

02/11 Selection of Quinquennial Inspectors

For advice about quinquennial inspections generally please see the relevant handbook section.

1. General

1.1 A quinquennial inspector (QI) is a professional appointed by the circuit or the local church, to undertake quinquennial inspections (QQ) as set out in standing orders

1.2 The QI is normally appointed by the circuit, or the district for district property. Any appointment needs to be confirmed in writing (see below) and recorded in the relevant minutes.

1.3 SOs require a QQ for all Methodist trust property, which includes not only churches, but also manses, caretakers accommodation, graveyards etc, unless excepted by SO 952(4)

1.4 The QI should be able to advise on other repairs, surveys or building schemes for that church or circuit, with a separate appointment to agree the appropriate services and fee.

1.5 This is important if the QI has been appointed by the circuit, but is advising on a scheme for a local church.

1.6 The QI may be a practice or an individual. Some denominations (eg Anglicans) require the QI to be a named individual, but Methodist SOs do not require this.

2. Suitable professionals

2.1 A suitable professional would normally be an architect or chartered building surveyor; a structural engineer or non-chartered surveyor (there are many types of surveyor) may be a suitable alternative. A builder is not normally suitable (in part, because they will not normally carry professional indemnity insurance). There is also an advantage in employing a professional who has carried out church inspections on previous occasion, for the Connexion or for the local Diocese.

2.2 The title “architect” is protected in law to those on the register of the Architects Registration Board; many architects are also members of the RIBA (Royal Institute of British Architects).

2.3 A “chartered surveyor” is a member (or fellow, etc, as appropriate) of the RICS (Royal Institution of Chartered Surveyors). The word “surveyor” has, strictly speaking, no legal or professional significance.

3. Basis of selection process

- Direct invitation to one individual
- Limited competition (where three or four practices are invited to make a proposal)
- Open competition (through advertisement in (eg) a local paper)

3.1 If the circuit is satisfied with the existing QI, then a direct invitation to continue may be the best option, but otherwise competition is the most appropriate way to proceed in line with procurement guidelines.

4 Considerations

4.1 When making a selection, great care must be taken to ensure that like is compared to like. For instance, it cannot be expected that a national (or international) practice based in a major city would be able to quote a similar fee to that of a sole practitioner in a rural location; additionally, a sole practitioner may not need to charge VAT. If the size and scale of the church or other property is sufficient to merit the appointment of a QI who is able to offer the expertise of a large practice, then a sole practitioner will not be suitable.

4.2 If the building is listed, in a conservation area, or of historic or heritage importance, the necessity to have regular inspections by architects and surveyors who specialise in the conservation and repair of such buildings cannot be over-emphasised. Historic and 'traditional' structures deteriorate in a manner that is very different from modern buildings and it takes a specialist to correctly distinguish defects that require attention from the superficial results of the ageing process. Also, not selecting an appropriate appointment can affect your ability to attract grants and other funds. English Heritage and the Heritage Lottery Fund state that "not all architects or chartered building surveyors have the appropriate experience in historic buildings", and the employment of ‘appropriate’ professionals is often stipulated as one of the standard conditions of grant aid.

5 Locality

5.1 The QI should normally be based in the local area, because it is important to be familiar with the history and character of that locality. You should take advantage of their expertise to ask for occasional visits to advise of potential problems. QIs who are based a long way from the church concerned are rarely able to offer a satisfactory service.

6 Professional Indemnity Insurance (PII)

6.1 PII is a very complex subject, but essentially it is an insurance policy to cover a claim in the event of defective design (and certain other areas).

6.2 Architects, and all surveyors who are members of the RICS, should have PII, but some builders, designers, technicians and draughtsmen may not. Lack of PII can mean much lower fee quotes, but is unwise and cannot be recommended. A common recommendation for the level of PII required is a minimum of £250,000 'each and every claim' basis.

7 Time scale for submission

7.1 Information sent to each practice should include a date (and address) for return of the submission. At least three weeks should be allowed – asking for replies within a week is unreasonable and may result in no replies at all. The information you are requesting can take some time to compile, particularly if visits are needed, and many practices will have to fit this into an already busy timetable.

8 General Points

8.1 You may be embarking on a long-term relationship with your architect or surveyor – changing a QI every five years is not a good way to proceed. So your documentation should stress that you are looking for a 15 to 20 year commitment. This reemphasises the need to avoid a submission based just on lowest cost.

8.2 The Anglican system, which has been in place since 1955, has worked on the basis that the QI should be offered the opportunity to be appointed advisor for any subsequent scheme at the building. This system works on the basis that there will be a lower charge for a QQ, because the costs will be covered by fees on a larger project. This is obviously a crucial aspect, and the trustees need to be very clear about whether it is proposing such a system. A practice which is not offered any other work may charge a higher fee for a QQ.

