

## EMPLOYING PROFESSIONALS FOR CHURCH PROJECTS

### A GUIDANCE NOTE FOR PARISHES

#### Introduction

The methods of construction and the building materials used in historic buildings are often very different from those used in modern buildings. It is therefore important to ensure that any works to them are carried out in a sympathetic manner that respects their age. Choosing the right professional for the right job is part of this process.

This guidance note is divided into several sections. Section 1 looks at the types of building professionals you may need for a church building project and gives a brief overview of what they do, the professional or trade body they belong to and whether it has a separate conservation-accreditation scheme. Not all the professionals need conservation accreditation to work on a church project, it depends on what their role is within the overall scheme of work. For example, you may need an archaeologist to perform a watching brief if any excavation work is required in the churchyard. This would not require them to be conservation accredited. Section 2 discusses the advantages of using professionals and Section 3 looks at appointing a lead professional for a project. Section 4 lists a few general considerations to think about. There is also information on the common types of contract you may encounter and guidance for procuring quotations and tenders in the appendices.

#### I. What professionals are out there and what do they do?<sup>1</sup>

Many building professionals are trained and experienced only in modern building methods and are therefore less well qualified to identify the causes of problems or to specify appropriate and cost effective repairs to historic buildings. It is therefore important to choose someone who has the knowledge and experience necessary to work on historic buildings as they will be aware of the problems and pitfalls associated with such work.

One way of ensuring building professionals have the right set of skills and expertise required for working with older and historic buildings, is for them to gain conservation accreditation to prove their competence. It also demonstrates to grant-funding bodies, clients and employers that they have been independently assessed and are considered to have a high level of skill and experience in building conservation, within their own professional discipline.

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<sup>1</sup> The advice in this section is taken from Historic England's website regarding conservation accreditation which can be found on their website at: [www.historicengland.org.uk](http://www.historicengland.org.uk).

In turn, these schemes and their registers of conservation-accredited individuals enables those looking to commission work on historic buildings to find professionals with the specific skills and experience required, encompassing all aspects of historic building conservation, repair and maintenance.

The accreditation schemes 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 experience and competence, which is assessed by suitably experienced, impartial assessors.

Depending on the size, complexity and nature of your particular building project you may consider using any of the professionals listed in the following sections. Part (a) lists those whose professional body has a conservation accreditation scheme and Part (b) lists those who you may still need for a building project, but who would not necessarily be conservation accredited or belong to a professional body.

## **(a) Professionals with conservation accreditation schemes<sup>2</sup>**

### **Architects**

All qualified architects are registered with the *Architects Registration Board*<sup>3</sup> (ARB), regardless of whether they also belong to the *Royal Institute of British Architects*<sup>4</sup> (RIBA), which is the professional body that represents many of them. The term 'architect' is a protected title in the UK, so only those who are registered with the ARB can call themselves an 'architect'. Professionals who adopt similar titles such as *Architectural Designer* do not have the same professional qualifications needed to be an architect.

Architects are trained in design, and those who specialise in old buildings can bring their expertise to the design of refurbishments, alterations and extensions, as well as designing new buildings in historic areas.

There are more than 30,000 architects registered in the UK but only a small proportion specialise in the conservation and repair of old buildings. Architects with recognised conservation accreditation can be found at the *Register of Architects Accredited in Building Conservation*<sup>5</sup> (AABC) or the *RIBA Conservation Architect Register*<sup>6</sup>.

### **Building Surveyors**

Building surveyors have a similar role to an architect in relation to repairing and maintaining existing buildings, but are generally not trained as designers.

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<sup>2</sup> The advice in this section is taken from Historic England's website regarding finding professional help, which can be found on their website at: [www.historicengland.org.uk](http://www.historicengland.org.uk).

<sup>3</sup> [www.architects-register.org.uk](http://www.architects-register.org.uk).

<sup>4</sup> [www.architecture.com](http://www.architecture.com).

