

## Appointing a New Inspecting Architect or Surveyor

This guidance document forms the formal advice of the Leeds Diocesan Advisory Committee for the Care of Churches, and is designed to be read alongside the Leeds DAC guidance on *Working with Inspecting Architects and Surveyors* (downloadable from the Leeds DAC website [here](#)), the Church Buildings Council (or ChurchCare) guidance note on *Commissioning Quinquennial Inspection Reports* (downloadable from the Church of England website [here](#)) and the Leeds Diocesan Scheme for the Inspection of Churches (downloadable from the Leeds DAC website [here](#)).

To save repetition, in this guidance note the word “architect” should be taken to include “building surveyor”.

### 1. THE ROLE OF THE INSPECTING ARCHITECT

All parish churches, consecrated churches and chapels and buildings licensed for public worship must be inspected at least once in any five-year period in accordance with the Inspection of Churches Measure 1955 (as amended 1991). The resulting report is known as the Quinquennial Inspection Report (often referred to as the QI or QIR).

It is the responsibility of the PCC to select an architect or surveyor, approved by the Diocesan Advisory Committee, to undertake the quinquennial inspection. This person will take on the role of inspecting architect.

The inspecting architect must be a registered architect or building surveyor who has appropriate qualifications and experience and they must have agreed to act in accordance with the Leeds Diocesan Scheme for the Inspection of Churches (adopted 18 March 2017).

In addition to carrying out quinquennial inspections, the inspecting architect will normally be asked to prepare specifications, oversee major repairs and to advise generally on matters affecting the church building and its surroundings. If an architect other than the inspecting architect is engaged for works on the church, the inspecting architect should also be notified by the PCC.

Evidence that the advice of an inspecting architect has been sought will, in almost all occasions, be required before faculty or List B permission can be granted. Certain exceptions apply in instances where works do not directly affect the fabric of the building,

such as restoration works to organs and bells, acquisition of small items such as communion plate, the sale of furniture and the erection of noticeboards in the churchyard. However, the assumption should be that any works requiring a faculty will require input from the inspecting architect, unless otherwise advised by the DAC.

## **2. REASONS FOR APPOINTING A NEW ARCHITECT**

A PCC may be looking to appoint a new inspecting architect because the previous one has retired or because the PCC is not happy with the service it has been getting. If the latter, written notice should be given to the existing architect before appointing a new architect. (The PCC should be aware that a final bill may be issued by the architect for any outstanding fees upon termination of their appointment. More information on this can be found in the DAC document, *Working with Inspecting Architects and Surveyors*.)

The Leeds Diocesan Scheme and the Church Buildings Council suggest that a PCC should take the opportunity to review its current inspecting architect appointment each time a quinquennial inspection is due. It may be that the PCC is content with its architect and the service they are providing and will decide to re-appoint, without any further action. However, a PCC may decide that it wishes to investigate the possibility of making a new appointment by carrying out a tendering process. There are advantages and disadvantages to both decisions.

The main advantage of reappointing an inspecting architect is continuity of care. Historic churches in particular (but also many modern ones) often have many hidden quirks and it takes time to fully get to know a building. In theory, previous quinquennial inspection reports should record a church in sufficient detail but, in practice, this does not substitute for personal knowledge of a building gained over years of working on it. Prior knowledge of a building will make it more efficient for an architect to update a quinquennial inspection report and familiarity will make it easier for them to provide timely and well-informed advice to the PCC, often without the need for a visit. An existing architect will also have an established relationship with the PCC and be aware of its specific needs. For these reasons, it can often be unhelpfully disruptive to change to another architect and it can be a false economy to appoint someone that seems, at face value, to be cheaper than the current architect.

However, going through a tendering process can reassure a PCC that it is getting the best service available and good value for money. Some funding bodies, such as the National Lottery Heritage Fund, require evidence of tendering for architects' services (particularly for larger projects), and will only grant funding for projects where the architect has been appointed by a tendering process in the last five years. If a PCC are planning works which will require funding in the near future, it may therefore be advisable to go through the tendering process at the point that the quinquennial inspection is due, even if the PCC then chooses to reappoint its architect. (More information on procurement can be accessed on the Church of England website: accessible [here](#)).

