

## Commissioning Quinquennial Inspection Reports



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### **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.

The legal framework is the Ecclesiastical Jurisdiction and Care of Churches Measure 2018, as amended by the Church of England (Miscellaneous Provisions) Measure 2019, referred to hereafter as “the Measure”. 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.

Schemes vary from diocese to diocese, so obtain details of your diocese's scheme from the Diocesan Advisory Committee (DAC) Secretary.

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 Record Office or equivalent.

## Appointment of a Quinquennial Inspector

The appointment of a Quinquennial Inspector is made by each PCC, and is always of an individual, not a firm. The appointment is for one inspection and report in the first place. It is important that a Quinquennial Inspector's **training, accreditation** (where necessary – see below and Appendix 2 and 3) and **experience** in building conservation is commensurate with the complexity and significance of the church building(s) in question.

The CBC offers the following criteria in this regard.

### 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 will be able to give advice on this, and will maintain a register of Inspectors currently working in the diocese. 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.

When appointing a new Quinquennial Inspector PCCs should interview at least three candidates through a formal competitive appointment process (see Appendix 2). 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. A draft letter of appointment is appended to this document.

## **Fees**

The mechanism for the payment of fees varies from diocese to diocese; in some the inspection cost is paid centrally by the Diocesan Board of Finance or by other arrangement, in others it is paid directly by the PCC. The DAC will be able to advise on arrangements within the Diocese.

If fees are paid directly by the PCC, plan ahead by putting aside money each year to cover them. The diocese may have guidelines for the fees for specific types of church, depending on complexity, size, designation (listing grade) etc. The CBC recommends the categories of churches given in the box above also in this regard. These should not be binding on either party, but may be helpful to the PCC in their negotiation with their Inspector.

Regardless of the funding arrangements, the PCC or other responsible body is the client, and should have a close working relationship with their Quinquennial Inspector.

## **Preparing for the inspection**

Before the inspection, it is useful for the PCC to have thought about the following issues:

- Agree the fee with the Quinquennial Inspector
- Agree any special access arrangements, including suitably secured and protected ladders for inspecting safely accessible roofs.
- If the right ladders are not available on site, a builder should be asked to provide them for the inspection day. Provide whatever help the Inspector will need with the ladders and ensure these are correctly secured. Use of ladders should follow current safety guidelines (see Appendix 4).
- Where the inspection is to be carried out by one Inspector, it is essential for a second person to be available on site throughout the inspection day for safety reasons and to offer assistance with ladders, hatches etc. Agree in advance with your Inspector who will be available for this role.
- For some major churches inspections may be carried out by one or more additional professionals under the direction of the lead Inspector. If more than one inspector is required, this will be covered by an appropriate fee.

- Agree any suitable equipment for inspecting high level elements, such as MEWP (Mobile Elevated Work Platform) or scaffold tower. Agree additional labour as necessary for operating access equipment. It may be most practical for the Inspector to pre-arrange this special access. The fees for doing so and hire costs remain the responsibility of the PCC and these must be agreed before the inspection.
- Unmanned Aerial Vehicles (Drones) may also be used to supplement the visual inspection if legally and properly supervised with appropriately trained and certificated personnel and permissions, including from neighbours as necessary.
- Access to roofs for the inspection also gives a good opportunity for the gutters to be cleaned, but do not expect your Inspector to do this.
- Keys should be readily available for all parts of the building normally kept locked.
- Bells should be down on the day of the inspection. The ringers should be asked to report on any problems with the ring.
- Keep your Inspector up to date with any initiatives in relation to energy saving and other environmental issues.
- Agree with your Inspector whether they would like the heating system to be on or off, or whether it makes no difference. (If they intend taking pictures with a thermal imaging camera, the heating generally needs to be up to temperature.)

### **Complementary reports and tests**

It is sensible for these reports or tests to be done before the Quinquennial Inspector's inspection, so the results can be included in the main report. All such reports should be provided in advance of the visit by the PCC to the Inspector.

- all recent specialist reports, including a Statement of Significance and/or Conservation Management Plan if such exist.
- all recent written test reports on asbestos and the heating, electrical, fire protection and lightning systems.
- arboricultural and ecological reports (eg, bats or other protected or rare species).
- the Church Log Book and Inventory.
- Energy Audit, Eco Church Survey, or other environmental report, if applicable.

