

References

Cathedral Communications Limited (2003) *Building Conservation Directory*, Tisbury: Cathedral Communication Limited. Available from: <http://www.buildingconservation.com> (Accessed 27/03/03).

Construction Industry Training Board (2003) *National Heritage Training Report*, London: CITB.

Heritage Lottery Fund (2002a) *Sustaining Our Living Heritage*, London: HLF.

Appendix 1. Schedule for semi-structured telephone interviews with consultants and contractors

Q #	
1	You are listed on the (insert appropriate source) as specialising in historic building work, could you tell me what proportion of your overall workload this represents. High, Medium, Low?
2	Do you offer a maintenance service? If so could you tell me what kind of a service it is?
3	<p><i>If not covered by previous answer ask:</i></p> <p>Contractors Does any of your work involve providing an ongoing maintenance regime, i.e. regular clearing of gutter, painting, checking roofs and water proofing elements and carrying out minor repairs?</p> <p>Consultants Does your service include giving advice about planned preventative maintenance?</p> <p>Do you give advice about what to do about ad-hoc failures and the inevitable day-to-day problems beyond what is in the planned maintenance programme?</p>
4	<p>Contractors. Do you offer any kind of advice about how to maintain an element or a building once it has been repaired. If yes, please explain the nature of the advice given?</p> <p>Consultants. Do you provide a report about planned preventative maintenance as a result of doing a survey or inspection?</p>
5	<i>If previous answers indicate that a maintenance service is not offered or does not fall within our definition of maintenance ask:</i> Are there any reasons why you do not offer a maintenance service?
6	<i>If the answer coincides with our definition of maintenance ask:</i> What proportion of your maintenance work is to listed buildings? High, Medium, Low
7	<i>If the answer is none or low ask:</i> Why is this?
8	In what ways if any does your approach to maintenance work on listed buildings, differ to your approach on non-listed stock?
9	In terms of managing the service, what are the main advantages and disadvantages of offering work on listed buildings as compared to 'mainstream' maintenance work?

Appendix 2. Questionnaire sent to client organisations

Please write your name, the name of your organisation and the town/city in which it is located in the space provided below.

Name

Organisation's name

Town/City

SECTION 1: ABOUT YOUR BUILDINGS AND DEPARTMENT

1 How many listed buildings are in your building stock?

2 What is your budget for maintenance of your whole building stock as:

An overall figure? £

A proportion of all building work? %

3 How many people in your organisation are working on maintenance and repair at:

Managerial/ supervisory level?

Craft level?

4 How many people in your organisation have the following qualifications?

Chartered Building Surveyor (RICS) **Chartered Builders (CIOB)**

Chartered Architects (RIBA) **Facilities Managers (BIFM)**

Other qualifications (please specify and indicate number of people)

SECTION 2: OUTSOURCING MAINTENANCE WORK

5 Do you outsource maintenance work? **Yes** **No**

6 If you answered 'yes' to question 5, please go to question 7. If you answered 'no', please briefly describe your reasons for not outsourcing work and then proceed to question 15.

7 What are the main reasons for your organisation adopting a **policy** of outsourcing maintenance work? Please, tick all that apply and specify whether this applies to your listed and/or non-listed stock.

	Contractors	Consultants
Lack of in-house expertise	<input type="checkbox"/>	<input type="checkbox"/>
Expectation of cost savings	<input type="checkbox"/>	<input type="checkbox"/>
Organisational policy is to focus on core business	<input type="checkbox"/>	<input type="checkbox"/>
Value of independent advice	<input type="checkbox"/>	<input type="checkbox"/>
Requirement to demonstrate value for money through competition	<input type="checkbox"/>	<input type="checkbox"/>
Desire to build partnerships	<input type="checkbox"/>	<input type="checkbox"/>

Other important reasons? Please comment.

Contractors

Consultants

8 What are the factors that determine **on a job by job basis** which maintenance work is outsourced? Please tick all that apply.

	Contractors	Consultants
Need for particular expertise	<input type="checkbox"/>	<input type="checkbox"/>
Location of site/ building	<input type="checkbox"/>	<input type="checkbox"/>
Cost	<input type="checkbox"/>	<input type="checkbox"/>
Time constraints	<input type="checkbox"/>	<input type="checkbox"/>
Volume of work	<input type="checkbox"/>	<input type="checkbox"/>
Peaks and troughs in workload	<input type="checkbox"/>	<input type="checkbox"/>

Question 8 continued.

Other important factors? Please comment.

