



Historic England

Repair Grants for Heritage at Risk



Maintenance Plans

Contents

1	About this Document	1	3	Preparing a Maintenance Plan....	4
1.1	Introduction	1	3.1	Identifying the maintenance tasks	4
1.2	This document	1	3.2	Writing your maintenance plan	6
2	Understanding Maintenance	2	3.3	Timeframe of your maintenance plan.....	7
2.1	What is maintenance?	2	3.4	Reviewing your maintenance plan.....	7
2.2	Why you need a maintenance plan	3	4	Keeping Records of Maintenance Works Carried Out	8
			5	Where to Get Advice	9
			6	Example Maintenance Plan.....	10

1 About this Document

1.1 Introduction

Maintenance is an essential part of the good management of your property. It will protect the fabric of your building, monument, park or garden and help preserve its significance. Modest spending on regular maintenance can save you money in the longer term by reducing the need for costly repairs.

Although maintenance costs themselves are not eligible for a grant from us, preparing an appropriate and costed long-term maintenance plan can be an eligible cost. We cannot offer a grant towards the cost of preparing a maintenance plan if this has already been done prior to us making a written grant offer and your accepting it.

If we offer you a grant for project development work, you will normally need to prepare a costed maintenance plan as part of this work. We will set this out in the Historic England Report if it applies to your project and include the estimated cost for your professional adviser to prepare it amongst the eligible costs.

If we offer you a grant for repair work only, you will have sent us a costed maintenance plan as part of your application for a grant. You may have prepared this with grant from us as part of earlier project development work or independently. We will need to approve the maintenance plan before it is adopted as a condition of our grant.

Once you have completed your project, you will need to carry out maintenance in accordance with the agreed plan, keep records of the maintenance works carried out and certify to us annually that this has been done while the grant conditions are in force.

1.2 This document

You should read this document in conjunction with *Guidance for Grant Recipients*, which is available on our website:

www.HistoricEngland.org.uk/services-skills/grants/our-grant-schemes/grants-available/repair-grants

Maintenance Plans aims to help you and your professional adviser prepare a costed maintenance plan which is appropriate for your property and which will meet the conditions of our grant. This guidance and the example plan refer primarily to standing structures. You and your professional adviser should apply the same principles when preparing a costed maintenance plan for buried remains, parks or gardens.

2 Understanding Maintenance

2.1 What is maintenance?

Maintenance is the routine work that is necessary to keep the fabric of a building, monument, park or garden in good order. When carried out on a planned basis, maintenance helps to limit the deterioration of the fabric and prevent the types of failure which would otherwise occur over time.

Maintenance falls into three main categories:

- **inspection** to assess condition, report any problems and decide whether repair or other work is necessary. This should be done on a periodic basis at defined intervals. There should also be rapid inspections if there are any severe weather episodes or unforeseen events
- **planned preventive maintenance**, such as testing building services, clearing debris from gutters and painting and decorating. For buried remains, this may include maintaining a healthy grass cover and controlling weeds and burrowing animals. For a park or garden, it would include the calendar of gardening tasks. This category of maintenance work needs to be done on a regular cycle and can be planned to maximise cost-effective use of labour and temporary access eg scaffolding or mobile access platform. The appropriate cycle will vary according to the task, with some needing to be done several times each year and others every few years
- **reactive maintenance** consisting of minor repairs, such as fixing slipped slates, replacing broken glass and making temporary 'flashband' repairs to leadwork. For buried remains, this may include repairing any damaged stock-proof fencing and repairing erosion scars. For a park or garden, it may include the renewal of damaged plantings

Maintenance differs from repair. Repair is work carried out to put right defects caused by decay, damage or use. In contrast to reactive maintenance, repair implies work to return a property to a good condition on a long-term basis.

2.2 Why you need a maintenance plan

A programme of comprehensive repair to a property does not remove the need for ongoing maintenance. Regular maintenance is the best way to ensure the long-term preservation and continued use of a property. Such work is part of the day-to-day responsibility of all owners and occupiers.

Not only should planned maintenance extend the life and preserve the appearance of your property, it is most beneficial in conservation terms. This is because less historic fabric is lost in regular, small-scale work than in disruptive and extensive repairs made necessary by ignoring or deferring maintenance tasks. In this way, the preservation of the significance of the property is maximised.