### 3. REQUIREMENTS FOR AN INSPECTING ARCHITECT

The PCC employs an individual architect, not a practice. In order to work on churches in the Diocese of Leeds an architect needs to have agreed to adhere to the Leeds Diocesan Scheme. The scheme includes a requirement that the architect will prepare quinquennial inspection reports in line with the Church Buildings Council guidance on the subject.

Architects must, under law, be registered with the Architects Registration Board. In order to be registered and legally be able to practice, architects must undertake seven years of study and practical training and adhere to a professional code of conduct. However, different architects have different specialist areas and not all will have the additional qualifications associated with the conservation of historic buildings. Building surveying is a wider discipline than architecture, and the experience and training of a surveyor is therefore more variable. Surveyors do not, by law, have to undertake specific formal training unless they are chartered, in which case they must also adhere to a professional code of conduct.

In order to be appointed as an inspecting architect, an architect or surveyor should be able to demonstrate they have the specific appropriate qualifications and accreditation, as well as experience of working on churches. If your church building is heritage listed, they should have prior experience of working on buildings of a similar grade.

The Church Buildings Council has suggested criteria for ensuring an architect is competent to work on various grades of heritage listed church buildings, which the Leeds DAC has adopted as requirements for architects working in this diocese, whether as inspecting architect or project architect. The criteria is set out below:

<b>Church listing grade</b>	<b>Necessary experience</b>
Grade I or II*	<ul style="list-style-type: none"><li>• Proven experience of work in a sole capacity with listed buildings</li><li>• Proven experience of work with highly designated church buildings at least at a junior level under a more experienced professional; preferably experience in sole capacity</li><li>• Relevant conservation accreditation would normally be required and is essential for those undertaking their first inspector role.</li></ul>
Grade II	<ul style="list-style-type: none"><li>• Proven experience of work in a sole capacity with listed buildings</li><li>• Preferably experience of working with listed church buildings at least at a junior level under a more experienced professional</li><li>• Relevant accreditation would normally be recommended</li></ul>

Unlisted	<ul style="list-style-type: none"> <li>• No specific prior experience expected, but evidence of supervision from an experienced professional with experience of church buildings is recommended</li> <li>• For certain buildings, evidence of experience of working with traditional materials may be required</li> </ul>
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The DAC holds a list of architects who have been appointed as inspecting architect at other churches in the diocese. This may be a useful starting point for PCCs. A copy of the current list can be obtained from the DAC staff, who are also able to identify other parishes where architects have worked, in order for the PCC to request references as part of its appointment process. It is important to bear in mind that the architects on this list will have a range of experience and accreditation and not all will necessarily have experience of working on higher grades of buildings, so the PCC will need to confirm the credentials of the architect and their suitability to work on the specific building.

An architect does not need to be taken from this list, but they must be able to prove to the PCC and the DAC that they meet the relevant criteria as set out above. If they cannot, the DAC will not give approval for their appointment. A PCC may be aware of an architect that it feels is capable (perhaps having worked on other historic buildings locally) but they do not meet the necessary criteria. There may be measures whereby such an architect can build up their experience, such as shadowing another architect in their practice that does have relevant experience, but it may be that the PCC is unable to appoint its first choice of architect if they cannot demonstrate that they have the specific skills to work on churches.

The relationship between the PCC and its architect is a matter for mutual trust and professional understanding. In selecting an architect it is important that the PCC ensures that their chosen architect has not only the requisite experience but also the appropriate personality and personal style to work in conjunction with the parish. Appointments made solely on the cheapest quote can, as in so many other fields, prove unsatisfactory.

#### **4. PROCESS FOR SELECTION**

Appointing a new inspecting architect can be a daunting prospect for PCCs. The following is a procedure which has worked well.