<sup>5</sup> [www.aabc-register.co.uk](http://www.aabc-register.co.uk).

<sup>6</sup> [www.architecture.com](http://www.architecture.com).

The main professional body for building surveyors is the *Royal Institute of Chartered Surveyors*<sup>7</sup> (RICS). Like architects, only a small proportion of building surveyors specialise in the conservation and repair of old buildings. Those that do can be found on the *RICS Building Conservation Accreditation Register*<sup>8</sup>.

### **Conservation Professionals**

Conservation professionals are specialists in heritage matters who can help you manage, care for and conserve your historic building. Their particular concern is to ensure that any work respects heritage values, historic features and specialist construction techniques. They will be able to give you technical advice about building materials and repairs and issues such as extensions and alterations to historic buildings.

Conservation professionals can come from a wide variety of disciplines, but should be accredited as full members of the *Institute of Historic Building Conservation*<sup>9</sup> (IHBC), and have the letters IHBC after their name. Most local authority Conservation Officers are members of the IHBC, in addition to other conservation professionals like architects, building surveyors and archaeologists. The IHBC provides a searchable list of businesses that work to conservation and service standards set by the IHBC at its *Historic Environment Service Providers Recognition*<sup>10</sup> (HESPR) website. Its national office can also guide you towards the relevant accredited members.

### **Architectural Technologists**

Architectural Technologists are concerned primarily with the sound technical performance of buildings. They are specialists in building design and construction and can initiate and complete a building project from conception through to final certification. Like architects and building surveyors, they have their own professional body, the *Chartered Institute of Architectural Technologists*<sup>11</sup> (CIAT). Only a small proportion of architectural technologists specialise in the conservation and repair of old buildings and those that do can be found on the *CIAT-Accredited Conservationist Register*<sup>12</sup>.

### **Structural Engineers**

Structural problems are usually best assessed by a structural engineer. Their primary role is to examine the condition and defects of an existing structure, although they are often consulted about the structural integrity of proposed works such as extensions and new builds. Again, it is best to find an engineer who is experienced with historic buildings. The the *Institution of Structural Engineers*<sup>13</sup> (IStrucE) and the *Institution of Civil Engineers*<sup>14</sup> (ICE) have

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<sup>7</sup> [www.rics.org](http://www.rics.org).

<sup>8</sup> [www.rics.org](http://www.rics.org).

<sup>9</sup> [www.ihbc.org.uk](http://www.ihbc.org.uk).

<sup>10</sup> [www.ihbc.org.uk](http://www.ihbc.org.uk).

<sup>11</sup> [www.ciat.org.uk](http://www.ciat.org.uk).

<sup>12</sup> [www.ciat.org.uk](http://www.ciat.org.uk).

<sup>13</sup> [www.istructe.org](http://www.istructe.org).

<sup>14</sup> [www.ice.org.uk](http://www.ice.org.uk).

engineers accredited in building conservation, and these are listed on the *Conservation Accreditation Register for Engineers* (CARE), which is administered by ICE<sup>15</sup>.

## **Conservators**

Conservators are experts in the conservation, repair and preservation of materials and objects, such as wall paintings, statues and stained glass. They can also carry out surveys of historic materials and objects, and make recommendations for their repair. The *Institute of Conservation*<sup>16</sup> (ICON) has a *Conservation Register* specifically for historic properties and places of worship which lists conservators with specific skills.

## **(b) Professionals without conservation accreditation schemes**

### **Building Services Engineers**

Building services engineers are used for the installation and maintenance of a variety of different operational systems used in modern and historic buildings. These can be things like heating, lighting, plumbing, electrics, ventilation, air conditioning and fire prevention systems. The *Chartered Institute of Building Services Engineers*<sup>17</sup> (CIBSE) maintains a *Directory of Practices and Firms* which is a searchable database of their members.