Good maintenance needs the regular investment of modest amounts of time and money. The cost of preparing and carrying out a planned maintenance programme should be far less than the costs resulting from a series of unplanned major repairs. A costed maintenance plan will help you plan your future financial commitments and fundraising needs.

3 Preparing a Maintenance Plan

3.1 Identifying the maintenance tasks

A maintenance plan should be proportionate to the size and complexity of your property and be based on a thorough understanding of it. You will need to take account of the prevailing conditions of climate and setting, as well as the use and environment inside the property where appropriate.

The maintenance plan, which will be prepared by your professional adviser, should contain the following information:

3.1.1 Element or character area

Buildings and structures

You should identify each main element of the building or structure, including:

- roofs
- rainwater disposal system, both above and below ground
- external walls, including doors and windows
- internal structure
- building services
- boundaries/perimeters

Buried remains

You need to know the extent of the buried remains, including a buffer zone around the perimeter. This is the area which your maintenance plan should cover. You should identify each main element of the land within that area, for example land may be arable or under pasture, there may be tree cover etc.

Parks and gardens

You should identify each distinct character area of the park or garden, including:

- drives and approaches
- formal gardens
- kitchen gardens
- parkland

The character areas can be further subdivided as follows:

- specimen trees
- tree features, such as avenues and arboreta
- shrubs
- woodlands and shelterbelts
- hedges and topiary
- turf and grassland
- flower borders, plant collections and garden features, such as rockeries
- water features
- boundaries
- drives, paths, steps and visitor access
- park and garden ornaments, structures and buildings
- livestock enclosures, such as deerparks, or wildlife habitats, such as bat roosts (especially where there are protected species)

3.1.2 Maintenance task

List the maintenance tasks (inspection, planned preventive maintenance and reactive maintenance) which are to be carried out to each main element or distinct character area. Reactive maintenance tasks should be included, on a provisional basis, where they are reasonably predictable.

You should not include repairs in your maintenance plan.

Health and safety considerations

You should take into account how each maintenance task can be carried out safely, bearing in mind the equipment and training necessary, for example where access at height is required.

Environmental and wildlife considerations

When planning your maintenance you should make sure that all tasks can be carried out sensitively and comply with environmental and wildlife legislation.

3.1.3 Responsibility

Identify who is responsible for carrying out each maintenance task. Categories could include:

- staff
- contractors
- specialists, such as electrical contractors, engineers, steplejacks, arboriculturalists or horticulturalists
- unskilled workers
- volunteers

3.1.4 Frequency

Maintenance is most effective when carried out regularly, on a planned cycle. Decide how often each maintenance task should be carried out. The appropriate frequency may depend on the condition of each main element or distinct character area. It should be one of the following:

- **occasional**, such as inspecting roof areas or rainwater goods during or after stormy weather and taking necessary action
- **regular (frequent)**, for tasks carried out at least once a year, such as clearing rainwater goods twice per year
- **regular (cyclical)**, for tasks carried out less than once a year, such as testing electrical installations every four years

3.1.5 Cost

A cost estimate should be noted against each maintenance task. These costs can be added up to provide an annual maintenance cost. For this purpose, the cost of the regular (cyclical) tasks, ie those carried out less than once a year, can be averaged out over the length of the cycle.

To help you plan your future financial commitments and fundraising needs, you or your professional adviser should obtain realistic estimates for the cost of implementing your maintenance plan over the ten or fifteen years (see [Section 3.3](#) for information on the timeframe of your maintenance plan). You will need to bear in mind that realistic costs will have to take into account safe working practices and means of access.

The labour cost of tasks carried out by volunteers will of course be zero but a notional cost can be allocated where other funders or agencies require the value of volunteer inputs to be expressed in monetary terms.

