

# APPOINTING AN ARCHITECT OR SURVEYOR

## Guidance note

from the Diocesan Advisory Committee for the Care of Churches

The appointment of a professional adviser (architect or surveyor) is an important part of the PCC's responsibility. Selecting someone and creating a good working relationship with your professional adviser is important for the longevity of the building but also to give peace of mind.

The PCC needs an architect or surveyor whom they trust and can work with, even if their services are only required once or twice between each five yearly (quinquennial) inspection. Having someone available, who understands your church building, who will be there to provide advice and support, will be money well-spent.

### WHY DO WE NEED TO APPOINT A PROFESSIONAL ADVISER?

There are a number of reasons; it may be time for the quinquennial inspection, and from this there might be repairs and maintenance works required. The PCC may wish to re-order the interior, extend the church or place a building in the churchyard. It may be that the PCC just need some general professional advice to assist them in some way. All of these will require the services of a professional adviser.

### WHY DO WE NEED A QUINQUENNIAL INSPECTION?

The Inspection of Churches Measure 1955 (Quinquennial Inspections) and the Care of Churches and Ecclesiastical Jurisdiction Measure 1991 requires the PCC to commission a full inspection of the church building and its curtilage

(usually a churchyard) once every five years, and this is a statutory requirement. From this process it is likely that the PCC will require the advice and services of their inspector to assist them with maintenance items highlighted in the Quinquennial Report.

### THE PROFESSIONAL ADVISER AND THE PCC

Keeping to the same person each time for the quinquennial inspection is important, if possible, as this makes for better planning and programming of any works required. Also it helps to establish a professional relationship which is helpful and creative. A long term relationship enables your architect or surveyor to come to know in depth, the building's history, construction, and its problems. Your architect or surveyor should be regarded as the church's GP.



## HOW DO WE APPOINT A NEW PROFESSIONAL ADVISER?

Should the PCC wish to change their professional adviser, ensure a letter giving notice of your intent has been sent to your present adviser, explaining why you intend to seek elsewhere. Any recent work done for the PCC and not previously charged for may well be invoiced at this point.

To start, the PCC should set up a small group to create a shortlist of three or four names from the current list of approved inspectors which can be obtained from the Church Buildings office (01392 294945 or [dac@exeter.anglican.org](mailto:dac@exeter.anglican.org))

- Contact the Church Buildings office for advice on professional advisers appropriate for your particular building.
- Talk to other parishes that use the recommended professional advisers to see how well they work together.
- Contact the professional advisers to see whether they are able to assist – it might be that their workload is such that they are unable to help at that time.
- Try to meet the adviser at the church (good to see how they respond to your church) and visit their web site to see the type of work carried out by the practice. (See choosing your professional adviser below.)
- Having agreed on your preferred advisers, write a letter setting out the requirements of the PCC asking for the adviser's terms of appointment, fee structure and timescale, plus any additional costs i.e. the use of a builder to assist with access to roofs, and other high places. (Details for appointing an architect are found on [www.architecture.com](http://www.architecture.com), or [www.rics.org](http://www.rics.org) for appointing a surveyor.)
- A template draft letter of appointment is available from the Church Buildings Council <http://www.churchcare.co.uk/churches/guidance-advice/looking-after-your-church/quinquennial-inspections/documents>
- When the adviser has been appointed inform the Church Buildings office of your choice.

Further guidance on the general legal background and the appointment of an architect or surveyor is available from the Church Buildings Council at [www.churchcare.co.uk](http://www.churchcare.co.uk)



## CHOOSING YOUR PROFESSIONAL ADVISER

The majority of the churches in the Diocese are listed and historic, and looking after such buildings require knowledge and a sympathetic approach to materials and construction methods.

