

Jedburgh Conservation Area Regeneration Scheme

GUIDANCE FOR THE APPOINTMENT OF A PROFESSIONAL AGENT

Jedburgh Conservation Area Regeneration Scheme (CARS) is a partnership project developed by Scottish Borders Council in conjunction with a community based Jedburgh CARS Steering Group, which successfully obtained funding from Historic Environment Scotland in February 2017 for a heritage led regeneration project for Jedburgh town centre.

Jedburgh CARS is focused on a range of heritage and conservation based regeneration activities within the town centre over a five year period. The scheme will offer grant aid towards repair works to traditional buildings as well as supporting complementary initiatives, such as Community Heritage Projects and Traditional Skills Training, to increase awareness and understanding of the town's rich heritage.

The project has an overall budget of just over £1million, funded by Historic Environment Scotland (£866,500) and Scottish Borders Council (£150,000) and will run until March 2022.

PROFESSIONAL AGENTS

Each applicant **MUST** appoint a suitably qualified professional agent, experienced in works to repair traditional buildings to accepted conservation standards, for any project seeking grant funding in excess of £5,000. It may also be necessary / beneficial to appoint a professional agent on projects seeking grant funding less than £5,000 however this can be discussed and agreed with the Jedburgh CARS Project Officer.

The professional agent should be appointed, as a minimum, to assess the scope of works for the project, develop relevant information (including drawings and specifications) to allow necessary applications for statutory approvals and grant funding as well as contractors to tender for the works, and oversee the project as it develops on site.

Jedburgh CARS is committed to upskilling professional agents in the care and repair of traditional buildings. Regular training events are proposed for the duration of the Jedburgh CARS project as well as potential funding for specific training courses and workshops delivered by accredited third party organisations. Further information is available from the Jedburgh CARS Project Officer.

Professional fees are eligible for Jedburgh CARS funding provided the agent belongs to a recognised professional institution, (eg. ARB for Architects, RICS for chartered surveyors etc) carries appropriate professional indemnity insurance, and can demonstrate experience in works to repair traditional buildings to accepted conservation standards. A Conservation Accredited Professional Agent must be appointed if the building is Category 'A' listed status.



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Professional fees are only eligible if the professional agent inspects work in progress and is responsible for its certification on completion.

Jedburgh CARS does not operate an approved agent scheme and will not provide potential applicants with details of professional agents. It should be noted that whilst Jedburgh CARS can provide general advice in relation to the potential works, it cannot provide specification, direction or certification services. It is the responsibility of the applicant to ensure that an appropriate professional agent is appointed. (or for grant funding less than £5,000 that necessary and appropriate information is developed and submitted with the application) .

Further information on the services of professional agents can be found on the websites of the individual professional institutions.

Should the applicant be a suitably qualified and experienced professional agent who wishes to undertake the professional work themselves, they can do so subject to the grant funding bodies' approval. The applicant's professional fees would in this case not normally be grant eligible.

PROFESSIONAL AGENT SERVICES

The following services will generally be required from a professional agent as a minimum in order to obtain funding from Jedburgh CARS:

Condition Survey

The first stage in the development of an application for CARS funding is to assess the current condition of the property and identify defects that require to be addressed to keep / return the building to good order.

Jedburgh CARS funding is focused on the structural integrity and external fabric of the property with the public face being prioritised in any grant offer however linked works are likely to be eligible for funding (ie the rear slated pitch of a main roof). Generally internal works, unless of a structural nature, will not be eligible for funding.

The condition survey can usually be undertaken visually from available safe vantage points however in some cases specialist high level access provision may be required (Cherry Picker, Scaffold etc) The hire cost of any high level access provision to assess the condition of the property can be incorporated in the CARS grant application for the repair works but will only be reimbursed if the application is successful.

Should high level access provision be required it is beneficial to request that the operative is capable of carrying out minor repairs/patching to high level fabric (Sometimes even only as a temporary measure to avoid further deterioration) and/or clearance of gutter debris provided this can be done safely during the inspection process.

