



Maintenance plan guidance

November 2015

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Introduction

If you are applying to the Listed Places of Worship: Roof Repair Fund for a grant we will ask you to prepare a costed **maintenance plan** when you complete your project as part of the Standard Terms of Grant.

Maintenance is the routine, everyday work which is needed to protect the fabric of a building. When carried out on a planned basis, maintenance helps prevent the types of failure which can happen to a building.

Maintenance falls into three main categories:

- inspection to assess the condition of a building, report any problems and decide whether repair or other work is needed;
- specific tasks such as testing building services and clearing rubbish from gutters;
- minor repairs such as fixing slipped slates, replacing broken glass and making temporary 'flashband' repairs to leadwork.

Maintenance is different to repair, which is the work carried out to put right faults, significant decay or damage, and work to return a building to a good condition on a long-term basis. Maintenance includes:

- maintaining lighting;
- keeping paths, fences and means of access in good condition;
- clearing gutters and keeping drains clear;
- painting woodwork and replacing slipped roof tiles;
- keeping working objects in good operational condition;
- dealing with litter, waste collection and disposal;
- housekeeping and routine cleaning;
- regular inspections of equipment, structures and services; and
- caring for trees and other vegetation.

Good maintenance is crucial to the long-term care of historic places of worship which means having the right skills and procedures to ensure that they are looked after. Poor maintenance puts your place of worship at risk, and can lead to higher costs in the future.

As part of our standard terms of grant, we will ask you to ensure that the work we have funded is kept in good condition. But within reason we will also encourage you to ensure your maintenance plan covers the entire place of worship or other buildings you are responsible for. The plan can help you look after them in the future.

We will expect your organisation to adopt your maintenance plan, to integrate it into your existing policies for management and care, and to provide financial resources to implement that plan for ten years after project completion.



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This guidance note will help you to prepare a maintenance plan. It tells you what information it should contain, and how it can help you manage your place of worship.

What is a maintenance plan?

The maintenance plan is a document in which you set out what maintenance you need to do, when you will do it, and who will do it. It also tells us how much it will cost and how you will monitor the work.

It is a good idea to carry out a condition survey of your place of worship every five years. This should be done by a conservation-accredited architect, architectural technologists with conservation-accreditation from the Chartered Institute of Architectural Technologists' or a Royal Institution of Chartered Surveyors conservation-accredited building surveyor. This survey will be a good way of showing how effective your maintenance plan has been. You should not use your maintenance plan as a replacement for constant care.

We will send you an evaluation questionnaire one year, five years, and ten years after your project is complete to ask you how you are looking after the place of worship to ensure the maintenance plan is being implemented. We will follow up on a sample of projects as part of our standard programme of evaluation.

Preparing a maintenance plan

Your costed maintenance plan should contain the following information:

Building element

You should identify each element of the building, including:

- roofs;
- systems for getting rid of rainwater, both above and below ground;
- external walls, including doors and windows;
- the structure inside; and
- building services

You may find it useful to list the parts of the building in the same order as in the five yearly (Quinquennial) inspection report or condition survey for your place of worship. Your plan should not include the contents of your place of worship.

Maintenance tasks

List the maintenance tasks (inspection, specific tasks and minor repairs) which you will carry out to each part of the building.

Responsibility

Decide who will do the work. It might include:

- unskilled or voluntary workers, such as members of your congregation;
- building contractors; and
- specialists, such as electrical contractors, engineers or steeplejacks.

Make sure that whoever does the work has the skills and knowledge to do it, and that they have safe access and equipment. If possible look for contractors with the relevant professional accreditation.

How often?

Decide how often each maintenance task should be carried out. This may depend on the condition of each part of the building and could be:

- occasional, such as inspecting roof areas and rainwaters goods during or after stormy weather;
- regular, for tasks carried out at least once a year, such as clearing rainwater goods every six months; or cyclical, for tasks carried out less than once a year, such as testing the electrical systems every five years.