- Conservation skills and experience may be important should the PCC be looking to seek grant funding for repair works. The National Churches Trust for example will require the lead consultant to be conservation accredited\*; the Church Buildings office will be able to advise on the practices whose partners/staff carry the appropriate accreditation. Should the PCC wish to consider such grants it is advisable that they visit the funder's website at an early stage to ensure due process for appointing, has been met.
- The level of fees may impact on the final choice but should not be the sole criteria for your selection. There are no set fees for carrying out inspections, offering advice or preparing specifications or designs, and these must be agreed between the PCC and the adviser as part of the terms of engagement provided by the professional adviser between the two parties.
- You may be charged an hourly rate, a lump sum or a percentage of the construction cost. It is advisable to check whether out of pocket expenses such as prints of drawings, photocopies and travel are included and whether these are subject to VAT. Ensure that you are aware when you will receive invoices i.e. on completion, at the end of a work stage or monthly.
- If you are unsure about the appointment and fees do not feel uncomfortable about asking for further information.

### \* CONSERVATION ACCREDITATION AND PROCUREMENT

If you are likely to be involved in a project requiring grant aid, then certain organisations, such as the National Churches Trust, specify that the project must be led by an architect or chartered building surveyor who has conservation accreditation from the Architects Accredited in Building Conservation (AABC) at level 'A', the RIBA Conservation Register at Specialist Architect or Conservation Architect level, or is listed on the RICS Building Conservation Accreditation Register.

For grant funding from public bodies such as the Lottery, it may need to be demonstrated that the PCC's professional advisers have been appointed in a manner compliant with rules requiring an open procurement process. Detailed advice on this is available from the Church Buildings Council [www.churchcare.co.uk/images/procurement.pdf](http://www.churchcare.co.uk/images/procurement.pdf)

It is good practice to obtain at least three written quotes from potential new professional advisers, in order that procurement regulations are complied with. If the appointment is made in compliance with the guidelines at the outset, the PCC will have the evidence available if and when it is needed for subsequent grant applications.

The current DAC list of approved inspectors indicates those individuals who are accredited; up-to-date details are also available on [www.aabc-register.co.uk](http://www.aabc-register.co.uk) for the AABC scheme or [www.architecture.com/FindAnArchitect](http://www.architecture.com/FindAnArchitect) for the RIBA scheme and at [www.rics.org/accreditation](http://www.rics.org/accreditation) for surveyors.

## PREPARING FOR YOUR QUINQUENNIAL INSPECTION

It is important that on the agreed date for the inspection the church and its records are ready for the architect or surveyor. To complete an inspection in one day will require your adviser's full attention, so having agreed how they wish to proceed, it is best to leave them in peace to get to work on your behalf.

It is essential that a competent person with skills in using and fixing ladders assists the surveyor, unless they agreed otherwise, to ensure that you comply with the current Health & Safety Regulations regarding the use of freestanding ladders.

Ensure that there is access to all parts of the church and keys are available or doors are unlocked for the tower, bell chamber, vestry, boiler room, store rooms etc.

Bells will need to be down on the day of the inspection, and you will need to tell the adviser of any defects in the bell frame or tower which have been noticed since the last QI.

Ensure that any problems are explained to the adviser and draw their attention to any evidence of bats in your church.

Your inspector will want to look at movables and treasures, security and fire extinguishers and may ask to see the PCC's Health and Safety Policy, and Access Statement.

Make sure the following are available:

- The Log Book with details of additions, alterations and repairs since the last QI, with copies of the documents, drawings and photographs.
- Test certificates for electrics, boiler, fire extinguishers, lightning conductor, etc.
- Details of any Tree Preservation Orders or designated ruins.
- The Church Property Register, to check any items which the Archdeacon has directed to be inspected.
- All previous QI reports and all Faculty and Minor Works/List B papers.

## DEALING WITH REPAIRS NOTED IN THE QI

Inevitably the QI will show up repairs or possible major works that are required and it is good practice to ask your professional adviser to assist the PCC with how to deal with minor items, items which require a Faculty and works which are of such a scale that additional funding will be required. Meet with your adviser to discuss the report and how to progress. The PCC should seek further terms and conditions and fees for any services required for works arising from the QI.