### **Project Managers**

Project managers are often appointed to co-ordinate a team of professionals or act as lead consultant on a large project. They can come from a variety of backgrounds including architects, building surveyors and engineers. Who you employ as a project manager will be largely dictated by the type of project you are undertaking. There is an *Association for Project Management*<sup>18</sup>, although it is not a requirement for anyone running a project to become a member.

Some of the larger grant schemes, such as the Heritage Lottery Fund, may have specific conditions that apply when employing a project manager eg. they must be a conservation accredited architect. Always check with the grant scheme you are applying to whether this is the case before you start appointing any professionals for your project.

### **Archaeologists**

Archaeologists study the past through its physical remains, which in turn contributes to our understanding of the historic environment. You may need the services of an archaeologist when carrying out below ground work in a churchyard to ensure no damage is done to hidden remains (like buildings or burials) or to record their presence. This is known as a watching brief and may be required as part of planning permission or a condition of a grant

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<sup>15</sup> [www.ice.org.uk](http://www.ice.org.uk).

<sup>16</sup> [www.icon.org.uk](http://www.icon.org.uk).

<sup>17</sup> [www.cibse.org](http://www.cibse.org).

<sup>18</sup> [www.apm.org.uk](http://www.apm.org.uk).

award. In rare cases you may need an archaeologist to produce a mitigation report if any remains need to be removed or to produce a standing buildings survey if any demolition is required. Most professional archaeologists are members of the *Chartered Institute for Archaeologists*<sup>19</sup> (ClfA), who ensure its members are professionally accredited and skilled in the study and care of the historic environment. They have searchable directory of member organisations.

## **Ecologists**

Ecologists conduct surveys to identify, record and monitor species and their habitats. Their services may be required on a building project to ensure that no harm comes to the wildlife (plants and animals) when work is in progress, or to produce a survey and report documenting the important species (eg. bats, newts, flowers, fungi, lichens, etc) in a church or churchyard. In rare cases you may need an ecologist to produce a mitigation report if any plants or animals need to be moved to new areas or as a condition of planning permission or a grant award. Most professional ecologists are members of the *Chartered Institute of Ecology and Environmental Management*<sup>20</sup> (CIEEM) which ensures their members are suitably qualified and have the appropriate training and licenses to work with a variety of plants and animals. They have a searchable directory where you can find members who specialise in different species and habitats, and/or who hold specific licenses.

## **Builders/Contractors**

It is worth spending just as much time choosing a builder as a professional adviser. If you have appointed an architect or surveyor, they should be able to find a suitable builder for you. However, if you are not employing a professional adviser for the works, it is important to find a builder with experience and knowledge of work to historic buildings. Ask around, check references, go and look at other jobs that the builder has completed.

If you're seeking advice from a builder on what work is needed, be aware that they have a vested interest in how much work there is to do. If you think a builder may be proposing unnecessary work, you should seek independent professional advice.

Many elements of historic buildings are quite fragile and require specialist expertise when considering a repair rather than the skills of a general builder. Such work may include the cleaning and re-pointing of stonework, repairs to stained glass windows or the installation of special services.

Some builders may belong to a trade association such as the *Federation of Master Builders*<sup>21</sup> or the *National Federation of Builders*<sup>22</sup>. In addition, the *TrustMark*<sup>23</sup> scheme is supported by the government, consumer groups and the building industry to help people find reputable firms to carry out repairs, maintenance and improvement works. Members of these schemes are

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<sup>19</sup> [www.archaeologists.net](http://www.archaeologists.net).

<sup>20</sup> [www.cieem.net](http://www.cieem.net).

<sup>21</sup> [www.fmb.org.uk](http://www.fmb.org.uk).

<sup>22</sup> [www.builders.org.uk](http://www.builders.org.uk).

<sup>23</sup> [www.trustmark.org.uk](http://www.trustmark.org.uk).

usually required to fulfil certain acceptance criteria and/or sign up to a code of practice. However, they are not as rigorously vetted as the professional bodies mentioned earlier. They also do not have conservation accreditation schemes.