Writing your maintenance plan

To turn this information into a 10-year maintenance plan, you should plan when to do each of the regular tasks in an appropriate month (or months) of the year, taking into account who will be carrying out the task. 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. 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 volunteers check for signs of beetle activity in May, other non-skilled internal inspections, such as inspecting the internal structure for signs of structural movement, could also be carried out in May.

The Church of England's Church Care website www.churchcare.co.uk includes a 'Calendar of care' leaflet which gives useful advice to those responsible for places of worship of all faiths and denominations.

You should programme the cyclical tasks over a 10-year period starting from the day we make our final grant payment.

You should get realistic budget estimates for the cost of carrying out your maintenance plan over the 10-year period. You will need to bear in mind that these costs will have to take account of safe working practices and means of access.

You may find it helpful to present your maintenance plan in the form of a table, as shown in Appendix 2 on pages 11–30. This is an example rather than a template so you can tailor the contents and format of your maintenance plan to the particular needs of your place of worship.

Appendix 1: Resources

The following list of websites contains useful information about all aspects of caring for historic places of worship.

Historic Building Management and Maintenance

Cadw

www.cadw.wales.gov.uk

Cadw is the Welsh Government's historic environment service, providing a wide range of guidance.

ChurchCare

www.churchcare.co.uk

Although this site is specific to Church of England churches it has advice that is useful for any historic places of worship.

Historic England

www.historicengland.org.uk

Historic England is the Government's statutory advisor on the historic environment. It provides wide-ranging guidance on all aspects of caring for the historic environment.

Historic Environment Scotland

www.historic-scotland.gov.uk

Historic Environment Scotland is an executive agency of the Scottish Government with responsibility for the historic environment. It provides an extensive range of general guidance and technical advice notes.

The Institute of Historic Building Conservation (IHBC)

www.ihbc.org.uk

IHBC is the main professional organisation for building conservation practitioners and historic environment specialists. Its website contains a wide range of guidance, advice and links to other resources.

Northern Ireland Environment Agency (NIEA)

www.doeni.gov.uk/

NIEA is the Government's statutory advisor on the natural and historic environment in Northern Ireland. It provides an extensive range of advice and guidance on the conservation and promotion of the environment.

Society for the Protection of Ancient Buildings (SPAB)

www.maintainyourbuilding.org.uk

SPAB provides an excellent website resource dedicated to the care of old buildings.

www.spabfim.org.uk/



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The SPAB Faith in Maintenance initiative includes a calendar of maintenance and a handbook for maintaining churches, which again is useful for other kinds of building.

<http://www.spabmcp.org.uk/>

The Maintenance Co-operatives Project aims to connect, encourage and support the dedicated volunteers across the country who are responsible for the upkeep of their places of worship, ensuring the survival of our most beautiful and significant local landmarks.

Upkeep

www.upkeep.org.uk

Upkeep is a charity set up to promote the management and maintenance of all types of buildings. Its website contains useful resources as well as information on a wide range of upcoming training courses on building management and maintenance.

Conservation professionals

Royal Institution of Chartered Surveyors (RICS)

www.rics.org

RICS is the organisation for chartered surveyors and is the leading source of land, property, construction and related environmental knowledge.

Royal Institute of British Architects (RIBA)

www.architecture.com

This is the UK body for architecture and the architectural profession. The website includes guidance on finding an architect. There is also a register of Architects Accredited in Building Conservation, **www.aabc-register.co.uk**.

Royal Society of Architects in Wales (RSAW)

www.architecture.com/RegionsAndInternational

RSAW is a national organisation within RIBA for chartered architects in Wales.

Royal Incorporation of Architects Scotland (RIAS)

www.rias.org.uk

This is the professional body for chartered architects in Scotland.

The Royal Society of Ulster Architects (RSUA)

www.rsua.org.uk

RSUA is the professional body for chartered architects in Northern Ireland.