Contractors

Consultants

9 How many different organisations do you outsource maintenance work to?

Contractors

Consultants

As part of this research we will also be contacting service providers in your region. In order to help us identify a suitable sample for this part of the research, we ask you in the following questions to list the contractors and consultants that you use most frequently. Please be assured that we will not identify your organisation when making contact with the service provider. We will not divulge any of the information that you give about the extent and quality of services provided to you, nor will be asking the service provider about their relationship with you. If however you do not wish to name individual firms, please return the completed questionnaire to us, indicating their specialisms and how they were sourced only.

10 Please list up to 5 **contractors** who you use most often for maintenance work and indicate their specialism and how you sourced them.

Name of contractor	Specialism	How sourced

11 Please list up to 5 **consultants** who you use most often for maintenance work and indicate their specialism and how you sourced them.

Name of contractor	Specialism	How sourced

12A Are there any plans to make changes in the nature or volume of maintenance work outsourced to **contractors** in the foreseeable future?

Yes No

Please comment

12B Are there any plans to make changes in the nature or volume of maintenance work outsourced to **consultants** in the foreseeable future?

Yes No

Please comment

13A What are the main **disadvantages** that your experience of outsourcing maintenance work to **contractors** has brought to light?

13B What are the main **disadvantages** that your experience of outsourcing maintenance work to **consultants** has brought to light?

14 In respect of maintenance and repair work to listed buildings, are you generally satisfied with the quality of the services that you outsource in relation to:

A) PLANNING AND MANAGEMENT (IE THE QUALITY OF THEIR PROCESSES)?

Contractors Yes No

Consultants Yes No

Where there are problems or concerns, please explain the nature of those that occur most commonly:

B) TECHNICAL KNOWLEDGE AND SKILLS?

Contractors Yes No

Consultants Yes No

Where there are problems or concerns please explain the nature of those that occur most commonly

15 Are there specialist skills or knowledge that you find difficult to obtain for maintenance work?

Skill/ knowledge shortfall (please list) | Perceived cause of problem (please explain)

Skill/ knowledge shortfall (please list)	Perceived cause of problem (please explain)

16 Please explain how you deal with the shortfalls/difficulties identified in question 15

17 In the Netherlands an independent maintenance inspection service for listed buildings has existed for 30 years. The service:

- is independent of the statutory conservation authorities;
- is independent of an architect/buildings surveyor or any building contractor;
- provides a report on the maintenance condition of the building. This is based on an inspection of the listed building every 12-18 months which identifies the maintenance priorities for the following 12-18 months. The report is intended to enable the owner to subsequently commission appropriate works;
- includes on the spot 'first aid' repair for any small but critical disrepair encountered during the course of the inspection. These are time-limited to those that can be completed within 90 minutes.
- is by subscription.

How would you rate your potential interest in such a service/approach?

Please select one option only.

	High	Medium	Low	Not sure
Make use of the service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OR				
Incorporate the methodology in-house	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18 Would you be more or less likely to use an inspection service similar to the one described above if it was:

	More likely	Less likely	Don't know	
Linked to reduced premiums on your building's insurance		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linked to tax incentives		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linked to a grant scheme		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linked to a service that carried out all the work identified		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

THANK YOU VERY MUCH FOR TAKING THE TIME TO COMPLETE THIS QUESTIONNAIRE

Please write your name, the name of your organisation and the town/city in which it is located in the space provided below.

Name

Organisation's name

Town/City

SECTION 1: ABOUT YOUR BUILDINGS AND DEPARTMENT

1 How many buildings are in your listed and non-listed building stock?

Listed

Non-listed

2A What is your overall budget for maintenance?

As an overall figure: £

As a proportion of all building work: %

2B If the information is easily available, please provide an estimate of the proportion of your maintenance budget that is allocated to listed and non-listed stock.

Listed buildings %

Non-listed buildings %

3 What is the role of your department?

4 How many people in your organisation are working on maintenance and repair at:

Managerial/ supervisory level?

Craft level?

5 How many people in your department have the following qualifications?

Chartered Building Surveyor (RICS) **Chartered Builders (CIOB)**

Chartered Architects (RIBA) **Facilities Managers (BIFM)**

Other qualifications. Please specify and state number of people.

SECTION 2: OUTSOURCING MAINTENANCE

- 6 Do you outsource maintenance work?
- | | | |
|----------------------------|--------------------------|--------------------------|
| | Yes | No |
| For your listed stock: | <input type="checkbox"/> | <input type="checkbox"/> |
| For your non-listed stock: | <input type="checkbox"/> | <input type="checkbox"/> |

7 If you answered 'yes' to question 6, please go to question 8. If you answered 'no', please briefly describe your reasons for not outsourcing maintenance work and then proceed to question 19.

8 What are the main reasons for your organisation adopting a **policy** of outsourcing work? Please, tick all that apply and specify whether this applies to your listed and/or non-listed stock.