## **2. The advantages of using professionals**

A professional should steer you away from carrying out unnecessary or inappropriate work to a historic building. Professionals who have experience of older properties should be able to suggest cost-effective and well-designed solutions to any problems you may encounter.

There are a number of tasks that are often best dealt with by professionals such as architects or surveyors.

These include:

- Writing specifications that detail what works are to be undertaken, which materials are to be used and what standards should be used in the construction
- Obtaining consents such as listed building consent, planning permission and building regulations approval
- Finding suitable builders/contractors
- Tendering works and deciding on a contract
- Inspecting the building work and administering the contract

If you decide not to employ a professional to prepare a specification, tender for the work or find a builder, then there are some important issues you should consider.

When having building works carried out it is always advisable to have a contract in place. One of the simplest and the most commonly used for church projects is a “Letter of Appointment” which (at the very least), should include start and finish dates, the agreed fixed price for the work, and exactly what the price does and does not include (rather than an estimate). The contract should also cover insurance issues. Other forms of standard contract are available and include those issued by RIBA, RICS or JCT. See Appendix A for more information.

Work to historic buildings can often include items that were unforeseen at the time the price was agreed, but which become apparent as work proceeds and the building is 'opened up'. Establish with the builder before starting a project how additional works will be costed and consider a contingency sum to cover unforeseen problems.

Before work starts, find out how it will be carried out and in what sequence. Also establish how the site will be run - it needs to be compliant with the Construction (Design and Management) Regulations 2015, which govern health & safety on building sites (however small). For more information see the separate Church in Wales' guidance note, *Church Building Projects & Safety*, which can be obtained by contacting the Property Department on 02920 348200 or [property@churchinwales.org.uk](mailto:property@churchinwales.org.uk).

Always keep records of all correspondence with your builder/contractor in case there are problems later. It may also be worth keeping a photographic record of the building before works starts and throughout the repair process.

### **3. Appointing lead professionals**

For most large or complicated projects involving works to a Grade I or Grade II\* listed church, or those in a conservation area or national park, it is important to use a lead professional who has extensive experience of working on historic buildings. They should also be conservation accredited. However, in special cases, conservation-accreditation will be a requirement and *not just a recommendation*.

The HLF grant criteria that lead professionals be conservation accredited is changing, so you should check with them before making an application as it may affect who you can appoint to your project.

Cadw require lead professionals to be conservation accredited for any grants above £10,000. Their criteria is as follows:

- Architects listed on the AABC Register at category 'A' or on the RIBA Conservation Register at Specialist Conservation Architect level or on the Royal Incorporation of Architects Scotland<sup>24</sup> (RIAS) at Accredited or Advanced level
- Chartered building surveyors listed on the RICS Building Conservation Accreditation Register
- Chartered architectural technologists listed in the CIAT Directory of Accredited Conservationists at Accredited level

### **4. General considerations**

When employing professionals or building contractors always do your homework first. Draw up a check-list of the types of people (professional and trade) that you think you may need for your project. Look at Section I - *What professionals are out there and what do they do?* to give you some idea of who you may need.

Most professional bodies and trade associations have member lists on their websites to make it easier for you to find a suitably qualified professional in your area. Again, most of these have already been highlighted in Section I with links to the appropriate websites.

When you have decided which professionals would be most suitable for your particular project, check what experience they have working with historic buildings. Ask them to give you examples of previous projects and then go and see their work. If possible, talk to the people who had the work done to make sure they were satisfied with the service they received.

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<sup>24</sup> [www.rias.org.uk](http://www.rias.org.uk).

If you are going to need a lead professional with conservation-accreditation, make sure their accreditation is up-to-date and at the right level for your project.

And remember - personal recommendations from other PCCs are worth their weight in gold!

## APPENDIX A – BUILDING CONTRACTS

A contract is an agreement over the terms and conditions of the services provided and is usually in the form of:

- A Letter of Appointment
- A standard contract such as those issued by RIBA, RICS or JCT.

