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**Maintain  
our Heritage**

A REPORT ON THE BATH AREA  
PILOT MOUNTED BY MAINTAIN  
OUR HERITAGE 2002-03

# HISTORIC BUILDING MAINTENANCE – A PILOT INSPECTION SERVICE



## MAINTAIN OUR HERITAGE

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Maintain our Heritage (MoH) conceived, set up and ran the Bath Area Pilot.

MoH was formed in 1999 to promote the wider understanding and adoption of maintenance.

MoH is currently leading wide-ranging research into maintenance issues in partnership with DTI, English Heritage, Heritage Lottery Fund and others.

MoH's mission is to promote a new, long-term, sustainable strategy for the care of our historic buildings with pre-eminence given to maintenance rather than sporadic major repair. A shift to systematic maintenance will require a change in attitude, policy and practice in government, the construction industry, the heritage sector and historic building owners. This can only be achieved through the preparation and dissemination of a compelling, research-based case.

Maintain our Heritage is a not-for-profit company limited by guarantee (3983254).

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## HISTORIC BUILDING MAINTENANCE – A PILOT INSPECTION SERVICE

## SUMMARY

Maintain our Heritage (MoH) undertook the Bath Area Pilot, the first maintenance inspection service for historic buildings in the UK, in 2002-03.

The Pilot achieved its aim of demonstrating that it is practically, technically and legally possible to establish and operate such a service. A wide range of historic buildings was inspected and owners were provided with illustrated reports setting out maintenance action priorities. Some maintenance work such as clearing gutters and first-aid repairs to flashings, was done in the course of inspections. No problems were encountered concerning insurance, health & safety etc that invalidated the concept.

The target number of buildings, 72, was passed. Take up, however, was not on a scale to make the service immediately attractive commercially. MoH had anticipated at the outset that the service was unlikely to be economically viable, especially in a limited geographical area for a limited period. Customers in fact mostly welcomed the service. The conversion rate from enquiries to inspections was 59%. Typical comments after fulfilment were 'excellent service', 'practical', 'helpful' and 're-assuring'. Nevertheless, for a similar service to cover its costs would require at least greater economies of scale and more marketing. Most importantly, it would require a climate of official help and support and fiscal policies more favourable to maintenance.

The Pilot was grant-aided by the Bath Preservation Trust, the Esmée Fairbairn Foundation and English Heritage, who were keen to see the innovative trial take place and for the experience to be disseminated.

The Pilot was pioneering. Valuable lessons have been learnt that are already informing similar emerging initiatives in the UK and should be central to the development of a national maintenance strategy.



Maintain our Heritage (MoH) has produced this report to share experience, inform and stimulate debate and encourage further initiatives to promote maintenance.

This report outlines the experience of the Bath Area Pilot 2002-03, the first maintenance inspection service for historic buildings in this country. It sets out the main facts, reviews what happened against the aims and summarises the evaluation carried out. It begins to draw conclusions and indicates options for the future.

More detailed data about the Pilot will be carried in a Supplement, which will be available on [www.maintainourheritage.co.uk](http://www.maintainourheritage.co.uk).

Note: Because the service was still operating as this report was being written some data does not cover the entire scheme. For complete data, please refer to the Supplement.

### What the Pilot tested

- Defining a service
- Legal issues
- Insurance issues
- Skills/experience/training needed for inspectors
- Equipment needed
- Inspection method
- Scope for minor work during the inspection
- Nature and extent of work identified by inspection
- Range of building types
- Access
- Health & safety
- Management and administration
- Marketing
- Demand
- Costs and resources needed
- Customers' attitudes and practices
- Re-inspection
- Inspection by contractors.

# 02

## THE STORY

### Origins 1998-99

The Pilot was the first initiative of Maintain our Heritage; MoH originated from a national seminar in 1998 to promote the 25th Anniversary of Monumentenwacht, an organisation in the Netherlands that makes annual maintenance inspections of historic buildings<sup>1</sup>. Since it was founded in 1973 by two individuals, it has built up to 52 two-person teams inspecting 15,000 buildings – a fifth of all listed buildings in the Netherlands.

The seminar inspired MoH – which came into being as an organisation the following year – to develop a scheme for the UK. MoH, however, did not simply replicate the Monumentenwacht model. The Dutch context is different and MoH devised its own maintenance inspection service. In particular the Monumentenwacht service is subsidised and there is a fiscal incentive to owners to subscribe.

### Planning 2000-02

After forming and consulting its Advisory Panel, scoping the service, estimating the resources it would take and exploring funding possibilities, MoH drew up a business plan in 2000.

In 2001, Bath Preservation Trust was the first body to commit funding to the Pilot. Esmée Fairbairn Foundation then made a grant to help MoH to prepare for and run the scheme. MoH carried out a trial inspection of a building in Bath to pave the way to the Pilot.

By early 2002, MoH had successfully defined the service, resolved legal and insurance problems, recruited a manager and inspector, prepared a flier, purchased equipment, and much else. MoH was ready to go but two uncertainties remained. Demand was one, there being no precedents to gauge from and there being no resources for market research. The other was funding, the funds on the table being insufficient to see the Pilot through as planned. English Heritage did not immediately commit support.

### Pilot phase one April 2002-February 2003

Marketing of the service began in April 2002 and the first inspection was made in June. English Heritage awarded a Heritage Grant in August.

The area selected was the Bath & North East Somerset local authority area. 61 enquiries were made leading to the inspection of 44 buildings in this phase, but demand was slower than anticipated. The Pilot in fact was originally planned to run for six months but the gradual take up prompted MoH to extend it into 2003, expanding the area to bring more inspections and a wider range of locations, buildings and customers. There was a brief hiatus in January/February while funders were consulted and new literature prepared, this time including testimonials from phase one customers.

