

CARLISLE DIOCESAN ADVISORY COMMITTEE FOR THE CARE OF CHURCHES



ADVICE TO PCCs ON COMMISSIONING QUINQUENNIAL REPORTS

January 2023

Legal and Technical Parameters

The Quinquennial Report is one of the key documents which assists the Parochial Church Council (PCC) in the care and repair of a church building, for which it is legally responsible. It gives an overview of the repair needs of the building, and lists the repairs required according to their priority.

Under the provisions of the Ecclesiastical Jurisdiction and Care of Churches Measure 2018, as amended by the Church of England (Miscellaneous Provisions) Measure 2020, referred to hereafter as “the Measure”, all parish churches in the Diocese, all other consecrated churches and chapels including licenced places of worship opted in under paras 38 to 44 of the Measure (previously the Care of Places of Worship Measure 1999), and buildings licensed for public worship, must be inspected at least once in any five-year period.

Each Diocesan synod must establish a scheme for the inspection and subsequent report on the parish churches in the diocese (and other buildings that have been consecrated or are licensed for public worship) every five years by a suitably qualified and experienced professional.

The Archdeacon can use the powers conferred by Sections 47 and 48 of the Measure to arrange for an inspection where one has not been carried out and for the inspection to cover extra matters of interest beyond the fabric if necessary; your DAC Secretary will inform you if this applies in your case.

Digital and where required paper copies of the report will be required by the DAC, the Archdeacon and by any grant-giving bodies which the PCC approaches and will be compiled or uploaded in a limited access section of the Church Heritage Record. It should not therefore be regarded as confidential to the PCC and the compiler of the report, even if the copyright belongs with the latter. Copies will be deposited by the DAC in the Diocesan Electronic Archive System.

Appointment of a Quinquennial Inspector

The appointment of a Quinquennial Inspector is an important part of every PCCs responsibility and is always of an individual not a firm. There is a great deal to be said for retaining the same person, year after year. It makes for better planning and programming of work, and it ensures that an established professional relationship develops that can be

both helpful and creative. Such a long-term relationship also means the Quinquennial Inspector learns a great deal about your church, about its history, its construction, and most importantly, its problems. Such knowledge and information is added to at the time of each succeeding inspection or detailed survey and also when repairs are undertaken.

Keep the lines of communication open and constructive from the outset. It is recommended that one person, normally a churchwarden, nominated by the PCC, is the channel of communication by the PCC and its professional adviser. It is sensible to let your adviser know when the contact is to change.

The appointment is for one inspection and report in the first place. It is important that a Quinquennial Inspector's **training, accreditation and experience** in building conservation is commensurate with the complexity and significance of the church building in question.

The Church Buildings Council (CBC) offers the following criteria in this regard. These should not be binding on either party but may be helpful to the PCC in their negotiation with their Inspector.

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.

The DAC maintains a list of Inspectors currently working in the diocese (See separate Appendix D). Professionals may be considered for appointment whether or not they are on the register. PCCs must seek the advice of the DAC as to their suitability, taking the above criteria into account. If you are looking for a new professional adviser, you should ensure that a letter giving notice of your intent has gone to your present adviser, explaining why you intend to seek advice elsewhere. Please note, some professional advisers are generous in their charging policy to PCCs, in particular with regard to aborted projects. If their appointment is being terminated, a fee account may well be raised for work outstanding.

When appointing a new Quinquennial Inspector PCCs should interview at least three candidates through a formal competitive appointment process (see Appendix A). This is good practice which should ensure that the PCC gets best value. This also allows the Quinquennial Inspector to undertake all publicly funded works within the next five years without the need for further tendering, if the PCC so wishes.

If the appointment is reviewed at the end of five years in the same way, this arrangement can continue, either with the same Quinquennial Inspector, or a new one.

Fees

The PCCs relationship with its professional adviser and contractors is subject to secular contract law, not ecclesiastical law. If the PCC is not satisfied with the service it receives or the outcome of the works, its only redress is through the secular legal system. It is therefore vital that the PCC is confident that it understands the professional adviser's responsibilities as well as its own liabilities. The PCC should also plan ahead by putting money aside each year to cover the fees.

