**Quinquennial Inspection Report**

**Almshouse Association Template**

**Introduction**

Trustees and the charity will benefit from establishing a long term relationship or partnership with a suitable consultant to assist with all property and building matters. The Almshouse Association maintains a Panel of Consultants which can be found here <https://www.almshouses.org/panel-of-consultants/>

**1. General**

1.1 The purpose of the inspection is to provide (name of charity) almshouse charity trustees with a detailed appraisal of the condition of the building and to identify present and future repairs, in order to maintain the structure and services in perpetuity.

1.2 The inspection and report should be made by a suitably qualified architect or building surveyor. (RICS)(CIOB) Where the buildings are historic, the consultant must provide evidence of relevant training or experience in this field. (Contact local Historic Buildings Officer for recommendations or See TAA Panel of consultants if required.)

1.3 It is recommended that all buildings and structures should be the subject of a five yearly inspection and report.

**2. Procedure**

The following procedures should be addressed, in writing, prior to commencing the inspection:

2.1 Prepare a brief (below). The consultant is invited to visit the site and buildings and to assess the scope of work prior to submitting a fee proposal for conducting the inspection as outlined in the brief.

2.2 An appropriate fee, including expenses, disbursements and VAT should be provided.

2.3 A programme for completion of the inspections and presentation of the report should be agreed.

2.4 The required number of copies agreed.

2.5 Access arrangements to be by appointment with residents.

2.6 Property, buildings and structures to be included.

2.7 Records available.

2.8 Degree of descriptive text required and agreed.

2.9 Confirmation that the consultant holds current professional indemnity insurance.

**3. Brief**

3.1 The inspection is to comprise a full survey of all parts of the exterior and interior including the structure, its services, fixtures and fittings and to provide a clearly written report. With larger groups of properties it may be acceptable to survey a limited number of sample units internally, provided that these are representative of the remainder. This is less likely to be acceptable with historic properties.

The inspection will be visual, covering all levels and any accessible roofs, galleries or stagings. Wherever possible, binoculars should not be substituted for ladder access.

3.2 To recommend whether additional investigations by specialist consultants, conservators or contractors are required (e.g. electrical consultants, stonemasons etc.).

3.3 To advise whether additional means of access, exposure or opening-up is desirable.

3.4 To recommend whether monitoring of defects should be introduced.

3.5 To advise whether the stock complies with current housing fitness standards.

3.6 Consultants are asked to identify, prior to starting the inspection, all information likely to be required from the trustees e.g. copies of previous survey reports and records of repair work undertaken.

3.7 Depending on the needs of the charity and the skills of the consultant employed it may be appropriate for additional services to be carried out at the same time as the inspection. This may result in cost savings if it means that further inspections are not needed. These could include insurance reinstatement cost assessments, fire risk assessments (for common areas or offices), access audits, energy audits or the provision of Energy Performance Certificates. This list is not exhaustive and there may be other services offered or required. These services are not normally included as part of a quinquennial inspection.

3.8 This report may include identifying a priority break down of repairs and if appropriate relevant estimated costs for repair. (NB Estimates are not “quotes”)

**4. Procedures to facilitate and assist the inspection**

4.1 Arrangements to visit the property to undertake the inspection must be made by prior appointment with the scheme manager/warden or trustees’ representative.

4.2 Limited opening-up, that can be made good the same day, should be included by agreement with the trustees.

4.3 It is good practice and helpful to the consultant if the following is arranged prior to the day of the inspection:

* In order to assist the consultant’s safe access to and inspection of all parts of the building(s), trustees should provide necessary equipment
* Where possible all gutters, downpipes and gullies to have been cleared so that the consultant can make a thorough inspection
* It is desirable for an electrician to make a general test and visual inspection of the electrical installation and prepare a report, with costs of remedial work, for incorporation into consultant’s report. Alternatively, trustees could arrange for this to be done directly in parallel with appointing the consultant surveyor.