	Contractors		Consultants	
	Listed	Non-listed	Listed	Non-listed
Lack of in-house expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expectation of cost savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organisational policy is to focus on core business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value of independent advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requirement to demonstrate value for money through competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desire to build partnerships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other important reasons? Please comment.

Contractors

Consultants

9 What are the factors that determine **on a job by job basis** which maintenance work is outsourced? Please, tick all that apply and specify whether this pertains to your listed and/or non-listed stock.

	Contractors		Consultants	
	Listed	Non-listed	Listed	Non-listed
Need for particular expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location of site/ building	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time constraints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volume of work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peaks and troughs in workload	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other important factors? Please comment.

Contractors

Non-listed

Listed

Consultants

Non-listed

Listed

10 Approximately what percentage of your organisation's maintenance work for listed and non-listed buildings is outsourced to:

	Listed	Non-listed
Contractors?	<input type="text" value=""/> %	<input type="text" value=""/> %
Consultants?	<input type="text" value=""/> %	<input type="text" value=""/> %

11 Approximately how many different organisations do you outsource maintenance work to:

	Listed	Non-listed
Contractors?	<input type="text"/>	<input type="text"/>
Consultants?	<input type="text"/>	<input type="text"/>

12A Are there any plans to make changes in the nature or volume of maintenance work outsourced to **contractors** in the foreseeable future?

Yes No

Please comment

Non-listed

Listed

12B Are there any plans to make changes in the nature or volume of maintenance work outsourced to **consultants** in the foreseeable future?

Please comment

Non-listed

Listed

13A What are the main **disadvantages** that your experience of outsourcing of maintenance work to **contractors** has brought to light?

Non-listed

Listed

13B What are the main **disadvantages** that your experience of outsourcing of maintenance work to **consultants** has brought to light?

Non-listed

Listed

SECTION 3: APPLIES TO LISTED BUILDING STOCK ONLY

14A Do you look for different **contractors** when outsourcing maintenance work on your listed stock to those you outsource to for your non-listed stock?

Usually

Sometimes

Never

Please explain your reasons

14B Do you look for different **consultants** when outsourcing maintenance work on your listed stock to those you outsource work to for your non-listed stock?

Usually

Sometimes

Never

Please explain your reasons

As part of this research we will also be contacting service providers in your region. In order to help us identify a suitable sample for this part of the research, we ask you in the following questions to list the contractors and consultants that you use most frequently. Please be assured that we will not identify your organisation when making contact with the service provider. We will not divulge any of the information that you give about the extent and quality of services provided to you, nor will be asking the service provider about their relationship with you. If however you do not wish to name individual firms, please return the completed questionnaire to us, indicating their specialisms and how they were sourced only.

- 15 Please list up to 5 **contractors** who you use most often for maintenance work on your **listed stock** and indicate their specialism and how you sourced them.

Name of contractor	Specialism/s	How sourced

- 16 Please list up to 5 **consultants** who you use most often for maintenance work on your **listed stock** and indicate their specialism and how you sourced them.

Name of contractor	Specialism/s	How sourced

- 17 What, if any, barriers do you perceive there to be to your organisation outsourcing more of its maintenance work on listed buildings?

18 In respect of maintenance and repair work to listed buildings, are you generally satisfied with the quality of the services that you outsource in relation to:

A) PLANNING AND MANAGEMENT (IE THE QUALITY OF THEIR PROCESSES)?

Contractors Yes No

Consultants Yes No

Question 18 continued

Where there are problems or concerns, please explain the nature of those that occur most commonly.

B) TECHNICAL KNOWLEDGE AND SKILLS?

Contractors Yes No

Consultants Yes No

Where there are problems or concerns please explain the nature of those that occur most commonly.

19 Are there specialist skills or knowledge required to maintain your listed building stock, that you find difficult to obtain?

Skill/ knowledge shortfall (please list)	Perceived cause of problem (please explain)
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20 Please explain how you deal with the shortfalls/difficulties identified in Question 18?

- 21** In the Netherlands an independent maintenance inspection service for listed buildings has existed for 30 years. The service:
- is independent of the statutory conservation authorities;
 - is independent of an architect/buildings surveyor or any building contractor;
 - provides a report on the maintenance condition of the building. This is based on an inspection of the listed building every 12-18 months which identifies the maintenance priorities for the following 12-18 months. The report is intended to enable the owner to subsequently commission appropriate works;
 - includes on the spot 'first aid' repair for any small but critical disrepair encountered during the course of the inspection. These are time-limited to those that can be completed within 90 minutes.
 - is by subscription.

How would you rate your potential interest in such a service/approach?

Please select one option only.