Suggested Procedure for choosing your Professional Adviser

The following procedure is recommended:

- a. Appoint a small group to select a short list of perhaps three names from the current list of those approved to undertake inspections obtainable from the DAC office. Consult with other parishes who may help you with their experience of professional advisers. Geographical location should not unduly influence your choice as most advisers travel widely and may be able to combine a visit to your church with travelling to other jobs.

- b. Contact the professional advisers and ask whether they would be happy to be considered. Tell them that they are being considered alongside others if this is the case.
- c. If possible, arrange meetings with them either at their offices or at your church. If you go to their offices, you will be able to meet them on their own ground and appreciate their general approach. If you do visit, take along some photographs and a ground plan of the church to help to explain what your church is like and what your current concerns are.
- d. Ask for a written estimate for the fee to carry out the inspection and report. Note that there is no standard fee for this work. It must be agreed between the PCC and the adviser prior to the appointment. Guidance on the time a report can be expected to take is available in the separate guidance on Quinquennial Reports. Your professional adviser should provide you with terms and conditions and tell you whether the fees are subject to VAT and whether or not out of pocket expenses are included. It is good practice to ask for the fee to include a meeting with the PCC to answer any queries arising from the report.
- e. The group should then recommend its preferred choice to the PCC who should come to a decision on who to appoint. When this is agreed, appropriate letters should be exchanged outlining the terms and conditions of appointment. (See Appendix C)
- f. When you have appointed a new adviser, please remember to confirm his or her name to the DAC office. (See Appendix B)

Appendix A:

The tendering process for an Inspector

When choosing a new Inspector or reviewing the current appointment, it is advisable to seek at least 3 applications. The DAC will have a list of existing Inspectors in the diocese which you can choose from, or you may wish to consider a new applicant. In the case of the latter, early consultation with the DAC is recommended.

This form will help the PCC to make an informed decision.

The form can be submitted as evidence of tendering to funding bodies such as the National Heritage Lottery Fund, Historic England, National Churches Trust, etc.

Candidate	Relevant professional accreditation*	To invite to interview?
1 (name)		
2 (name)		
3 (name)		

*For details of professional accreditation schemes relevant to this role, see the Historic England website: <https://historicengland.org.uk/services-skills/training-skills/heritageskills-cpd/conservation-accreditation-for-professionals/>

Assessment criteria and scoring

Each of the below criteria will be scored 1 (minimal evidence/ not satisfactory) – 10 (excellent evidence / completely satisfactory) and the weighting shown below will then be applied.

Candidate: (Name)

Assessment criteria	Weighting (%)	Score (1-10) and comments	Weight x score
1. The candidate has demonstrated appropriate experience of work with unlisted / Grade II /Grade II* / Grade I listed / Major churches (see CBC guidance)	20%		
2. The candidate has demonstrated a relevant level of accreditation, skills and professional development (as advised by DAC with regard to CBC guidance) including relevant experience of environmental matters	30%		
3. Ability to work to the Diocesan Scheme and follow the CBC guidance	10%		
3. Evidence of the production of quality reporting which is clear and concise	10%		
4. Communication skills	10%		
5. Support from references	10%		
6. Clear and appropriate fee structure	10%		
Total			

Notes:

Appendix B:

Notification of Professional Adviser

Ecclesiastical Jurisdiction and Care of Churches Measure 2018 (amended 2020)

PARISH:

CHURCH:

IT IS HEREBY CERTIFIED THAT:

1. at a meeting of the Parochial Church Council of the above Parish, held on

.....
it was resolved that

.....
(Architect/Surveyor)

(being on the Diocesan Panel of Architects and Surveyors for the purposes of the Measure) be appointed by the Council to carry out an inspection of the above Church in accordance with the Diocesan Scheme.