- Appoint a small group of people who are able to meet with the architects and come back to the PCC with a recommendation.
- The group should select a shortlist of names, sufficient to ensure that at least three responses are received. If the PCC is considering an architect with no prior experience working with the Diocese of Leeds, it is strongly encouraged to speak with the DAC for its views before inviting the architect to tender.
- Architects can then be contacted and asked if they would be happy to be considered.
- Assuming that they are, the group could then either meet each architect at the church for a discussion or could ask if the group can meet at the architect's office.

Visiting an architect's office gives PCCs a feel of how big or small the architect's practice is, the general style, and the resources available as well as sort of work done by the practice and how this might fit with the PCC's requirements. When visiting an architect's office, take along some photos and a ground plan of the church as these will help explain what the building is like and any areas for concern. It may also be helpful to take a copy of the statement of significance, if available.

By meeting an architect at the church the PCC can gauge the architect's understanding of the building by asking their advice on which particular aspects of the building they believe are important for the ongoing care and development of the church.

The DAC firmly discourages PCCs from appointing someone that is part of the congregation or who has strong personal connections with the church family. Please see Appendix A for further explanation of this, and for further guidance on what to look for and ask during the tender and interview process. A sample checklist for assessment and scoring is also included as an appendix to the ChurchCare guidance.

Once a PCC has selected its preferred architect, it must notify the DAC and Archdeacon of its choice, so that this can be noted on the register maintained by the DAC.

#### **5. FEES AND TERMS OF ENGAGEMENT**

Work undertaken by an architect, including quinquennial inspections, must be commissioned by the PCC and is subject to the payment of professional fees. In the Diocese of Leeds, the payment of architect's fees is the sole responsibility of the PCC.

Terms of engagement and architect's fees should be discussed and agreed in writing by the architect and PCC at the outset of the appointment of an inspecting architect, before any work commences and any fees have been incurred. Guidance and examples of terms of engagement documents, can be found at the Royal Institute of British Architects (RIBA)

website (accessible [here](#)). There is also a template appointment letter in the appendix of the ChurchCare guidance on commissioning quinquennial inspections.

For the appointment of an inspecting architect and for major projects it is strongly recommended that two copies of these agreements are prepared by the architect and signed by both parties, with each party retaining one copy. For smaller projects, a simple agreement via exchange of letters may suffice. The written agreement protects a PCC if anything goes wrong or if there are any challenges on fees or services, so it should be sufficiently robust. In addition to the written agreement, evidence should be provided that the architect holds Professional Indemnity Insurance up to a value of £250,000 for each and every claim.

Quinquennial inspections are usually charged for on a lump sum basis, which may vary depending on the size of the church. In the Diocese of Leeds, there is not set fee standard for quinquennial inspections. In addition to establishing what an architect will charge for quinquennial inspections, it is important to understand what they will charge for project works and ad hoc advice, which will often be either a percentage of the cost of a project or time-charge. (Further guidance on fees for project work is outlined in the guidance note *Working with Inspecting Architects and Surveyors*.)

The fees should be fair to both parties and sufficient to ensure that a proper professional service will be provided. Most architects charge very reasonably for quinquennial inspections, bearing in mind the number of hours spent both on site making a thorough survey and the time taken to write and prepare a report that adheres to the guidelines and is sufficiently comprehensive and robust. The lump sum figure charged is, in general, artificially low for the professional service that is provided.

## **6. NOTIFYING THE DAC**

The legislation in respect of quinquennial inspections states that appointments of persons carrying out inspections on church buildings shall be approved by the DAC. As such, once the PCC has selected its preferred architect, it should contact the DAC secretariat to inform it of its choice. The DAC must be contacted regardless of whether the PCC is proposing an architect from the list of those working in the diocese or an architect with no prior experience in the diocese.

The DAC will confirm if it is content with the proposed appointment and will update its records. If the DAC is unfamiliar with the proposed architect, it will seek evidence of their experience and qualifications. If the DAC has concerns over a proposed appointment, these will be discussed with the Archdeacon (who has a statutory responsibility to ensure that every church is inspected to their satisfaction) before feedback is given to the PCC. If the DAC is unwilling to accept a proposed appointment, it will give clear reasons to the PCC, with reference to the criteria set out in section 3 of this guidance note.

