

A Guide to the Process of Appointing a Quinquennial Inspector and/or Lead Consultant

It is the responsibility of the PCC to appoint a suitably qualified and experienced professional to undertake the Quinquennial Inspection (QI) and then plan/oversee the arising repairs.

A good Quinquennial Inspection report (QIR) helps a PCC to understand the repair needs of the church for which they are responsible and is particularly valuable in identifying issues before they become major and expensive problems.

It is important to appoint a professional who has the appropriate level of experience, knowledge and conservation accreditation for the type and listing of a church (see Appendix), and someone who will work well with the PCC and vice versa.

If it is likely that grants will be required to fund repairs (and other building works), it will be necessary to demonstrate that the appointment process has followed the procurement legislation that covers the use of public funds. Public monies are those obtained through grants from the National Lottery Heritage Fund (NLHF) or occasional government schemes, which are typically administered by Historic England (see Appendix). Other funders may also set their own rules regarding procurement and tendering.

Process of Appointment

The PCC should review the appointment of the QI architect/surveyor every 5 years. There are three options for appointment:

- Reappoint the Inspector who undertook the last inspection
- Obtain a minimum of 3 competitive quotes or tenders
- Conduct an open tendering process

The advantages and disadvantages of each are set out in the table on the next page.

Some things to consider when making this decision

- Does the PCC enjoy a good/satisfactory relationship with the current Inspector or is it time for change?
- Does the building appear in a reasonable condition or is it anticipated that major repairs are likely in the next 5 years? For example, did the last QIR identify significant repairs which it has not been possible to undertake, or are there obvious items which now need attention?
- Does the PCC have other plans beyond repairs, such as adding additional facilities or a reordering project? If so, a more extensive appointment process might be desirable in order to attract the person with the most appropriate skills and experience as a designer.

As a first step, the PCC should determine whether there are any outstanding fees owing to the Inspector who carried out the last inspection. This can arise when professional time has been expended at the behest of the PCC, but the associated works have not been undertaken.

Advantages	Disadvantages
Option 1: Reappoint the Inspector who undertook the last QI	
<p>Straight forward process</p> <p>Time efficient for all parties</p> <p>Inspector knows building and can offer some historic perspective</p> <p>Inspector is known to the PCC and vice versa</p>	<p>Limits the amount of public funding that can be accessed for repairs and minor capital works with a maximum value of £76,500 (based on a 13% fee). If the works are more than this figure, even if phased*, a competitive tendering process would subsequently have to be undertaken.</p> <p>Doesn't enable the PCC to test that they are receiving value for money or see what other professionals have to offer.</p>
Option 2: Obtain a minimum of 3 quotes or tenders	
<p>Enables the PCC to ensure that they are receiving value for money.</p> <p>The PCC can choose the Inspector with whom they believe they can work.</p> <p>Would cover building work, which requires public funding, to a value of £384,000 (based on a 13% fee).</p>	<p>Loss of accumulated knowledge if current Inspector is not reappointed.</p> <p>More time consuming.</p>
Option 3: Conduct an open tendering process	
<p>Enables the PCC to ensure that they are receiving value for money.</p> <p>The PCC can choose the Inspector with whom they believe they can work.</p> <p>Covers projects up to £1.2M</p>	<p>Loss of accumulated knowledge if current Inspector is not reappointed.</p> <p>A more extensive process, requiring more time and input from all parties.</p>

Please note that the procurement rules relating to public funding apply even if a project is divided into stages during the 5-year appointment period. This is called aggregation. Please see appendix for more details.

Option 1: Re-Appoint the Current Inspector

We recommend use of the standard quotation form to send to the current architect/surveyor, so that they can confirm their fee and set out the services offered. This is the ideal opportunity for the PCC to raise any questions with the inspector, especially if there are queries over the scope and range of the service. There are some architects/surveyors who will only carry out quinquennial inspections and offer advice on repairs, so the PCC would need to appoint someone new to lead any building works.