### **The survey and report**

The report can be written to a simple standard template found on ChurchCare, which is also available for online compilation on the Church Heritage Record. This means you can never misplace it, and the DAC can ensure it is up to date and to an acceptable standard, and suggest improvements if necessary.

The Quinquennial Inspection Report shall include:

- reference to previous Quinquennial Inspection reports, which are deemed to form part of subsequent reports, these to be provided by the PCC to the Inspector
- photographs of the exterior and the interior of the building (at least one looking east, one looking west), and illustrating particular areas of concern, marked up as appropriate
- a simple plan of the building, annotated and cross-referenced with photographs as necessary

The survey carried out by your Quinquennial Inspector will cover:

- any necessary repair of the building
- maintenance deficits and maintenance plans
- safety of the structure and floors
- access issues
- environmental sustainability (eg lighting, heating, rainwater goods, suitability for renewables, opportunities to reduce heat loss through steps such as draught-proofing and insulation)
- trees in the churchyard if they are protected by a Tree Preservation Order, in a Conservation Area, or on the Gazetteer of ancient, veteran and notable trees; or any tree impacting on the building
- ruined structures in the churchyard
- moveable items of high value or significance (which may be identified in the Statement of Significance and/or by the Archdeacon)
- the risk of impact of a changing climate on flood-risk, rainwater goods, and stonework.

The inspector should use their professional judgement in bringing other matters of concern to the attention of the PCC, for example if the safety of boilers and heated water systems (ie Legionnaires disease) has been guaranteed by regular checks, paths, public rights of way, utilities, serious issues concerning the boundary walls, lych-gates and other structures within the curtilage, and monuments.

The inspection will generally be carried out from ground level. If the Inspector makes use of specialist equipment (for example Unmanned Aerial Vehicles) depending on agreement, this will carry an extra charge. The quinquennial system assumes that the Inspector will inspect all parts of the building such as internal and external roofs where these are visible and safely accessible. It will state any limitations of the survey, such as

areas where it was not possible to gain access, and make recommendations for any further investigation.

The report will be read and needs to be understood by people without technical knowledge, so the analysis and language should be as accessible as possible. The report should be logically structured and cover the aspects described above. Photographs and plans can either be included within the text, or set out in an Appendix as in the CBC Template.

In the context of the General Synod motion of February 2020, recognising the climate emergency and calling on all parts of the church to make year on year reductions in emissions, achieving “net zero” by 2030, the inspector should use their professional judgement to highlight ways to reduce the energy used in running the church building. This may be by repairing/improving the fabric, by changing the church heating & lighting systems, or by generating electricity through renewables.

### **Follow-up**

When the report is received, it is important for the incumbent, churchwardens and PCC to agree and sign off the report, and understand its recommendations. The report is designed to be a thorough and complete assessment of the condition of the building, and can therefore be a lengthy document. It is very useful for the PCC to walk round the building going through the recommendations. The Quinquennial Inspector should be willing to meet the PCC to go through the recommendations.

Each part of the building is described and an assessment given of the repair needs. Where action is needed, the report gives this on a scale from 1 to 5 according to the urgency of the repair:

- 1 - Urgent, requiring immediate attention
- 2 - Requires attention within 12 months
- 3 - Requires attention within the next 12 - 24 months
- 4 - Requires attention within the quinquennial period
- 5 - A desirable improvement with no timescale

Any items under category 1 are urgent repair needs of the building or necessary for the safety of its users. The Inspector is likely to mention these at the time of the inspection and give guidance on how the problems can be addressed.

The report is **neither a specification for works nor a costing**, although it should give an estimate of likely costs within broad bands, as shown below and in the CBC template.

The bands are Cost Band 1 – £0-1,999; 2 – £2,000-9,999; 3 – £10-29,999; 4 – 30,000-£49,999; 5 – £50,000-249,999; 6 - £250,000 or more than this. For advice on what this means in terms of procurement, see below.

Most repair items will require advice either from the Quinquennial Inspector or a relevant professional of comparable experience, and for larger repair works a Quantity Surveyor (QS) may need to be consulted.

## **Procurement and permission for subsequent repair works**

Once the PCC is able to put the identified works in hand, it is normal practice to instruct the Quinquennial Inspector or another suitably able professional, through a separate contract, to prepare a specification and seek tenders from builders of suitable experience.

PCCs should be aware that if public money is involved, procurement rules will apply, meaning that tendering may be required; see ChurchCare for the CBC guidance note on this. Tendering is normally required for professional fees where over £10,000 for the fees comes from the public purse (including National Lottery Heritage Fund grants).

