

Maintaining value through maintenance

Recent research has shown how badly our approach to maintenance is letting down efforts to protect the heritage, and it points to new directions for policy and practice.

In *Context* 83 (March), Nigel Dann described a pilot project in Bath by Maintain our Heritage. Its aim was to test whether an annual inspection service for owners that has operated successfully in Holland for many years would work here. Reference was also made to a major research programme funded by the DTI, English Heritage and the HLF involving a number of other partners, including the IHBC. That work is now concluded. This article outlines the context, and summarises the conclusions and possible directions of future debate and public policy.

In the aftermath of *Power of Place*, *A Force for Our Future* and the Heritage Protection Review consultation, it is opportune for government, the construction industry, the professions, local authorities and owners to consider a wholesale change in policy and practice to promote the maintenance of historic buildings.

Maintenance is most beneficial when it is preventative, reducing or removing the need for repairs and thus preventing loss of original fabric. This has social, environmental, cultural and economic benefits. Yet when Maintain our Heritage instigated this research three years ago, it was clear that, in the main, maintenance was not being practised and promoted by policy makers, the construction industry or owners. Despite maintenance being the most sustainable management regime, it was considered that only a substantial shift in attitudes would be likely if a convincing and research-based case could be built. No one else was making that case – which was further hindered by activity on the ground being patchy, chaotic and a low priority.

It was clear that there was there was:

- A lack of leadership, incentives and encouragement
- A dearth of evidence about maintenance practice; emphasis on major repair rather than preventive maintenance, especially where grant regimes rewarded the most neglected (least maintained) buildings with the most grant aid
- A lack of published guidance for homeowners and small businesses on maintenance work or sources of information and services
- A shortfall in research on maintenance issues
- A failure to focus on the needs of individual homeowners, the vast majority of those caring for historic buildings
- A missed opportunity by the building professions and trades to provide services that make systematic maintenance convenient for building owners and managers.

Power of Place had asserted in 2000 that: ‘much of the need for capital expenditure on the historic

environment is the result of poor maintenance.’ It recommended ‘a shift from cure to prevention through planned maintenance for owners’. Owners needed to ‘carry out routine maintenance and regular condition surveys’.

A Force for our Future responded in 2001 that ‘the government fully endorses the increasing importance attached to the preventive maintenance of historic fabric. In discussions with English Heritage about future funding priorities, it will explore how a shift of emphasis towards preventive maintenance might be reflected in grant programmes.’

To build that convincing case, Maintain our Heritage focused on six modules of research: best practice maintenance management for listed buildings; individual owners’ approaches to the maintenance of their listed buildings; and provision of commercial maintenance services (all undertaken by the University of the West of England); technology (a review of products and services within the field of preventive inspection and maintenance); demand and supply (building the business case for planned maintenance) – undertaken by Arups; and maintenance education and training – undertaken by De Montfort Expertise). All the research reports are now available on the MoH web site www.maintainourheritage.co.uk.

We know that maintenance enhances a building’s appearance, extends its life and safeguards its investment value. We know that maintenance reduces or eliminates the cost and disruption to occupants when failures occur requiring large-scale restoration. We know that maintenance is sustainable, using fewer new materials and involving less extraction, processing and transport, waste and energy use, while reducing pressure for greenfield development.

We know that maintenance retains historic fabric because less material is lost in regular, minimal and small-scale work than in disruptive and extensive restoration. We also know it provides a business activity that is steady and counter-cyclical, bringing jobs all year round in all parts of the country.

Yet despite all this, in practice little maintenance is done, and many owners wait for things to go wrong before taking action. The value of *systematic* and *preventive* maintenance is not widely appreciated. A fundamental but simple change from passive endorsement to proactive encouragement is essential.

Current maintenance has a number of characteristics:

- Government policy is at odds with conservation principles: current legislation and policies do not adequately encourage maintenance – even where the philosophy of maintenance as the best means of

conservation is widely accepted. Furthermore, there is no duty of care. Listing imposes responsibility to obtain consent for alteration but there is no obligation to keep in good repair.