The PCC should inform the DAC Secretary when the appointment has been confirmed.

Option 2: Obtain a Minimum of 3 Competitive Quotes or Tenders

Quotes versus Tenders

A quotation gives the estimated costs for a particular job or service. It is usually used for lower value, relatively simple pieces of work. Tendering is an invitation to bid on a specific project; it is a more formal process better suited to higher value and/or more complex building projects.

If the PCC is unsure what repairs might be required in the next 5 years, and have no other plans for the building, we recommend use of the standard quotation form. This provides a 'middle way' which will cover medium to large sized repair projects arising from the QI report.

If, however, the PCC knows that significant repairs will be needed, and/or have plans for other building works such as installation of kitchen, toilet, heating etc. we recommend carrying out a tendering process in order to appoint a suitable professional who can be the QI Architect, and Lead Consultant on any building works. An example of an Architect's Brief is available on request.

Inviting Candidates

The Church Buildings Team have a list of architects and surveyors working in the Diocese which is available on request. This is not a list of recommendations, and the PCC is free to appoint someone who is not on this list as long as they have the appropriate experience and conservation accreditation (see Appendix).

The PCC should draw up a shortlist of potential candidates and then invite them to submit a quotation or tender. The current inspecting architect/surveyor should be invited unless the PCC is dissatisfied with them.

Interviews and References

If, based on the quotes/tenders, the PCC decides to re-appoint the existing inspector, there is no need to interview the other candidates. If, however, the PCC is considering a new appointment, all the candidates should be interviewed. The PCC is also encouraged to take up references from other churches. It must be clearly stated in the invitation/advert if interviews will take place with a proposed date where possible.

Decisions do not need to be made on cost alone. Instead, they should be based on value for money which should take into account other factors such as quality and experience.

Once the PCC has selected and formally appointed their Inspector, out of courtesy they should:

- Notify the DAC Secretary so that the records can be updated
- Tell the successful candidate and confirm the terms of the appointment with them
- Thank those candidates who responded to the invitation/advert but were unsuccessful.

PCCs are advised to retain proof of the process, particularly if it has not been possible to get at least three quotes/tenders. Keep records of any responses received declining the invitation; evidence that the PCC tried to get three quotes/tenders is acceptable to most grant giving organisations.

Option 3: Conducting an Open Tender Process

This is a requirement for a major project with professional fees over £50,000, requiring substantial support from public funds. Where public money isn't needed it is still recommended, particularly for churches listed Grade I and II* (see Appendix).

It is more complex than the tendering process described in Option 2.

The tender opportunity must be advertised widely, and responses are generally invited in two stages. A minimum of three candidates should be interviewed, although five is preferable. The PCC is required to produce a report on the process and the tenders received, together with an explanation of the decision on which to accept. The PCC must give full reasons for the choice, particularly if the lowest tender is not accepted. Decisions do not need to be made on cost alone. Instead, they should be based on value for money which should take into account other factors such as quality and experience.

If the church is listed Grade I or II*, then attracting a wide pool of applicants will be important.

Please contact the Church Buildings Team for advice on this process.

Contacts for the Church Buildings Team

DAC CASEWORK

All initial enquiries about works to your building or churchyard and queries about the faculty process or applying for consent should please be directed to the Church Buildings office on 01353 652729 or via dac@elydiocese.org

Geoffrey Hunter - DAC Secretary and Head of the Church Buildings and Pastoral Department

Telephone 07961 034 780 / 01353 652737 or email geoffrey.hunter@elydiocese.org

Sam Reeder - DAC Administrator

Telephone 01353 652718 or email sam.reeder@elydiocese.org

James Ryder - Church Buildings Adviser

Telephone 01353 652705 or email james.ryder@elydiocese.org

Sacha Watson – Net Zero Carbon Officer

Telephone 07301 29856 or email sacha.watson@elydiocese.org

Holly Robinson - Historic Church Buildings Support Officer – (grants and most other matters)

