeacon and the DAC Secretary;
- If the PCC fails to arrange an inspection when due, the Archdeacon has power to commission one.

More detailed guidance on certain aspects is provided below.

3. Appointing the Inspector

The law governing the appointment of inspectors changed in April 2020 **but PCCs which already had a standing arrangement with an inspector at that date have no need to review the appointment: the new rules apply only to fresh appointments made from April 2020.**

Identifying a suitable inspector

Under the previous rules PCCs were obliged to select inspectors from a register of architects and surveyors whom the DAC had approved for inspection work, or request the DAC to add a new name to the register. Under the new system no prior *approval* from the DAC is required but PCCs must obtain the *advice* of the DAC before appointing and follow it unless they have good reason not to. Arrangements for obtaining DAC advice are described below.

It should be noted that the revised rules removed the previous requirement that inspectors should be qualified architects or surveyors, opening the way for other professionals to conduct inspections. The DAC is however unlikely to support the appointment of anyone who is not an architect or surveyor.

PCCs obtain details of potential inspectors from a number of sources including other parishes, but under the old system DAC registers of approved inspectors provided a useful starting point in many cases. The Guildford DAC is therefore retaining the old register (subject to the permission of inspectors named on it) and makes it available to parishes on request. It is also, with the inspectors' permission, adding to the register any additional individuals who the diocese has *advised*, under the new system, are suitable to act as an inspector, together with information about their suitability to inspect Listed churches.

The appearance of a name on the register signifies simply that the DAC has at some point regarded the individual concerned as a suitable person to carry out inspections. It does NOT in itself constitute formal advice from the DAC that the individual concerned is suitable for further appointments. Parishes MUST approach the DAC for advice in respect of every new appointment.

While the register may be a useful source for PCCs looking for a new inspector they should be equally open to appointing individuals not listed on it. It is essential for the future health of the Quinquennial Inspection system, which underpins the protection of our church buildings, that new and younger architects and surveyors are drawn into the work. Over the years there has been a steady trickle of new individuals taking up inspections and the DAC is anxious for this to continue.

Church Buildings Council guidance

The CBC is the national Church of England advisory body dealing with all aspects of church buildings. It provides detailed guidance on the handling of quinquennial inspections. The relevant guidance document is to be found on the CBC's ChurchCare website at:

<https://www.churchofengland.org/more/church-resources/churchcare/advice-and-guidance-church-buildings/quinquennial-inspections>

The guidance includes advice on the appointment of inspectors and among other things recommends that PCCs should interview at least three candidates. From April 2020, by law,

PCCs must have regard to CBC guidance as it relates to the Listed status of churches. The aim is to ensure that inspectors have the necessary specialist expertise to advise correctly on the condition and repair of Listed churches, the great majority of which are ancient or of considerable age.

This aspect is covered on page two of the CBC document, which provides selection criteria based on the Listed or non-Listed status of churches and specifies the extent to which inspectors should possess specialist conservation accreditation. There are various conservation accreditation schemes operated by professional bodies and organisations for architects, surveyors and related professionals. The CBC guidance does not itself list the schemes but cross-refers to the following Historic England document which does:

<https://historicengland.org.uk/services-skills/training-skills/heritageskills-cpd/conservation-accreditation-for-professionals/>

The schemes architects and surveyors inspecting churches in this diocese are most likely to have accreditation with are:

- The Register of Architects Accredited in Building Conservation (AABC)
- The Conservation Register operated by the Royal Institute of British Architects (RIBA)
- The Building Conservation Accreditation Scheme operated by the Royal Institution of Chartered Surveyors (RICS)

The DAC recognises these schemes and others as appropriate. With the new emphasis from April 2020 on the duty of PCCs to satisfy themselves that prospective inspectors are appropriately qualified, especially where Listed churches are concerned, parish officers may wish to pay greater attention to the issue of accreditation than in the past. The practice of acquiring formal conservation accreditation has been growing in recent years among professionals working on historic buildings. In today's environment any young architect or surveyor who intends to work in this field is well advised to acquire accreditation. But this has not always been so and there are individuals with a distinguished record of inspection work on historic churches, including some active in this diocese, who do not have formal accreditation. Where appropriate the DAC will continue to support the appointment of such individuals to inspect Listed churches in future.