2. the PCC have written to instruct the above Architect/Surveyor to carry out such an inspection and submit a report preferably **not later than 30th September 2023.**

SIGNED:

.....
(Chair of the Parochial Church Council)

.....
(Secretary of the Parochial Church Council)

One copy of this Certificate should be completed as soon as possible and returned before 30th April 2023 to: dac@carlisediocese.org.uk

Or by post to: Morven Anson, DAC Secretary, Church House, 19-24 Friargate, Penrith, CA11 7XR

A second copy should be retained in the Parochial Church Council Minute Book

Appendix C:

Draft letter of appointment

From a new Quinquennial Inspector to the secretary of the PCC

Dear

Inspection under the Ecclesiastical Jurisdiction and Care of Churches Measure 2018, as amended by the Church of England (Miscellaneous Provisions) Measure 2020

(name of church, dedication and diocese)

Thank you for inviting me to become Quinquennial Inspector to your church, an appointment which I am happy to accept. I will undertake the next quinquennial inspection in accordance with the provisions of your diocesan scheme (i.e. the scheme established by the diocesan synod of your diocese).

I will be happy to advise on, prepare specifications for, and oversee subsequent repairs where invited to do so, although please note that any such work may be subject to separate contractual arrangements and fees beyond those agreed for the inspection, and may also be subject to procurement regulations.

I shall be pleased to accept this appointment in accordance with the following terms:

1. The inspection of the church will be visual, and such as can be made from ground level, and from suitably secured and protected ladders and any safely accessible roofs, galleries or stagings. I may also if appropriate make use of Unmanned Aerial Vehicles (UAVs, "drones") and other technology by prior agreement and with the appropriate permissions.

Only selected areas will be examined in detail. Parts of the structure which are inaccessible, enclosed or covered will not normally be opened up unless specifically requested. The PCC shall provide ladders, access equipment and any other necessary assistance. I shall be pleased to discuss my detailed requirements for these with you.

2. When I come to inspect, I will need to see the logbook of alterations and reports and inventory of all articles. I will also need to see: -

a) a list of movable articles which the Archdeacon has directed me to treat as of outstanding architectural, artistic, historical or archaeological value, or of significant monetary value, or at special risk of being stolen or damaged.

b) details of any ruins in the churchyard (open or closed) and

c) copies or details of any Tree Preservation Orders affecting trees in the churchyard (open or closed), in a Conservation Area, or on the Gazetteer of ancient, veteran and notable trees; or any tree impacting on the building

3. The inspection will include as far as practicable all features of the building, covering all aspects of conservation and repair, and will include all articles, ruins and trees which the Measure requires the inspection to cover.

4. The report will be prepared and presented to conform to the requirements of the diocesan scheme, set out in accordance with the Church Buildings Council's current guidance, and reflect the General Synod motion calling all parts of the Church to work towards "net zero". The report will be submitted in electronic and paper form to the PCC, and copies in these formats will be sent at the same time to the archdeacon, the incumbent and the secretary of the Diocesan Advisory Committee (DAC). I accept that the report will be compiled and/or uploaded to the Church Heritage Record. Further copies will be issued in accordance with the directions contained in the scheme.

5. I shall deliver the report within three months of carrying out the inspection.

6. My fee for the inspection and report will be [...] [In addition to the fee charges mentioned in paragraph 3 above I shall charge the following out-of-pocket expenses: [...]

or
My fee for the inspection and report will be [...] [My fees are inclusive of out-of-pocket expenses].

VAT at the standard rate will be charged additionally on all fees and expenses.

The conditions of appointment will be set out in [the RIBA Standard Form of Agreement for the Appointment of an Architect / [the RICS Conditions of Engagement for Building Surveying Services] or other relevant document (copy attached).

7. The general good practice and spirit of our relationship will be as described in the CBC guidance notes on quinquennial inspections on www.churchcare.co.uk. I suggest you obtain a copy of these notes if you do not already have them.

8. I understand that my appointment as a Quinquennial Inspector will continue until terminated by either of us [and will be reviewed every 5 years]. Please keep me informed of any proposals or factors which may affect the care of your church, so that I may advise you to the best of my ability.

If you have any difficulty with any aspect of this agreement or subsequently my work, please feel free to contact [the senior partner of the practice] with a view to resolving the issue.

Please confirm that these terms of appointment are acceptable to you and your PCC. I attach a duplicate copy of the letter for you to sign and return to me as a record of the agreed appointment. Please then send me copies of previous reports or at least the most recent.

I am sending a copy of this letter to the incumbent and the Secretary of the DAC for information.

Yours sincerely