8.3 It is important to build a relationship with your QI, by keeping in touch from time to time – not just a brief request coming out of the blue once every five years! Discuss any property problems with them – a brief annual discussion can be worthwhile, perhaps before completing the schedule A.

9 The decision

9.1 The principle of ‘best value’ should be applied as opposed to just taking the lowest cost submission. In any event, you may find it is impossible to directly compare monetary costs. Try instead to look at the previous experience of the practice concerned, their references, and whether they are sympathetic to Methodist aims. The decision should be confirmed in writing, and recorded in the church/circuit minutes.

10 Likely costs

10.1 There has been much discussion about how QQs should be costed. Particular points to bear in mind are:

- Considerably more work is involved the first time that a QQ is prepared, than in subsequent ones – another reason why continuity is important.
- The time spent on, and therefore the fee for, a report on a large, Victorian, city centre church, will be much higher than for a simple village chapel.
- A listed building will require much more careful analysis than an unlisted one.
- Remember that the submission process in itself is expensive: even a small practice has to charge its partners’ time at around £100 per hour, and possibly much more. Preparation of submission documents, a church visit, and an evening meeting will probably amount to a minimum cost of £500 for the practice concerned, none of which will be directly recoverable.
- A good working relationship and quality advice are sure to outweigh any possible saving made on a “lowest cost” basis. It is vital that a note confirming that the decision will not be made on the basis of lowest cost is included in information sent to the various practices (see typical letter of invitation in the appendix below).

11 The report

11.1 The Managing Trustees should ask for the report to be submitted in a particular format which is consistent for all churches inspected. This has advantages since the QI will be familiar with the structure of the report and improves on the current, somewhat haphazard, systems of reporting (occasionally of little value to the Managing Trustees). The format for the report is discussed within ‘Quinquennial Inspections’ and samples are included there as an appendix.

12. References

12.1 Please see further information on the Methodist web site:

<http://www.methodist.org.uk/ministers-and-office-holders/property/handbook>

12.2 The following organisations can provide a list of architects or surveyors who undertake QQs and church work, and who are based in your area:

Royal Institute of British Architects: 66 Portland Place, London W1B 1AD. The client's advisory service can help with enquiries about finding an architect: tel 020 7307 3681, www.architecture.com.

For an architect skilled in conservation work on older or listed buildings try the Register of *Architects Accredited in Building Conservation (AABC)*: www.aabc-register.co.uk.

For a chartered surveyor, contact the RICS: *Royal Institution of Chartered Surveyors*, 12 Great George Street, Parliament Square, London SW1P 3AD, tel 020 7222 7000, www.rics.org

The RIBA, RICS and other professional institutions all publish guidelines on appointing professionals.

Contacts:

The Support Services Cluster
Facilities and Property Coordinator (London). Tel: 0207 467 5190
Conservation Officer (Manchester). Tel: 0161 235 6739
Registered charity no 1132208

Appendix.

Suggested letter of invitation for appointment of quinquennial inspectors:

From: circuit/local church
To: name of practice

We are pleased to be able to invite you to make a submission for carrying out quinquennial inspections at the following properties:

Name(s) of properties: *(church, manse, graveyard or other property)*

Date for return of your submission: *(at least 3 weeks from date of this letter).*

(To be submitted in an envelope marked "QI submission – not to be opened until [date of meeting]").

Name and address for return...

We enclose:

- A copy of the most recent quinquennial for each property
- Addresses of each local church/manse/other property
- Names, phone nos, emails etc of circuit officers *(or a copy of the circuit directory)*
- A note of repairs or building work carried out in the last few years, and anticipated in a few years' time *(this could be a copy of schedule A or extracts from the property log-book).*

Visit to properties:

You are invited to visit the properties involved - please contact *(name)* to agree a suitable time.

With your submission, please enclose:

- two references from clients
- a typical example of a Quinquennial Report previously undertaken by your practice
- The person within your practice who will be the "lead person" for Methodist work
- Experience of work on historic or listed buildings *(if relevant)*

Presentation:

(If applicable) You are invited to make short presentation to circuit officers on *(date, location, etc)*.

Please confirm if you wish to attend.

Fees:

- The appointment will be made on the basis of the quality of your work and the overall assessment of your submission, **not** on the basis of lowest cost.

- Please enclose a note setting out your lump-sum fee for for each of the properties concerned, and also your time-charge rates.
- A note of your anticipated expenses (*or: expenses will not be allowable*)

Please note that more than one practice may be appointed. It is hoped that this circuit and your practice will be able to develop a long-term relationship spanning many years. It is anticipated that future repairs and building schemes for these properties will be discussed with you, with the possibility of appointing you as professional consultant.

We look forward to receiving your submission. Please contact us should there be any points you would like to discuss further.

Signed by XXX, trustee, on behalf of XXX circuit or church council