In this connection, however, PCCs with Listed churches should be alert to an issue that could arise where they seek grant aid from a charity or national heritage body for repair work identified as necessary by their QI inspector. Where the inspector is an architect PCCs will often wish him or her to draw up the specification for the repairs, advise on tendering and see the work to its conclusion. But some grant-giving bodies may insist that the architect employed to do this has conservation accreditation. This is now true of Historic England (see Appendix 3 of

the CBC guidance document cited above) and may be true of other bodies. PCCs are advised to consider this dimension when appointing a new quinquennial inspector.

Obtaining advice from the DAC

A form for use by PCCs requesting advice from the DAC is to be found on the diocesan website. It may make sense to carry out this check early in the process of appointment especially where PCCs are considering more than one candidate. If the candidate(s) already appear on the DAC register it will not be necessary for parishes to provide details of their qualifications or experience. Where a parish is considering appointing someone not on the register it will be necessary to provide these details and the DAC may wish to interview the individual concerned. The DAC aims to complete this appraisal quickly and the process often provides useful feedback for both appointees and parishes.

The DAC's role in the system is essentially to act as a safety net to help ensure that inappropriate appointments are not made. It will not wish to involve itself in the parish appointment process or offer views on which of a range of potential appointees a PCC should choose. But the DAC Secretary is available to give advice if a PCC finds itself in particular difficulty.

4. Building a relationship with the Inspector

In law the only task for which the services of an inspector are required is the carrying out of the quinquennial inspection. But the Church strongly encourages parishes to establish an active long-term relationship with their inspector once appointed. They should regard him or her as their 'church' architect or surveyor, by which is implied (i) an expectation that the inspector will carry out subsequent quinquennial inspections until either side wishes to terminate the arrangement; (ii) an expectation that the inspector (if an architect) will where appropriate be appointed in connection with any repair work identified as needed by the inspection process; and (iii) an understanding that the inspector will be the first 'port of call' if immediate advice is needed between quinquennial inspections, for example because of storm damage or lead theft.

Establishing a lasting relationship of this sort, based on trust and depth of understanding, brings advantages for both parish and architect. It is also important that, having established such relationships, parishes do not exploit the goodwill of inspectors, many of whom are personally committed to supporting the work of the Church. Fees paid for quinquennial inspections (on which see below) tend to be modest by commercial standards. While many inspectors may be happy to provide quick advice on other matters free of charge, they will expect proper remuneration for carrying out additional work of any substance.

Where a parish is contemplating a building development it is always good practice to consider first whether the design work should be entrusted to their inspector, if an architect. Sometimes it may make sense to look elsewhere because a good inspecting architect will not automatically be a good conceptual designer. But in such circumstances it will be important to handle the relationship with the inspecting architect in a considerate manner.

Parishes that are likely to apply for major publicly-funded grants for repair or development projects on their churches (that is, projects for which professional fees exceed £10,000) should also be aware that, under current procurement rules, competitive tendering is normally required for the architectural and other design work involved. This may not be required if the parish desires to appoint their inspecting architect and the latter has been appointed as inspector by competitive tender within the previous five years.

In the light of the above, parishes will wish to approach the appointment of a new inspector with care. The advice of the Church Buildings Council that a range of candidates should be considered (see above) is sound.

4. Preparing for the Quinquennial Inspection (QI)

Good advance preparation will help both the inspector and the parish to get the most from the inspection. The parish should 'own' the process and engage with it actively, rather than simply inviting their inspector to do whatever is necessary and standing aside. The parish should:

- Look over the last quinquennial inspection report, note issues flagged up there as requiring attention and be clear how far they have been addressed in the interim. The log-book, which should record all work undertaken on the church building, should be made available to the inspector on arrival, as should the terrier and inventory;
- In the light of the above and any other considerations, inform the inspector if there are issues the parish particularly wishes to have covered by the inspection;
- Have available for the inspector the latest electrical safety test report. Electrical systems should be tested by a qualified electrician at regular intervals. It may be convenient for the electrical test to take place shortly before the quinquennial inspection;
- Similarly, have available any other relevant records of routine tests, for example of the lighting conductor, asbestos report, arboricultural and ecological reports, and Energy Audit, Eco Church Surveyor or other environmental report, if applicable; and seek where possible to have these conducted shortly before the quinquennial inspection;
- Ensure that adequate ladders or scaffolding are available to enable the inspector to reach all parts of the building that will need to be inspected. It might be sensible to use the opportunity thereby provided to clean gutters etc.
- if the inspector wishes to use a drone to inspect high areas that would otherwise be inaccessible, make sure that the operation is properly supervised and carried out by personnel with the appropriate training and permissions.