For further information on commissioning works following the quinquennial inspection, please refer to the Guidance Note "Quinquennial Report – What Next?"



# APPOINTING AN ARCHITECT OR SURVEYOR FOR MAJOR WORKS

PCCs may wish to undertake work which involves re-ordering the interior, adding extensions to increase the facilities or placing a building within the churchyard. These projects require the services of an architect or surveyor to prepare a detailed brief with the PCC, and develop the design with drawings and eventually specifications for approvals, tendering and construction. It is not essential to stay with the inspecting architect however if they are willing to be involved and have the appropriate design skills, it makes good sense to use them on the basis that they know the building well; however the PCC should check other examples of their work for other churches. The nature of the PCC's proposals may mean that

an alternative designer is required and it is good practice and a common courtesy to advise the church's professional adviser of your search for a particular project.

A similar process to selecting your professional adviser as outlined above should be followed; the PCC should visit examples of their short-listed practice's projects and speak to their clients as a good working relationship will be essential, as you could be working closely together for a number of years.

Whether considering an architect or surveyor you might want to consider how they:

- Are briefed or compile a brief together with the parish members, and respond to that brief
- Create designs which take into account the surrounding buildings and the setting in general and relate to the local planning needs and regulations
- Advise on the need for other consultants such as structural engineers, etc.
- Advise the PCC on their responsibilities under the Construction (Design & Management) Regulations
- Advise on and consult with bodies such as Historic England, the Victorian Society, etc.
- Are prepared to offer advice on sources of funding and assist the PCC in their funding applications
- Assist the PCC with obtaining informal advice from the DAC and with making a Faculty application
- Produce the drawings, details, select materials and prepare the specifications and schedules of works
- Seek competitive prices from selected contractors
- Advise on the form of procurement and set up the building contract
- Ensure that the works carried out meet those agreed exactly under the Faculty and will advise whether the PCC need to discuss changes with the DAC due to unforeseen conditions on site
- Undertake site inspections as the works progress, administer the contract and report back to the PCC's contact
- Generally look after the interests of the PCC.

## THINKING ABOUT UPGRADING MECHANICAL AND ELECTRICAL SERVICES

Works such as new heating, lighting, a sound system or an audio-visual installation may be proposed. In such cases the DAC will ask the whether the church's architect or surveyor is content with what is proposed.

Where the installation of equipment involves building works or may involve fixing to historic fabric the

church's professional adviser should be involved at an early stage to assist in ensuring minimal disturbance to the fabric, and the proposed equipment is aesthetically appropriate.

## WORKING WITH YOUR CONSULTANTS

There are occasions, when for one reason or another the working relationship between client and professional does not run smoothly; any questions or concerns about fees or their performance should always be taken up with them in the first instance. Every terms of appointment will set out the due process required should you or your consultant wish to terminate the agreement. The appointment is between the PCC and the consultant, not the incumbent, the diocese or the DAC.

Good design comes from a strong understanding of each other's point of view and needs. Making assumptions will only lead to problems so both parties should provide clear explanations which are readily understood. Keep in touch and always check if unsure. To assist, the PCC should appoint one person as their contact point with the architect or surveyor; without this it is not unknown for unnecessary work to be incurred leading to unexpected costs.

### USEFUL ADVICE

- Repairs and new work usually need to be processed through the Faculty Jurisdiction procedure, however many repairs may be covered under List B. Some new works external to the church may require planning consent.
- Consult your professional adviser and the Church Buildings office at the outset for advice on what works require further consultations and permissions. However, until the DAC has received the full proposals it is not always clear as to what other bodies need to be consulted.
- If work involving re-ordering is being considered, the DAC should be consulted before the PCC engages its professional adviser and perhaps runs up unnecessary costs.

If you have any queries, contact:

Church Buildings Office, The Old Deanery, The Cloisters, Exeter EX1 1HS (01392 294945)  
dac@exeter.anglican.org; or consult the diocesan website:

<http://exeter.anglican.org/resources/church-buildings/>