3.2 Writing your maintenance plan

To convert this information into a maintenance plan you should allocate each of the regular (frequent) tasks to an appropriate month (or months) of the year. It is important to take into account who will be carrying out each task so that you can group tasks sensibly and make best use of resources. For example:

- If you employ a building contractor to clear the gutters every six months, this task should be carried out in spring and autumn, after the fall of blossom and leaves respectively. Other tasks which your building contractor carries out, such as inspecting and carrying out minor repairs to roof coverings, could be done at the same time
- If unskilled or voluntary workers check the building for signs of beetle activity in May, then other non-skilled internal inspections, such as checking the internal structure for signs of structural movement, could also be carried out in May

The regular (cyclical) tasks are best considered separately because they will need to be done less than once a year and will therefore not fit the calendar format recommended for the more frequent regular tasks.

You may find it helpful to present your maintenance plan in the form of a table, as shown in the example in [part 6](#). Please treat this as an example rather than a template, as the content and format of your maintenance plan should be tailored to the particular needs of your property.

3.3 Timeframe of your maintenance plan

For grant offers of up to £200,000, grant conditions continue to apply for ten years from the date of the final grant payment. For grant offers of over £200,000, a fifteen-year period will apply. If we have offered you a grant towards repair or other main work, these conditions include carrying out maintenance in accordance with the agreed costed maintenance plan once your project is complete.

The tasks in your maintenance plan should therefore be programmed over a period of ten years if our grant offer is up to £200,000 and fifteen years if it is over £200,000. The plan will come into force from the date of our final grant payment. This means that when calculating the year that your maintenance plan should start, you will need to allow time for the completion of your project.

3.4 Reviewing your maintenance plan

You should review your maintenance plan every five years to help make sure it remains up-to-date and reflects any change(s) in circumstances.

Although it is not a condition of our grant, we recommend that a suitably qualified and experienced professional adviser undertakes a condition survey of your property every five years. This condition survey will be a good way of checking how effective your maintenance plan has been and helping you update it, as well as identifying any repairs outside the scope of the plan which will be needed over time.

4 Keeping Records of Maintenance Works Carried Out

It is good practice to keep records of all maintenance works, as well as repairs and other work, to your property. If we have offered you a grant towards repair or other main work, you must keep records of the maintenance works carried out while the grant conditions are in force. You will need to send us a copy of these records if we ask for them. This is a condition of our grant.

We suggest that you keep a log book which you should update when any maintenance work is carried out to your property. For each action, you should record:

- the date
- the name of the individual or contractor who carried out the task
- a summary of the action taken
- before and after photographs (where possible and relevant)
- any reports received
- invoices for work carried out

5 Where to Get Advice

For further advice about preparing a costed maintenance plan, please contact your local office. You can find details of all our local offices and the areas which they cover on our website: www.HistoricEngland.org.uk/about/contact-us/local-offices/

Historic England's *Practical Building Conservation: Conservation Basics* gives further detail on preparing a maintenance plan, including a comprehensive example plan. You can find out information about this publication on our website: www.HistoricEngland.org.uk/advice/technical-advice/buildings/practical-building-conservation

The Church of England's Church Care website www.churchcare.co.uk includes a Calendar of Care, which gives useful advice to those responsible for most types of building.

The Heritage Lottery Fund's website www.hlf.org.uk includes guidance on management and maintenance plans, including specific guidance for parks.

6 Example Maintenance Plan

Occasional and regular (frequent) tasks

Ref	Element or character area	Maintenance task	Responsibility	Frequency	Annual cost £	J	F	M	A	M	J	J	A	S	O	N	D
1.1	Roofs																
1.1.1	Roof areas generally	Inspect roof areas from the ground and accessible high points and report any loss or damage to the roof coverings. Remove moss, leaves and other debris.	unskilled/voluntary	i. after stormy weather ii. annually			√										
1.1.2	Slate and tile roofs and vertical cladding	Inspect for cracked, displaced and broken slates and tiles. Replace to match.	contractor	twice per year				√									√
1.1.3	Sheet metal roofs and cladding	Inspect condition of panels, joints and clips. Make temporary repairs to cracks and splits.	contractor	twice per year				√									√
1.1.4	Ridge tiles	Inspect bedding and jointing between ridge tiles. Re-bed and repoint as necessary.	contractor	annually				√									
1.1.5	Lead weatherings and flashings	Inspect condition of lead flashings and weatherings. Make minor repairs (eg dress back clips, make good mortar fillets).	contractor	annually				√									
1.1.6	Asphalt roofs	Inspect condition of flat areas and upstands. Make temporary repairs to splits and holes.	contractor	twice per year				√									√