5. Carrying out the Quinquennial Inspection

The aim of the inspection is to check the condition of the fabric of the church building and its key fixtures, fittings and contents with the aim of identifying any element of deterioration or damage that needs repair or is likely to do so in the foreseeable future. The inspection also covers the churchyard, including trees and graves. Issues related to health & safety and provision for disability should be examined.

In the church building the inspector will be looking for signs of damage caused by damp, ingress of water, timber infestation, weathering, general wear and tear etc. Items to be checked will include the state of roofs and floors; the condition of furnishings and decoration; the state and safety of electrical and heating installations; and the condition of specialist items such as organs, bells and clocks (although inspectors will not normally have sufficient expertise to comment in detail on these). Particular attention should be paid to areas or items of high heritage value. A list of items and areas to be inspected is to be found in the Annex.

6. Reporting the outcome of the inspection

Following the inspection the inspector must within three months produce a written report for the PCC, with copies for the Archdeacon, and the DAC Secretary. While the diocese does not seek to impose a standard form of report the skeleton at Annex sets out clearly what issues need to be covered and suggests a suitable framework. The PCC should expect a detailed report completed to a high standard.

The key function of the report is to alert the PCC to issues that need attention. It must itemise these clearly and make recommendations for action. They should be categorised under the headings of URGENT, requiring immediate attention; ESSENTIAL within 12 months; ESSENTIAL within 12-24 months; ESSENTIAL within the next 5 years; and DESIRABLE, enabling the PCC to prioritise work.

The report should also include a brief *description* of the main features of the building, including the construction method and materials used. The best approach is to describe briefly each feature of the building (nave walls, East window, chancel roof etc) and then comment on whether it is in good condition or needs attention. This way the PCC will have assurance that the inspection has been comprehensive. Brief descriptive material will also prove useful in other contexts, for example in planning redevelopment work or applying for grants. Where no such descriptions already exist, the inspector should be invited to create them and be remunerated for the additional work. Thereafter they can be re-used each quinquennium.

7. Acting on the inspection report

It is for the PCC to act on the recommendations in the quinquennial report within the timeframes suggested. It is good practice for church officers immediately concerned with fabric matters to talk through the report with the inspector after receiving it. Where the report identifies major problems or issues it is wise to invite the inspector to meet the whole PCC.

Permission to proceed with all but the most routine repair work must be sought from the diocese either under full **faculty** procedure or under '**List A or B**' for minor works. Written guidance on this is available on the Diocesan website and the DAC Secretary will be happy to offer advice as needed.

As noted above, it is normal for the inspector to be invited to manage the process of commissioning and inspecting repair work arising from the quinquennial report. Parishes are not obliged to engage the services of the inspector but where they wish to use someone else they should inform both the inspector and the DAC. The DAC will need to be satisfied that the preferred appointee has the necessary expertise.

It is important to note that a description in the quinquennial report of a defect requiring repair is NOT an adequate basis for seeking estimates for the work or tasking contractors. The required work should be properly *specified* by the inspector or other architect commissioning and inspecting the work.

8. Keeping good records

It is important that the parish maintains good records of fabric-related matters and actions, including the Church Log Book which is a legal requirement. The more detailed and complete such records are, the easier will be the tasks of inspection and maintenance, and thus the costs involved will be reduced. These records should always be made available to inspecting architects or surveyors.

9. Fees and charges

The fees and charges for any work undertaken by the inspector are a matter for negotiation and agreement between him or her and the PCC. This matter should be settled before work is undertaken.

The diocese does not specify fee levels for quinquennial inspections but it is suggested that at present the fee be based on an hourly rate of not less than £85 per hour. As a broad guide the time needed for an inspection, including time on site, travelling time and the preparation of the report, may be of the order of:

Simple churches: 12 hours

Average churches: 16 hours

Larger or more complex churches will take longer.