For most straightforward building work a Letter of Appointment is usually sufficient. This is the “contract” between you and your professional advisor or building contractor. This type of contract is most appropriate for low-cost projects or those where only a single building contractor is being used. Examples can include: installing a new heating or lighting system, partial or full re-wiring of a church, installation of new drainage or even a high-cost project where only one building contractor is involved such as re-roofing a church.

The Letter of Appointment should detail the total cost of the project, the schedule of work and the timescale. If it is a high-cost project you may want to consider including provision for staged payments so that your building contractor does not receive a lump sum up-front for the work – in this way you have some leverage if things should go wrong. **Always** make sure you keep records of any correspondence between you and your building contractor or professional advisor, **especially** if you are asking for additional work that was not in the original letter. Additional work must be agreed in writing before it is carried out.

Standard contracts, such as those issued by RIBA, RICS and JCT would normally only be used for extensive high-cost projects where a number of different tradespeople or building contractors are carrying out the work. An example of this type of project might include the conversion of part of a church into a multi-functional space that would require new building work, re-wiring, the installation of a kitchen and meeting rooms. You would also need the services of a professional advisor or project manager to run the project.

For this type of project, the contracts would normally be between (a) the PCC and the architect and (b) the PCC and the main building contractor (who may then sub-contract some of the work to individual tradespeople). Your professional advisor or project manager should be able to advise which type of standard contract would be most appropriate for your particular project. You must also seek advice from the Legal Department of the Church in Wales **before** signing any type of standard contract other than a simple Letter of Appointment.

Whichever type of standard contract you use (RIBA, RICS or JCT) it should include details of the stages of payment, liabilities, professional indemnity insurance, sub-contractors (if used) and disputes resolution procedures.

Most standard contracts are just that and contain a standard set of clauses that may need to be altered or deleted to suit your particular project. They are used because they are recognised across the construction industry and have been carefully worded to prevent any misunderstandings between the client and his/her professional advisor/building contractor. They are also legally binding in a court of law.

**Note:** A PCC is not a corporate body in law. Therefore, if you enter into a standard contract (as issued by RIBA, RICS or JCT) with a professional advisor or building contractor it will not be the PCC who sign it, but named individuals (usually the incumbent and wardens). This means you will need a minute or resolution stating that the named individuals are acting on behalf of the PCC and have their support. You may also need the Representative Body (RB) to co-sign the contract or give their consent as the owner of the building.

## **APPENDIX B - PROCUREMENT**

Most work should be procured by competitive tendering or quotations. This is especially important if you are in receipt of a grant. The following may help as a guide for when to seek a quotation or to tender for work and the type of agreement or contract that would be suitable.

### **I. Total Cost of Project up to £5,000**

Obtain at least 3 quotations from a suitably qualified or experienced person. This may not be necessary for work under (say) £1,000 if you have used the supplier/contractor before and are happy with their work. A simple letter itemising the costs of the project should be obtained and agreed to before the work starts.

### **2. Total Cost of Project up to £5,000 to £50,000**

You should obtain 3 quotations from reputable companies based on a schedule of work or specification. A formal Letter of Agreement detailing the total cost of the project, the schedule of work and the timescale should be signed by the PCC and the person or company carrying out the work.

A complex lower cost project may still need a formal contract - ask your professional adviser about the best form of contract to use.

### **3. Total Cost of Project above £50,000**

At least 3 formal tenders will be required from reputable companies based on a detailed specification which would normally be drawn up by an architect or building surveyor. This work would normally be done under a standard contract between the PCC and the contractor and/or the architect/building surveyor. However, as discussed in Appendix A, a formal Letter of Agreement might be more appropriate for a higher-cost project using only a single contractor.

**Note:** If in doubt about the suitability of a particular contract ask for advice from the Property Services or Legal Department of the Church in Wales.

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