



## Introduction

A DAC will be asked to advise the Chancellor on a range of matters: aesthetic, technical and pastoral. To assist with matters where specialist knowledge is necessary the DAC may have advisers in a range of disciplines, the most common being archaeology, organs, bells and clocks, while others include liturgy, stained glass, heating, lighting and landscaping. Advisers in these and other specialist areas provide an extremely valuable service to the DAC. Their position and role need to be clearly defined for the benefit of the parishes and the DAC. The purposes of these guidelines is to help DACs understand what they should expect of their advisers and to provide an example of good practice for the role of the adviser in the work of a DAC. Many of the principles are applicable to all DAC members.

Advisers have a positive role to play in the DAC advice system and their voluntary contribution is much appreciated. With careful observation of good practice they can help both parishes and DACs, and this note is intended to help that process.

In this document the term 'adviser' is used to refer to anyone appointed to advise the DAC, whether as a full member of the DAC or not. The term 'paid consultant' is used to describe for someone employed by a parish to advise them.

## Selection

The responsibility for appointing full members of the DAC lies with the Bishop's Council; the Bishop can appoint DAC advisers and the DAC can request that a particular person is appointed to serve. Advice regarding suitable candidates can be sought from the Church Buildings Council (CBC) or the amenity societies as appropriate. It is good practice to advertise when a new DAC member of adviser is sought, not least to ensure that a suitable person is not overlooked and to give confidence in the diocese that the DAC is operating in an open and transparent manner.

It is advisable for there to be a proportionate selection process before an appointment is offered. There should be written terms of reference. The length of appointment needs to be made clear at the outset, especially if the adviser is not a full member whose length of appointment is regulated by the Care of Churches Measure. It may be helpful to have a trial period for the benefit of both parties. Advisers need to understand their own remit, and how often they will be called on. Some advisers will be called on frequently, others less so.

## Status

The adviser will advise the DAC on matters related to their specialist knowledge and keep the DAC informed of aspects of petitions and requests for advice that have direct bearing on their subject area. The DAC Secretary will be the usual conduit for channelling advice. In addition, separate areas of specialist advice often have a bearing on one another, which makes it essential for the adviser to understand the context in which their advice is given and to discuss it at the meeting of the DAC. Therefore the CBC considers that it is often appropriate for advisers to be full members of the DAC, especially when their area of advice will relate to other works, for example the impact of reordering, heating and floor coverings on organs.

When an adviser is not a full member of the DAC, a protocol needs to be in place to ensure that their views are properly reported to and understood by the DAC. An adviser who is present at DAC meetings can be questioned about their advice and help ensure that the DAC realises the implications of what they are advising. Advisers may therefore be invited to attend meetings for particular cases. All should have the opportunity to attend a DAC meeting at least once a year.

It is not helpful for a DAC to approve schemes 'subject to the adviser's comments' – the comments should be before the committee when they make their recommendation. Advisers must be able to offer the necessary time. The adviser must maintain sufficient competence in their subject to give credible advice, being aware of current best practice, relevant technologies, policies and legislation. The adviser should maintain an informed and up-to-date knowledge of general conservation philosophy. It is strongly recommended that advisers should attend appropriate conferences and study days, particularly those which enable them to meet and share knowledge with other advisers and those with specialist knowledge.

The adviser should avoid protracted discussions with the parish of a detailed technical nature (this is properly the role of a paid consultant, who should carry the relevant professional insurance). The adviser should use the structures that are available to support them, including recommending, when appropriate, that the DAC refer schemes to the CBC under Part 9 of the [Faculty Jurisdiction Rules](#), if the PCC or DAC Secretary has not already done so.

## The role of the DAC adviser and the role of a consultant

The invitation for an advisory visit should always be channelled through the DAC secretariat for the benefit of the adviser (by controlling their workload) and to indicate to the parish the official nature of the visit. The primary role of an adviser is to advise the DAC. Advisers may, if they think it appropriate, give informal advice to parishes in broad terms, but it is not part of their duties to draw up detailed schemes or to recommend a particular contractor for a project.

It is not unusual to become aware of situations where the parish needs a specialist in order to prepare a suitable set of proposals for their intended project. In situations like these, the DAC adviser should never appoint themselves as adviser to the parish and prepare a scheme of work for them. A parish about to embark on a potentially costly and possibly complex scheme in need of advice should appoint a paid consultant. This will often save them money in the long run. The consultancy fee brings the benefits of the consultant's insurance as well as experience, with someone answerable for their advice in the unfortunate instance of projects not producing the expected outcome. This leaves the DAC adviser free to give advice to the DAC without being open to the accusation of approving only their own schemes or those of preferred contractors.

It is not appropriate for an adviser to become a paid consultant to a scheme that they hear of through a DAC referral. Nor is it part of the DAC adviser's role to oversee projects; that is the role of a paid consultant. However, it is appropriate for an adviser to take a discreet and constructive interest in the work, in order to learn lessons, which may be useful in the future.

It is sometimes appropriate for an adviser to provide a brief, which places the required work within the context of an overall project, and outlines the work that will be required. Advisers should not, however, give detailed specifications for schemes and expect practitioners to quote for them. It should always be made clear that the DAC adviser visits on the behalf of the DAC and at the request of the DAC. It is understandable that some advisers want to be involved in the early stages of a scheme but this should not be used as a way of giving consultancy to the parish. The DAC will need to establish its own protocol on whether advisers visit on their own or with another member of the DAC. However, advisers should always report back to the DAC, not to the parish. There will be an agreed procedure for sending the DAC's written advice to the parish.

A DAC adviser should not promote the work of particular contractors. Occasionally, it might be necessary to point out when someone is quoting for a scheme that there are good reasons to doubt their ability to complete a project satisfactorily or to work to appropriate standards. Such concerns should always be voiced to the DAC, not the parish, and must be based on objective evidence. Similarly, when a parish and a contractor have taken trouble to work up an appropriate scheme of work it is not the role of the DAC, or their adviser, to point out a contractor who will do the job for half the price 'to help the parish'.

### **Conflict of interest**

When the adviser is a practitioner in the area of expertise they should be careful to avoid conflicts of interest and ideally will not work professionally in churches in the diocese in the area for which they advise the DAC (e.g. organ building, bell hanging etc). The DAC adviser and DAC Chair should discuss the possibility of a genuine or perceived conflict of interest. If the adviser does work for a fee in a matter that concerns the DAC they should declare an interest and take no part in the DAC's discussion of their schemes. In such cases the DAC will need to consider whether alternative advice is required. The adviser must be able to give unbiased advice, regardless of personal preferences and understand the need for appropriate confidentiality. The advice should be specific to the particular case, bearing in mind relevant similar casework.

For more detail please see the Council's separate guidance note on conflicts of interest, [A Note for DAC Advisers and Members Regarding Conflicts of Interest](#).

### **Practical matters**

The adviser should be a good representative of the DAC on site visits. They should therefore address parishes in a way that they can understand, without condescension and without expressing inappropriate views about the work of particular practitioners, and should not seek to use their position for personal advantage.

The expenses incurred by the adviser in the course of DAC business should be met by the DAC. Advisers should not send invoices to churches for their expenses, neither should they move from giving a parish free advice on an initial visit to charging on a consultancy basis for subsequent ones. It is good practice for advisers to keep their professional skills up to date and for DACs to pay expenses incurred by advisers in attending conferences and study days that are relevant to their advisory work.