Natural heritage and biodiversity.

National Biodiversity Network

www.nbn.org.uk



LISTED PLACES OF WORSHIP
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The National Biodiversity Network pulls together information on species and habitat and shares this information through its website.

National Federation for Biological Recording (NFBR)

www.nbn-nfbr.org.uk

If you want to find out about important biodiversity on your site, you can start by contacting your local record centre. The website for the National Federation of Biological Recording includes a database of local record centres throughout the UK.

Natural England

www.naturalengland.org.uk

Natural England is the Government's adviser on the natural environment. They provide practical advice on how best to safeguard England's natural heritage including its wildlife, habitats, geodiversity and landscapes.

Scottish Natural Heritage

www.snh.gov.uk

Scottish Natural Heritage is the Scottish Government body responsible for Scotland's wildlife, habitats, landscapes, geodiversity and natural beauty. Their website includes policy, advice and guidance on promoting and improving natural heritage.

Appendix 2: Listed Places of Worship Roof Repair Fund: Maintenance plan template

This 10-year maintenance plan template is designed to be filled out and submitted as part of your funding application. You should plan when to do each of the regular tasks in an appropriate month (or months) of the year, taking into account who will be carrying out the task. Read the Maintenance plan guidance document for more information.

Each generic building element has a separate table, with suggested specific building elements added in. You can amend or add to these entries to suit your project.

Annual tasks

Table key

Building element: Identify and list each element of the building

Maintenance task: List the maintenance tasks that you will carry out to each part of the building

Responsibility: Assign the work to a person or position

Frequency: Detail how often each maintenance task should be carried out (daily, monthly, annually, after an event etc)

Annual: How much will the work costs each year (£)?

Months: Jan-Dec (enter 'Y' in the appropriate months' columns)

Roofs

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
General roofs	Inspect roof areas from the ground and accessible high points (with binoculars) and report any loss or damage to roof coverings.	Volunteer	After storms and annually				Y									
Clay tiles, natural slate and stone tile roofs and vertical cladding	Inspect for cracked, displaced and broken slates and tiles. Replace to match	Contractor	Twice yearly						Y						Y	

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sheet metal roofs and cladding	Inspect condition of panels, joints and clips. Make temporary repairs to cracks and splits	Contractor	Twice yearly						Y						Y	
Ridges and hips	Inspect bedding and jointing between ridge tiles. Re-bed and repoint as necessary	Contractor	Annually						Y							

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Lead weatherings and flashings	Inspect condition of lead flashings and weatherings. Make minor repairs (eg dress back clips, make good mortar fillets)	Contractor	Annually						Y							
Asphalt roofs	Inspect condition of flat areas and upstands. Make temporary repairs to splits and holes	Contractor	Twice yearly						Y						Y	

Rainwater disposal

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Rainwater goods generally	Inspect rainwater goods from the ground and accessible high points and report any loss or damage	Volunteer	After storms and annually				Y									
Rainwater goods	Clear rainwater goods of debris and ensure overflows are clear; Rod if necessary. Check that stainless steel guards are secure	Contractor	Twice yearly						Y						Y	

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Rainwater goods	Inspect for cracks and leaks. Repair or replace any cracked sections.	Contractor	Twice yearly						Y						Y	
Perimeter drainage channel	Clear drainage channel of vegetation and debris	Volunteer	Monthly during spring and summer					Y	Y	Y	Y	Y	Y			

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Below ground drainage	Open up inspection chambers. Check that all gullies and gratings are free twice per year from silt and debris and that water discharges freely to mains sewerage and soakaway	Contractor	Twice yearly						Y						Y	

SAMPLE

External walls

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
External walls generally	Inspect external walls from the ground and accessible high points and report any damage and signs of movement	Volunteer	After storms and annually				Y									
External walls, copings and parapets	Remove any vegetation, ivy etc	Contractor	Annually												Y	