Each church must be considered on its merits. Some small and simple churches may have considerable historic content or large churchyards or other complications, which can involve exceptional use of time. It may also be reasonable for an inspector to expect additional payment for an *initial* inspection of a church, especially where a clear basic description of the fabric cannot be inherited from a previous inspection report.

Over and above the basic negotiated inspection fee, PCCs must expect to pay appropriate expenses, and VAT may be charged. It may be necessary to use builders to provide ladders. Where significant repairs are recommended in the inspection report the PCC may wish the inspector to draw up an itemised schedule of works with approximate costs, for which a separate charge may be made.

The diocese regularly reviews this advice on fee levels.

10. The role of the diocese

The Archdeacons and the DAC (on which the Archdeacons sit) work hand-in-hand to ensure that the quinquennial inspection process operates well and that parishes receive good advice and assistance.

The *Archdeacons* check that parishes are up to date with their quinquennial inspection and are taking action on it as part of their regular *Articles of Enquiry*. They are also involved in the process of approving applications to carry out repair work under faculty procedures.

The *DAC* provides formal advice to parishes on the appointment of inspectors and maintains a register of architects and surveyors whom it has advised are suitable to carry out inspections. It seeks to promote good practice and support both parishes and inspectors. Like the Archdeacons it is involved in the approval of applications to carry out repair work. The DAC secretary will be able to assist with many queries on the inspection regime.

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Annex

The Quinquennial Inspection Report

The following is a suggested format for the Quinquennial Inspection Report including a list of those features of church and churchyard that should normally be inspected. The report should be concise and precise and should follow a consistent structure.

1. Introduction
2. Headline messages on the outcome of the inspection
3. Background information
 - 3.1. Church / Location / Orientation
 - 3.2. Diocese / Archdeaconry
 - 3.3. Local Authority / Statutory Protection / Listing / Conservation Area
 - 3.4. Architect / Date of Inspection / Weather
 - 3.5. Previous Inspections
 - 3.6. Checks of Log Book, Terrier & Inventory (Property Register)
 - 3.7. All recent specialist reports, including reports on asbestos/heating/electrical/fire protection/lightning/arboricultural/ecological/Energy Audit/Eco Church survey
 - 3.8. Work undertaken since last inspection
 - 3.9. Note of any areas of church not covered by this inspection, with reasons including lack of access and, if appropriate, recommendations for improved access
4. Findings of the Inspection
(to include brief description of the feature described, report on its state and any recommendation for repair with timescale/urgency, using the categories set out at para 6 of the guidance note above. Where there is more than one building inspected, each should be dealt with separately)

Church exterior

- 4.1 Roofs
- 4.2 Rainwater Installation and Drainage
- 4.3 Walling and External Finishes
- 4.4 Doors, Glazing and Ventilation

Church interior

- 4.5 Main Internal Features (ceilings & roof voids/ walls/ floors/ state of decoration)
- 4.6 Furnishings / fittings /organ / bells /clock etc
- 4.7 Fire Safety

- 4.8 Any other Health and Safety issues, including asbestos risk, where the inspecting architect/surveyor has reason to believe there may be concerns
- 4.9 Electrical Installations (Intake / Lighting / Power / Alarms / AV / Loop / Mechanical Services)
- 4.10 Heating Installations (Boiler / Distribution / Heat Emitters / Controls)
- 4.11 Lightning Protection (Air terminals, tapes, test clamps and earthing)
- 4.12 Ease of access for all to, into and within buildings (state of facilities)

Churchyard

- 4.13 Boundary walls & gates / Paths / Trees / Garden of Remembrance / Tombs & burial markers / Ruined Structures / Notice boards/ Lighting

Maintenance issues

- 4.14 Any comments or recommendations on routine maintenance regimes arising from the inspection. The parish may separately seek advice from the inspecting architect/surveyor on a costed maintenance plan if none exists.

Environmental Sustainability

- 4.15 Suitability for renewables / opportunities to reduce heat loss through steps such as draught-proofing / insulation
 - 4.16 Risk of impact of a changing climate on flood-risk, rainwater goods and stonework.
- 4 Summary of recommendations, in order of urgency