Ref	Element or character area	Maintenance task	Responsibility	Frequency	Annual cost £	J	F	M	A	M	J	J	A	S	O	N	D
1.2	Rainwater disposal																
1.2.1	Rainwater goods generally	Inspect rainwater goods from the ground and accessible high points and report any loss or damage.	unskilled/voluntary	i. during/ after stormy weather ii. annually			✓										
1.2.2	Rainwater goods	Clear rainwater goods of debris and ensure overflows are clear. Rod if necessary. Check that stainless steel guards are secure.	contractor	twice per year						✓						✓	
1.2.3	Rainwater goods	Inspect rainwater goods for cracks and leaks. Repair or replace any cracked sections.	contractor	twice per year						✓						✓	
1.2.4	Perimeter drainage channel	Clear drainage channel of vegetation and debris.	unskilled/voluntary	monthly, spring and summer				✓		✓	✓	✓	✓	✓			
1.2.5	Perimeter drainage channel	Inspect drainage channel for cracks and open joints. Seal with appropriate sealant.	contractor	twice per year						✓						✓	
1.2.6	Below ground drainage	Open up inspection chambers. Check that all gullies and gratings are free from silt and debris and that water discharges freely to mains sewerage or soakaway.	contractor	twice per year							✓					✓	

Ref	Element or character area	Maintenance task	Responsibility	Frequency	Annual cost £	J	F	M	A	M	J	J	A	S	O	N	D
1.3	External walls																
1.3.1	External walls generally	Inspect external walls from the ground and accessible high points and report any damage and signs of movement.	unskilled/voluntary	i. after stormy weather ii. annually			✓										
1.3.2	External walls, copings and parapets	Remove any vegetation, ivy etc.	contractor	annually												✓	
1.3.3	Ventilation	Ensure that ventilation grilles, air bricks, louvres etc are secure and free from obstruction.	contractor	twice per year			✓							✓			
1.3.4	Bird screens	Check that tower, roofs and windows are bird-proof before nesting starts. Do not disturb bats.	unskilled/voluntary	annually			✓										
1.3.5	Windows	Inspect windows and make essential minor repairs to glazing.	contractor	twice per year			✓										✓
1.3.6	Leaded light windows	Inspect lead cames, putty, glass and wire ties and report any problems. Clear condensation drainage channels and holes.	unskilled/voluntary	annually			✓										
1.3.7	Doors and windows	Check operation of hinges, bolts and locks and lubricate as necessary. Check security of locks.	unskilled/voluntary	twice per year			✓							✓			
1.3.8	Foliage and large trees close to walls	Check trees and large shrubs. Report any dead branches and signs of ill health, or root damage to the building or below-ground drainage.	unskilled/voluntary	annually													✓

Ref	Element or character area	Maintenance task	Responsibility	Frequency	Annual cost £	J	F	M	A	M	J	J	A	S	O	N	D
1.4	Internal structure																
1.4.1	Internal spaces generally	Inspect roof voids and internal spaces, particularly below gutters. Report on any evidence of roof or gutter leaks.	unskilled/voluntary	i. during/ after stormy weather ii. annually						✓							
1.4.2	Internal structure and fabric	Inspect internal structure and fabric including roof timbers and cupolas, and report on any signs of structural movement or of damp, fungal growth and dry rot.	unskilled/voluntary	annually						✓							
1.4.3	Exposed woodwork	Inspect exposed woodwork and surfaces below for signs of active beetle infestation. Report any beetles or fresh wood dust.	unskilled/voluntary	annually						✓							
1.4.4	Roof and floor voids	Check roof and floor voids, inspect for signs of vermin, and remove. Avoid using poison when bats are roosting.	unskilled/voluntary	annually										✓			
1.4.5	Chimneys	Sweep open flues.	contractor	annually									✓				
1.4.6	Generally	Ventilate the building.	unskilled/voluntary	monthly on dry days						✓	✓	✓	✓	✓			