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Ventilation	Ensure that ventilation grilles, air bricks, louvres etc. are free from obstruction	Contractor	Twice yearly				Y						Y			
Bird screens	Check that tower, roofs and windows are bird-proof before nesting starts. Do not disturb bats.	Volunteer	Annually				Y									
Windows	Inspect windows and make essential minor repairs to glazing	Contractor	Twice yearly					Y							Y	

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Leaded light windows	Inspect lead comes, putty, glass and wire ties and report any problems. Clear condensation drainage channels and holes.	Volunteer	Annually				Y									
Doors and windows	Check operation of hinges, bolts and locks and lubricate as necessary. Check security of locks.	Volunteer	Twice yearly				Y						Y			

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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.	Volunteer	Annually						Y							

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Internal structures

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Internal spaces generally	Inspect roof voids and internal spaces, particularly below gutters. Report on any evidence of roof or gutter leaks	Volunteer	During/after stormy weather and annually						Y							

SAMPLE

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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.	Volunteer	Annually						Y							

SAMPLE

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Exposed woodwork	Inspect exposed woodwork and surfaces below for signs of active beetle infestation. Report any beetles or fresh wood dust.	Volunteer	Annually						Y							
Roof and floor voids	Check roof and floor voids, inspect for signs of vermin and remove. Avoid using poison when bats are roosting.	Volunteer	Annually										Y			

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Generally	Ventilate the building	Volunteer	Monthly on dry days						Y	Y	Y	Y	Y			

Building services

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Lightning protection installation	Visually inspect the lightning conductor system, including spikes, tapes, earth rods and all connections and fastenings	Lightning conductor engineer	Annually							Y						

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Heating system	Service the heating system and update the service schedule	Approved Code of Practice engineer	Annually						Y							
Water	Ensure that all exposed water tanks, water pipes and heating pipes are protected against frost	Volunteer	Annually											Y		
Induction loop hearing aid system	Inspect general condition and connections and report any faults	Volunteer								Y						

Building element	Maintenance task	Responsibility	Frequency	Annual cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Fire fighting equipment	Service fire extinguishers	Specialist	Annually										Y			
Burglar alarm system	Test system and visually inspect wiring. Qualified engineer to service alarm.	Specialist	Annually											Y		

SAMPLE

Cyclical tasks

You should programme the cyclical tasks over a 10-year period starting from the day we make our final grant payment.

Each building element has a separate table, with suggested building elements added in. Complete the responsibility, frequency and annual cost columns and enter 'Y' in the appropriate year columns. You can amend or add to these entries to suit your project.

Table key

Building element: Identify and list each element of the building

Maintenance task: List the maintenance tasks that you will carry out to each part of the building

Responsibility: Assign the work to a person or position

Frequency: Detail how often each maintenance task should be carried out (daily, monthly, annually, after an event etc)

Yearly cost: How much will the work costs (£)?

Years: Year 1 – Year 10 (enter 'Y' in the appropriate years' columns)

Rainwater disposal

Building element	Maintenance task	Responsibility	Frequency	Yearly cost	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Rainwater goods	Repaint	Contractor	7 years			Y							Y	
Timber fascia boards	Repaint	Contractor	7 years			Y							Y	

External walls

Building element	Maintenance task	Responsibility	Frequency	Yearly cost	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Years 8	Year 9	Year 10
Tower/spire	Inspect upper levels of tower/spire	Steeplejack	5 years							Y				
Doors and window frames	Repaint	Contractor	7 years			Y							Y	

SAMPLE

Building services

Building element	Maintenance task	Responsibility	Frequency	Yearly cost	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Years 8	Year 9	Year 10
Wiring and electrical installations	Inspect all wiring and electrical installations, including all portable electrical equipment, in accordance with current IEE regulations.	Electrical contractor registered with the National Inspection Council for Electrical Installation Contracting or Electrical Contractors Association	4 years						Y					

SAMPLE