As already noted, such tendering may not be required if your Quinquennial Inspector has been appointed or re-appointed within the last 5 years through a formal competitive process.

The implementation of all items within the report will require **a faculty**, except those that are identified in the report as items of routine maintenance (including repairs) which fall under **Lists A or B** as set out in Schedule 1 of the Faculty Rules 2015 (as amended by the Faculty Jurisdiction (Amendment) Rules 2019). The report must therefore identify which works are within this category. If still in doubt in this matter after discussion with your Quinquennial Inspector, contact your DAC Secretary.



## **Appendix 1:**

### **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 2019

(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 log book 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 section 1A of the Inspection of Churches Measure 1955 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 change 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](http://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

## Appendix 2: 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 filled in form should be sent to the DAC for their input.

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)		
4 (name)		

\*For details of professional accreditation schemes relevant to this role, see Appendix 3, ask your DAC and 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 1: (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) <b>including relevant experience of environmental matters</b>	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:

## 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 2: (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) <b>including relevant experience of environmental matters</b>	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:

## 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 3: (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) <b>including relevant experience of environmental matters</b>	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 3: Accreditation of professionals**

There are several accreditation schemes, some of which have different levels; PCCs should ascertain themselves of which appropriate schemes the professional is a member, and at which level; their DAC can be of help to them in this regard. Historic England recently published a protocol which sets out the criteria for their recognition of such schemes, which is given in full here:

#### **Requirement by the UK Home Countries Heritage Bodies for the lead professional role on their repair grant schemes to have conservation accreditation**

Department for Communities Northern Ireland, Historic Environment Service (Cadw), Historic England and Historic Environment Scotland support the requirement for an applicant for their repair grants to employ a lead professional advisor with relevant specialist conservation knowledge, ability and experience.

The lead professional advisor is required to deliver a range of services relating to repair grants which are described in the grant application information. These include analysis of condition, investigations, planning and specifying the work, and inspecting and certifying the work while it is in progress and after it is completed.

To be recognised as eligible to be the lead professional advisor on their repair grants an individual needs to satisfy the UK Home Countries Heritage Bodies that their professional training and competences will enable the delivery of the services required of the lead professional in their grant schemes.

Their conservation accreditation scheme meets the following criteria:

- Accreditation of individuals rather than companies or practices
- Schemes should be open to all suitably qualified and experienced members of the relevant professional disciplines
- Assessment of a verifiable record of work carried out demonstrating experience and competence
- Assessment by suitably experienced, impartial assessors against agreed criteria together with reassessment on a regular basis
- The use of the ICOMOS Guidelines for Education and Training in the Conservation of Monuments, Ensembles and Sites
- An ethical and linked disciplinary framework to ensure that standards are observed and maintained

Historic England and Historic Environment Scotland both operate this requirement on their repair grants. Cadw will introduce the requirement from January 2018. From April 2017, the Historic Environment Division of the Northern Ireland Department for Communities will have the same requirement for proposals seeking support of £10,000 or more from its Historic Environment Fund.

### **Background**

Conservation accreditation schemes for professionals are developed and operated by professional bodies and independent organisations. Each scheme has its own application and assessment process. Becoming accredited involves submitting evidence of an individual's experience and competence, which is assessed by suitably experienced and impartial assessors. Most schemes use the International Council on Monuments and Sites' (ICOMOS) Guidelines for Education and Training in the Conservation of Monuments, Ensembles and Sites as the basis for their assessment of candidates' experience. However, the schemes vary in their entry and re-accreditation requirements.

December 2016

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

#### **Appendix 4: Health & Safety - Working at Height**

Use of ladders for access for inspection should comply with the Work at Height Regulations 2005. Guidance for this is published by the HSE and includes Safe Use of Ladders and Stepladders and Working at Height: A Brief Guide. This applies not only for the Quinquennial Inspection but also for routine maintenance.

For further advice regarding the safety of those involved in routine maintenance of churches, refer to the ChurchCare website.

Selected key points are included here as follows:

- It is strongly recommended that nobody - this includes your professional adviser and church wardens - should climb vertical ladders over 3m in height.
- All ladders must be sound safe and securely fixed. 'Footing' of ladders by a second person is considered a last resort.
- Hatches should have counterweights.
- There should be ladder extensions of about 1m or handholds beyond the plane of the hatch to assist in getting on and off the ladder.