Telephone 07948 350211 / 01353 652720 or email holly.robinson@elydiocese.org

Samuel Pedlar – Church and Community Support Advisor

Telephone 07539 916607 or email samuel.pedlar@elydiocese.org

APPENDIX

Criteria for appointing a suitable person to the role of Inspector

The Church Buildings Council (CBC) have advised that Inspectors who meet the following criteria would be classed as being 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

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

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

Major Parish Churches:

- These are designated by the CBC - there are only a limited number of these within the diocese.
- 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;
- 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.

It would also 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.

Accreditation

*Relevant accreditation in the above criteria would mean that the prospective Professional adviser is on one of the following Conservation Accreditation Registers:

For Architects

AABC at the category A - www.aabc-register.co.uk/

RIBA at Specialist Conservation Architect level - www.architecture.com/working-with-an-architect/conservation-register

For Chartered Building Surveyors:

RICS (<https://www.rics.org/uk/surveying-profession/careerprogression/accreditations/building-conservation-accreditation/>)

CIOB Building Conservation Certification Scheme as Practitioners at Certified Level
www.ciob.org/Your-Career/ciob-building-conservation-certification-scheme

For Chartered Architectural Technologists

Listed on the [RICS Building Conservation Accreditation Register](http://RICSBuildingConservationAccreditationRegister)
<https://architecturaltechnology.com/find-a-practice/find-an-accredited-conservationist.html>

In some cases, a Chartered Engineer, Chartered Landscape Architect or other historic landscape specialist will be the appropriate lead professional.

The PCC should check the appropriate register.

Procurement Rules

Small projects

Small professional appointments worth up to £10,000 are unlikely to need to go through a tender process. One written quotation should be obtained on the basis of an open and transparent process which clearly states the criteria (where applicable) upon which the contract will be awarded.

Medium Projects

For professional appointments worth between £10,000 and £50,000 (excluding VAT), you must get at least three competitive quotes/tenders. Evidence of the process, the quotes/tenders received, and the decision made should be recorded in case evidence is required at a later date.

Major Projects

For professional appointments with fees in excess of £50,000 (excluding VAT), you must provide proof of competitive tendering procedures in the form of a report on the tenders received together with your decision on which to accept. When you don't select the lowest tender, you will need to give full reasons.

The procurement process should include advertising the opportunity for expressions of interest in the work.

The advertisement will need to contain:

- Details of the proposed procurement process, in other words, whether a single or two-stage process is being adopted (subject to the estimated value of the project). A two-stage

procurement process includes a separate pre-qualification stage which clearly sets out the number of suitably experienced candidates who will be invited to tender and outlines how the shortlist will be chosen.

- Details of the proposed selection and award criteria, for example price only, or quality and price.

Tenders must be sought on the basis of an open and transparent process. It should be made clear to bidders in the invitation to tender documentation what criteria and weightings will be applied when evaluating bids and awarding the contract. Also, if requested, feedback to the unsuccessful candidates should be provided.

Aggregation and Your Project

Please note that the procurement legislation applies to appointments of professional advisers where it is expected that they will work on several phases of work to the same building/heritage site **within a period of five years**. This is called aggregation. So, where you expect several phases, you should add up the total value of fees for advisers of the same discipline (for example, architect) for the whole five-year period to find out which threshold applies. Where the expected value of fees is just below a threshold, you may want to follow the process for that threshold in case the cost does increase.

Further Information

CBC: Churchcare – Procurement

<https://www.churchofengland.org/resources/churchcare/procurement>

Historic England – Appointing Professional Advisers

<https://historicengland.org.uk/advice/grants/procurement-regulations/professional-adviser-appointment/>

National Lottery Heritage Fund – Procurement good practice guidance

<https://www.heritagefund.org.uk/funding/good-practice-guidance/procurement>