**5. Report Presentation**

5.1 The report should be presented in a clear, methodical layout with an appropriate numbering system. The report should summarise the findings and recommendations as clearly as possible.

5.2 The report should include the following:

* Schedule of buildings and structures included in the survey
* Brief description of the building(s), including any historic considerations and, if the buildings are listed, the grade of listing
* On a first inspection, to describe briefly the construction and materials of the building(s); on subsequent inspections to include only such descriptions as are essential for clarity
* Clear reference must be made to any inaccessible parts of the building e.g. high spires, towers, sealed floors, timber beam ends or roof spaces – i.e. disclaimer for professional indemnity insurance purposes
* Recommendations for further opening-up
* Recommendations for further specialist advice
* Record of works undertaken since last inspection (where available)
* Record of outstanding work from last inspection, if appropriate
* Summary of general structural condition
* Health and safety issues including any implications of the Housing Health and Safety Rating System and compliance with the government’s Decent Homes Standard
* Description of defects. Note: this section must only be a description of defects. Recommendations for repair should be kept to the appropriate section.

5.3 The detailed Report should include:

5.3.1 Exterior

* Roof structures and roof coverings
* Chimneys and high level features
* Rainwater goods
* Walls (including coats of arms)
* Doors, windows and external joinery and metalwork (including leaded glazing and stained glass where relevant)
* External paintwork
* Paving, paths, steps, ramps, drives and parking areas
* Site features: boundary walls, gates, fences, etc.
* Trees that may have an influence on the building
* Monuments
* Outbuildings
* External lighting and associated cabling.

5.3.2 Interior: To include all internal spaces. To be described room by room if subject to defects. Where common defects occur, these may be recorded in categories rather than room by room.

* Roof spaces (including access and insulation)
* Ceilings (including exposed beams)
* Walls and partitions (including lintels)
* Fireplaces and chimney breasts
* Floors
* Internal joinery (including doors and ironmongery)
* Staircases
* Fittings, including coats of arms
* Decorations
* Built-in cupboards, kitchen units and bathroom fittings (including estimated age and potential non-compliance with the Decent Homes Standard)
* Signage.

5.3.3 Services and installations:

* Electricity supply (up to meter)
* Electrical installation (including safety assessment)
* Gas supply (up to meter)
* Gas installation (including safety assessment)
* Oil installation
* Water supply and plumbing
* Hot water and heating installation
* Above ground drainage (including sanitary goods)
* Below ground drainage and disposal system (including description of method of disposal of foul and surface water)
* Lightning conductor installations (including recommended period for inspection)
* Bells and bell frames
* Security installations
* Lift installation.

5.3.4 Environmental and other issues

* Insulation and carbon reduction additions suggestions where appropriate.
* Environmental/humidity control
* Hazardous and deleterious materials (consultant to advise on the need for an asbestos survey)
* Fire safety installations (including emergency escape)
* Other health and safety concerns (noise, trips and falls, radon etc.).

5.4 Summary of recommendations for action (referenced back to the text) with approximate estimates of cost

5.4.1 Priority 1: Very urgent work requiring immediate action including health and safety issues.

5.4.2 Priority 2: Urgent work not requiring immediate action, but should be addressed and completed in year 1.

5.4.3 Priority 3: Work to be completed within 5 years.

5.4.4 Priority 4: Likely major repairs beyond 5 years.

5.4.5 Areas requiring to be monitored and method of achieving same including structural concerns.

5.4.6 Suggested improvements to the buildings.

5.4.7 Suggested improvements in routine maintenance.

5.4.8 Brief recommendations for improving the energy efficiency of the structure and services including reference to the need, or otherwise, for EPC’s (Energy Performance Certificates) to be provided to residents.

5.5 Drawings

5.5.1 Should be included where basic drawings exist. It is not intended that the consultant should provide a full measured survey. However, quick outline sketch plans may be useful for locating specific areas of concern.

5.5.2 Photographs are to be provided to illustrate important findings. These should be cross referenced to the text and may be included in an appendix or within the body of the report.