Ideally a report on the fabric condition of the building should be prepared by the professional agent or, where appropriate, at least a summary of defects found and the level of urgency required to address them (Immediate, Urgent, Necessary, Desirable) This will also provide a useful list of repair/maintenance works, outwith those potentially being undertaken with CARS funding, to allow a degree of forward planning to be developed for the building fabric.

The condition survey should form part of the application for CARS funding and will be used to assist the assessment of submitted applications.



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Scope of Works

Once the condition of the property has been assessed then a list of the required repairs can be developed. This may include a description of the itemised work elements, specification of specific materials and/or repair methods, drawings and/or details, and any other information that will assist the contractor in preparing an accurate quotation to carry out the works.

The scope of works should be clear and concise to describe the proposed works with a copy submitted as part of the application for CARS funding to allow assessment of the eligibility of each element.

Reference should be made to the Jedburgh CARS General Grant Guidance Notes which contains information on the prioritisation of grant funding elements, principles for repair and eligibility criteria.

Specification for traditional repairs and standards of workmanship should be to accepted conservation standards. An explanation and details of accepted conservation standards can be found in the Historic Environment Scotland “Advisory Standards of Repair” document which is free to order or download at:

www.historicenvironment.scot

Where specification and / or workmanship are deemed to be deficient grant funding will not be offered / paid until rectified.

Tenders for the Works

At least three competitive tenders from building contractors are required for CARS grant applications seeking funding above £5,000. It is preferable that the professional agent is appointed to develop the tender information (or in conjunction with appropriate specialist consultants such as a quantity surveyor) and that they both receive and report on the submitted contractor tenders. This ensures that the contractors are all asked to price the same works and specification, that queries from contractors can be answered accurately and promptly and that the tender process is carried out in an appropriate and transparent manner in line with industry standards.

An itemised tender breakdown will be required (particularly where potential work elements may not be eligible for CARS funding but may be part of a wider contract) to allow any potential CARS grant offer to be calculated and monitored during the site works.

A contingency sum for unexpected works can be included in the submitted CARS grant application however CARS grant funding is only paid on actual costs incurred for the works up to a maximum sum therefore, where possible, accurate tender information for the works will provide greater cost certainty.

Contract Administration and Site Inspection

The appointment of a professional agent should include post contract services such as site inspections (as appropriate) and general contract administration. Whilst the Jedburgh CARS officer will monitor the works progress and workmanship in terms of the release of the CARS grant funding it is the responsibility of the professional agent for “signing off” any work on behalf of the property owners including any completion certification.

The professional agent may also assist in the preparation of CARS grant claims for the property owners either in full on the owners behalf or providing information to allow the property owners to make a claim themselves.



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Other Consultants

It may be necessary for other specialist consultants to be appointed such as a Structural Engineer, Quantity Surveyor etc. Generally the Professional Agent would advise on the need for additional consultants and the reasons why they are required.

Provided the specialist consultants are required to assist with CARS eligible works then the associated fee (or part thereof relevant to the CARS eligible element) can be incorporated in the CARS grant application for the repair works but will only be reimbursed if the application is successful.

It is the applicant's responsibility to ensure that any other specialist consultants are also suitably experienced in works to repair traditional buildings to accepted conservation standards.

CHECKLIST

The following provides a checklist of Professional Agent requirements and services to be provided to meet the eligibility criteria for Jedburgh CARS Grant Applications:

Requirements

- Membership of Professional Body
- Professional Indemnity Insurance
- Traditional Building Experience
- Conservation Accreditation (If Necessary)

Services

- Fabric Condition Survey Report
- Scope of Works / Description / Specification
- Preparation of Relevant Drawings / Details
- Tender Process Management
- Preparation of Tender Report
- CARS Grant Application Submission
- Post Contract Administration
- Carry Out Site Inspection(s)
- CARS Grant Claim Submission

For further information on Jedburgh CARS please contact:

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