If you have any queries please contact **Lisa McIntyre** – DAC Secretary - on 0113 3530 277 or [lisa.mcintyre@leeds.anglican.org](mailto:lisa.mcintyre@leeds.anglican.org)

Disclaimer: The advice and information within this document is given in good faith and is based on our understanding of the current law. The DAC cannot accept any responsibility whatsoever for any errors or omissions which may result in injury, loss or damage including consequential or further loss. It is the responsibility of the PCC to ensure that it complies with its statutory obligations.

## APPENDIX A

### WHAT TO LOOK FOR AND ASK DURING THE SELECTION PROCESS

#### Geographical location

It may seem sensible to choose the architect who lives nearest to the church, but this should not influence the choice unduly. Most architects travel widely and will not always need to make a special trip to the church. It is important when appointing an architect to be clear on how and when the architect will charge for travelling expenses.

#### Conservation skills experience and accreditation

If the church building is historic, and particularly if it is listed, the architect should be able to demonstrate that they have plenty of experience with historic buildings.

Relevant accreditation will also demonstrate experience in the field. Many of the major grant funding bodies require a PCC to employ an appropriately accredited practitioner, so this is particularly important if there is an intention to apply for grants for any upcoming works. Current guidance on accreditation can be found on the Historic England website: <https://historicengland.org.uk/services-skills/training-skills/heritageskills-cpd/conservationcreditation/>

#### Fees

It is important to check the architect's fees for quinquennial inspections, as these are not standardised and are set by the individual practice. An increasing number of architects are charging for extras on top of the standard fees. These extras can include travelling expenses, photography, copying, etc.

More significant is the architect's policy on charging for other work, beyond the scope of the quinquennial inspection. The prospective architect should provide a fee structure for this kind of work. It would be advisable to ask about the architect's policy on "casual" advice for when the PCC wishes to make brief enquiries by email or phone, or possible projects that never get off the ground.

#### Church experience

If the architect is actively involved in their own church this may be helpful, however it is not essential. What is important is that the person is in sympathy with the requirements of the PCC and is prepared to work with the voluntary structures of the PCC and/or fabric committee.

The architect should be able to provide examples of their work on church repair projects, church re-ordering projects or church extensions. Architects should also be able to demonstrate that they are familiar with a selection of suitable contractors with known experience of church projects.



### Access

The architect, or their appropriate delegated representative, should be able and willing to access all areas of the building inside and out, using either existing access ladders on site (if deemed safe to use) or access equipment that they provide, possibly at additional cost. If parts of the building are physically inaccessible or the cost of getting access is disproportionate then it may be acceptable to use remote means of inspection (e.g. drone cameras)

### Professional Indemnity Insurance

Check that the architect is covered to a value of £250,000 for each and every claim. It may also be helpful to look for a history of any claims. Under the revised Construction Design and Management (CDM) 2015 Regulations all projects that require more than one trade (eg. an electrician and a decorator) will require formal appointment of a principal designer (who assembles information on the risks associated with the design and prepares the Health and Safety File) and a principal contractor (who will prepare a health and safety plan for the work and manage health and safety on site). Until such time as the formal appointment is in place the client is deemed to be the principal designer or/and principal contractor.

### **APPOINTING SOMEONE THAT YOU KNOW**

It may be that the PCC would like to appoint an architect who is already known to the parish. As a general rule, however, the DAC does not encourage PCCs to use an architect who has close connections with the parish. Conflicts of interest can sometimes occur which may place the PCC or its architect in a difficult position. Even where there is no direct conflict of interest the relationship may cause difficulty or embarrassment to the PCC if things do not work out satisfactorily.

This is especially so if the architect is doing the work for nothing or for a reduced fee, perhaps as a form of Christian stewardship. A number of parishes have found it difficult in these situations to apply the necessary pressure if things have not progressed as smoothly as they should. For this reason it is usually wiser to maintain a strictly arm's length relationship and to avoid appointing a parishioner or even a close friend of a parishioner, so that the PCC's hands are not tied.