- Best practice elsewhere is not taken up in the conservation sector: examples of good maintenance practice by some non-heritage organisations, such as businesses, hospitals and housing associations, have not been drawn upon by the conservation sector.
- Lack of support for owners: owners are not encouraged or helped to maintain historic buildings. The iniquity of VAT on maintenance and repair, not alteration, persists. Basic information and advice are not available from a single source.
- Public benefits are not evaluated: the long-term value to the public of maintaining historic buildings is never evaluated because it is not currently quantifiable.
- Convenience not conservation: owners are not driven by conservation principles. They maintain their buildings primarily to avoid the inconvenience of disrepair.
- Reactive not systematic: owners tend to take a short-term view.
- Low priority of maintenance: owners do not give priority to maintenance because they do not have the skills required, and see it as a low-priority activity.
- Practicalities: owners need help in making it simpler to manage insurance; health and safety; access; and sourcing suitably skilled builders.
- Supply of maintenance services is limited by apparent lack of demand: suppliers have not developed preventive maintenance services, largely due to an apparent lack of demand, low revenue and its administratively intensive nature.

The Maintaining Value research programme has major policy implications. What we now require is:

- A UK strategy for maintenance. The government should promote a UK-wide debate on integrating maintenance into conservation policy and practice, leading to a UK strategy.
- Statutory duty of care balanced by financial, advisory and technical support. The government should either legislate for this or enable local authorities to introduce a minimum maintenance code to require owners to maintain listed buildings. To balance this responsibility, owners should be entitled to financial incentives and advisory and technical support.
- A review of current enforcement powers. The current historic building powers and procedures require urgent review to encourage local authorities to be more proactive.
- Best practice: heritage organisations and local authorities need to lead by example. Best practice process and procedures in conservation maintenance management need to be developed to transfer pass on experience of this to owners.
- Maintenance-focused grants and fiscal incentives. Maintenance should be central to the policy making of the relevant grant-giving bodies, including local authorities. They should consider a change of emphasis

to encourage owners to maintain buildings, not just restore those that are poorly maintained. It is essential that VAT anomalies be removed.

- Development of buildings at risk registers as information sources and advisory tools. The lead statutory bodies, in concert with local authorities, should develop the registers more fully as a management tool to provide interactive information on listed building condition; cover all listed buildings (not just Grades I and II*); and be used to monitor and encourage maintenance.
 - Maintenance guidance and information sources. The establishment of a UK advisory unit to coordinate maintenance-related initiatives and to provide advice to owners is essential. It should cover issues such as management, insurance, access, procurement, suppliers, materials, maintenance products, and health and safety. In particular the idea of a logbook for every listed building should be pursued and linked to the proposed home information packs. Local maintenance cooperatives and access equipment pools should be encouraged.
 - Assessing costs and value of maintenance. Further work is required to demonstrate the costs and value of maintenance tasks.
 - Motivating owners. Different incentives need to be devised to appeal to individuals and organisations to maintain their properties.
 - Facilitating maintenance. The lead bodies need to publish guidance on prioritising maintenance and on the issues of insurance, health and safety, and access, to inform owners about possible solutions. The government needs to support the appropriate skills, training and education bodies, and professional and trade organisations to address the issues of skills needs.
 - New maintenance services and products. The government should help companies to set up general maintenance services with expertise in the maintenance of historic buildings. A certification scheme for builders undertaking maintenance would show their competence and, where necessary, their awareness of conservation issues and techniques. The feasibility of new products needs to be assessed: examples are maintenance monitoring products and insurance-linked maintenance inspection contracts (along the lines of existing heating and plumbing schemes).
- Britain prides itself on the sophistication of its heritage protection. But the stark reality of the failings of current policy and practice in this fundamental aspect of our operations, and the sheer range of initiatives now considered to be required (let alone the specific individual actions across the sector that need to flow from this), show the size of the task ahead. *Power of Place, Restoration* and the debate about scarce resources in the heritage review have shown support for (and indeed an imperative for) new approaches. Now seems to be the right moment to match proactive effort to the rhetoric surrounding our vaunted heritage management.