	High	Medium	Low	Not sure
Make use of the service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OR				
Incorporate the methodology in-house	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 22** Would you be more or less likely to use an inspection service similar to the one described above if it was:

	More likely	Less likely	Don't know	
Linked to reduced premiums on your building's insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linked to tax incentives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linked to a grant scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linked to a service that carried out all the work identified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

THANK YOU VERY MUCH FOR TAKING THE TIME TO COMPLETE THIS QUESTIONNAIRE

Organisations with no historic stock

Please write your name, the name of your organisation and the town/city in which it is located in the space provided below.

Name

Organisation's name

Town/City

SECTION 1: ABOUT YOUR BUILDINGS AND DEPARTMENT

1 How many buildings are in your building stock?

2 What is your budget for maintenance as:

An overall figure? £

A proportion of all building work? %

3 How many people are working on maintenance and repair at:

Managerial/ supervisory level?

Craft level?

4 How many people in your department have the following qualifications? Please tick all that apply.

Chartered Building Surveyor (RICS)

Chartered Builders (CIOB)

Chartered Architects (RIBA)

Facilities Managers (BIFM)

Other qualifications (please specify and indicate number of people)

SECTION 2: OUTSOURCING MAINTENANCE WORK

5 Do you outsource maintenance work? Yes No

6 If you answered 'yes' to question 5, please go to question 7. If you answered 'no', please briefly describe your reasons for not outsourcing work and then proceed to question 15.

7 What are the main reasons for your organisation adopting a **policy** of outsourcing maintenance work? Please, tick all that apply.

	Contractors	Consultants
Lack of in-house expertise	<input type="checkbox"/>	<input type="checkbox"/>
Expectation of cost savings	<input type="checkbox"/>	<input type="checkbox"/>
Organisational policy is to focus on core business	<input type="checkbox"/>	<input type="checkbox"/>
Value of independent advice	<input type="checkbox"/>	<input type="checkbox"/>
Requirement to demonstrate value for money through competition	<input type="checkbox"/>	<input type="checkbox"/>
Desire to build partnerships	<input type="checkbox"/>	<input type="checkbox"/>

Other important reasons? Please comment.

Contractors

Consultants

8 What are the factors that determine **on a job by job basis** which maintenance work is outsourced? Please tick all that apply.

	Contractors	Consultants
Need for particular expertise	<input type="checkbox"/>	<input type="checkbox"/>
Location of site/ building	<input type="checkbox"/>	<input type="checkbox"/>
Cost	<input type="checkbox"/>	<input type="checkbox"/>
Time constraints	<input type="checkbox"/>	<input type="checkbox"/>
Volume of work	<input type="checkbox"/>	<input type="checkbox"/>
Peaks and troughs in workload	<input type="checkbox"/>	<input type="checkbox"/>

Question 8 continued.

Other important factors? Please comment.

Contractors

Consultants

9 How many different organisations do you outsource maintenance work to?

Contractors

Consultants

As part of this research we will also be contacting service providers in your region. In order to help us identify a suitable sample for this part of the research, we ask you in the following questions to list the contractors and consultants that you use most frequently. Please be assured that we will not identify your organisation when making contact with the service provider. We will not divulge any of the information that you give about the extent and quality of services provided to you, nor will be asking the service provider about their relationship with you. If however you do not wish to name individual firms, please return the completed questionnaire to us, indicating their specialisms and how they were sourced only.

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Name of contractor	Specialism/s	How sourced

11 Please list up to 5 **consultants** who you use most often for maintenance work and indicate their specialism and how you sourced them.

Name of contractor	Specialism/s	How sourced

12A Are there any plans to make changes in the nature or volume of maintenance work outsourced to **contractors** in the foreseeable future?

Yes No

Please comment

12B Are there any plans to make changes in the nature or volume of maintenance work outsourced to **consultants** in the foreseeable future?

Yes No

Please comment

13A What are the main **disadvantages** that your experience of outsourcing maintenance work to **contractors** has brought to light?

13B What are the main **disadvantages** that your experience of outsourcing maintenance work to **consultants** has brought to light?

14 In respect of maintenance and repair work to buildings, are you generally satisfied with the quality of the services that you outsource in relation to:

A) PLANNING AND MANAGEMENT (IE THE QUALITY OF THEIR PROCESSES)?

Contractors Yes No

Consultants Yes No

Where there are problems or concerns please explain the nature of those that occur most commonly:

B) TECHNICAL KNOWLEDGE AND SKILLS?

Contractors Yes No

Consultants Yes No

Where there are problems or concerns please explain the nature of those that occur most commonly:

15 Are there specialist skills or knowledge that you find difficult to obtain for maintenance work?

Skill/ knowledge shortfall (please list)	Perceived cause of problem (please explain)

16 Please explain how you deal with the shortfalls/difficulties identified in question 15

THANK YOU VERY MUCH FOR TAKING THE TIME TO COMPLETE THIS QUESTIONNAIRE