Ref	Element or character area	Maintenance task	Responsibility	Frequency	Annual cost £	J	F	M	A	M	J	J	A	S	O	N	D
1.5	Building services																
1.5.1	Lightning protection installation	Visually inspect the lightning conductor system including spikes, tapes, earth rods and all connections and fastenings.	lightning conductor engineer	annually							√						
1.5.2	Heating system	Service the heating system and update the service schedule.	Approved Code of Practice engineer	annually						√							
1.5.3	Water	Ensure that all exposed water tanks, water pipes and heating pipes are protected against frost.	unskilled/voluntary	annually											√		
1.5.4	Induction loop hearing aid system	Inspect general condition and connections and report any faults.	unskilled/voluntary	annually							√						
1.5.5	Fire fighting equipment	Service fire extinguishers.	specialist	annually										√			
1.5.6	Burglar alarm system	Test system and visually inspect wiring. Qualified engineer to service alarm.	specialist	annually											√		
Ref					Annual cost £												
1.6	Total annual cost for occasional and regular (frequent) tasks																

Regular (cyclical) tasks

Ref	Element or character area	Maintenance task	Responsibility	Frequency	Cost	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
2.1	Rainwater disposal														
2.1.1	Rainwater goods	Repaint.	contractor	7 years	£			√							√
2.1.2	Timber fascia boards	Repaint.	contractor	7 years	£			√							√
2.2	External walls														
2.2.1	Tower	Inspect upper levels of tower.	steeplejack	5 years	£		√					√			
2.2.2	Doors and window frames	Repaint.	contractor	7 years	£			√							√
2.3	Building services														
2.3.1	Wiring and electrical installations	Inspect all wiring and electrical installations, including all portable electrical equipment, in accordance with current regulations.	electrical contractor registered with National Inspection Council for Electrical Installation Contracting or Electrical Contractors Association	4 years	£	√				√				√	
2.4	Review														
2.4.1	All	Carry out condition survey.	professional adviser	5 years	£				√					√	
2.4.2	All	Review maintenance plan.	professional adviser	5 years (following condition survey)	£				√					√	
Ref						Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
2.5	Total cost per year for regular (cyclical) tasks					£	£	£	£	£	£	£	£	£	£



Historic England

We are the public body that helps people care for, enjoy and celebrate England's spectacular historic environment.

HistoricEngland.org.uk

If you would like this document in a different format, please contact our customer services department on:

Tel: 0370 333 0607

Textphone: 0800 015 0174

Email: customers@HistoricEngland.org.uk

Cover images

- Image one: Newman Brothers' Coffin Furniture Works, Birmingham
- Image two: Grand Hotel, Colmore Row, Birmingham
- Image three: Bolam Coyne, Newcastle-upon-Tyne
- Image four: Kensal Green Cemetery, London
- Image five: Briton's Arms, Norwich
- Image six: Whitesyke and Bentyfield lead mines, Cumbria
- Image seven: Middleport Pottery, Stoke-on-Trent
- All images © Historic England

Contact Historic England

East of England

Brooklands
24 Brooklands Avenue
Cambridge CB2 2BU
Tel: 01223 582749
Email: eastofengland@HistoricEngland.org.uk

London and South East

4th Floor
Cannon Bridge House
25 Dowgate Hill
London EC4R 2YA
Tel: 020 7973 3700
Email: londonseast@HistoricEngland.org.uk

Midlands

The Foundry
82 Granville Street
Birmingham B1 2LH
Tel: 0121 625 6888
Email: midlands@HistoricEngland.org.uk

North East and Yorkshire

Bessie Surtees House
41-44 Sandhill
Newcastle Upon Tyne
NE1 3JF
Tel: 0191 269 1255
Email: northeast@HistoricEngland.org.uk

37 Tanner Row
York YO1 6WP
Tel: 01904 601948
Email: yorkshire@HistoricEngland.org.uk

North West

3rd Floor
Canada House
3 Chepstow Street
Manchester M1 5FW
Tel: 0161 242 1416
Email: northwest@HistoricEngland.org.uk

South West

Fermentation North (1st Floor)
Finzels Reach
Hawkins Lane
Bristol BS1 6JQ
Tel: 0117 975 1308
Email: southwest@HistoricEngland.org.uk

Publication date: April 2004 © English Heritage
Reissue date: May 2019 © Historic England
Design: Historic England

Please consider the environment before printing this document