### Pilot phase two March-October 2003

Marketing began again in March 2003, extending to within some 40 miles of Bath. 41 enquiries were made leading to 28 buildings being inspected in this phase – and the target of 72 being passed. The limited nature and funding of the Pilot meant that the service had to close to new business at the end of May after just three months of the second phase. There was a sense of accumulating interest towards the end and further business had to be turned away after May. The relatively heavy casework in the system at the end of May and the difficulty of scaling up the capacity meant that the final inspection reports were not issued until November.

### Evaluation, Report and Dissemination

**November 2003-**  
Under way

<sup>1</sup> An outline of this and two other European initiatives can be found in [Best Practice Maintenance Management for Listed Buildings](#), University of the West of England for MoH September 2003: see Section 11.

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## THE SERVICE

The service offered customers:

- an inspection of areas critical for maintenance by independent historic building advisers;
- a report, in layman's terms and with digital photographs, on priorities for maintenance work;
- an explanation of the report in person; and
- the carrying out of a limited amount of first-aid on-the-spot, temporary repair where small, but critical, areas of disrepair were encountered during the inspection.

The scope of the inspection was broadly limited to the external envelope. The rationale was to concentrate on those elements that protect the building from water and damp penetration:

- Roof coverings (including flashings to abutments); gutters, down-pipes and associated rainwater goods; external wall surfaces and joinery; and drains;
- Internal roof void for any evidence of water ingress and attendant fungal or insect attack;
- Internal areas where maintenance problems are identified in the external walls and/or joinery; and
- Drains and inspection chambers by lifting drain covers.

The service was available for listed buildings of all types, irrespective of ownership.

Before the inspection<sup>2</sup>, prospective customers received a visit from MoH to assess the size of the building concerned and whether there were any access or health & safety problems. Following this MoH sent a written quotation giving a price for the service.

The sequence in each case was thus:

- 1 Enquiry
- 2 Pre-inspection visit (no charge, no obligation)
- 3 MoH issues quotation in offer letter
- 4 Customer accepts quotation
- 5 Inspection
- 6 MoH issues report
- 7 Post-inspection consultation (if requested by customer).

The service was independent and no professional advisers or contractors were put forward. The building work recommended in the inspection report was entirely the responsibility of the customer.



<sup>2</sup> MoH preferred the terms 'inspection' to 'survey' and 'inspector' to 'surveyor'.

## AIMS AND ASSUMPTIONS

The Pilot was planned to achieve a number of aims and test a series of assumptions developed by MoH. The main ones are listed here in tabular form, together with an assessment of the key results in each case.

**Assumptions and aims** Findings MoH assessment October 2003

Source: MoH Bath Pilot Business Plan March 2002	Experience/issues at set-up stage	Experience/issues to emerge during operational phases	Modifications made in light of experience	Final assessment and additional comments
To gain practical experience of the establishment and operation of the service	Service established	No major problems emerged	No major changes made	Service operated successfully
There are no insuperable access, health & safety, legal etc issues which render the service as proposed impractical	No issues prevented the service from going ahead though professional indemnity insurance problematic and disproportionately costly	Health & safety policy put in place but issue of safe working at high level not fully resolved. Harness of limited value in practice as few safe points of attachment	Alternative access methods tried – see Section 5	Health & safety need has to be balanced with a valued inspection service provided at an affordable level. Safety cannot be compromised; therefore the service will inevitably be limited in certain areas
Experienced, trained, craftspeople can provide the service	Suitable crafts inspector identified	First inspector left. Two suitable inspectors found subsequently (both had a surveying background). Vulnerability of service based on one inspector	None	This assumption not fully tested within limited scope of Pilot
The inspectors can do worthwhile emergency repairs	Service defined to include limited first aid work	Inspectors made minor repairs, cleared gutters & gulleys, removed vegetation, cleared flat roofs & courtyards	None	Aspect of service particularly valued by customers. Some buildings too large for work to be done in time available

continued

**Assumptions and aims** Findings MoH assessment October 2003

Source: MoH Bath Pilot Business Plan March 2002	Experience/issues at set-up stage	Experience/issues to emerge during operational phases	Modifications made in light of experience	Final assessment and additional comments
A sufficient number of owners will want the service and be prepared to pay for it (though in this pilot we do not expect to recover the economic price to enable the service to be provided without subsidy – by MoH or anyone else eg the private sector)	Target set of 72 buildings in 6 months. Scale of charges set at £150 – 250 for most (a few larger buildings to be more)	Take up slower than anticipated. Marketing spend some £100 per inspection – see Section 8	Period extended from 6 to 12 months. Concessionary charge of £50 for most places of worship introduced	Target hit. Charges do not meet even marginal cost
To promote the concept of maintenance (to DCMS, EH, HLF, Amenity societies, Trusts, Estates, public and private individual owners, educational institutions, and the media)	Literature outlined benefits of maintenance	The Pilot encapsulated the concept at national and international conferences, in press coverage, articles, radio (Today, You and Yours)	Later literature carried testimonials from customers	Pilot helped to get across broader maintenance messages and will continue to be used by MoH in its continuing role in promoting maintenance
To obtain case studies and materials for the promotion of maintenance	Questionnaire designed to gather data post report	17 questionnaires returned (40%) – see Section 9	None	Data and anecdotal evidence obtained. Case research could be taken further at a later date eg to find out what repairs made/not made; whether subsequent inspection etc
To assess the feasibility of a permanent service in the area and identify the resources needed to launch such a service	Pilot designed to be monitored, evaluated and written up	Data gathered and published about buildings and owners but full picture of demand not achieved	None	Service shown to be practicable. Clarified resources needed

MANAGEMENT AND  
TECHNICAL ISSUES

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**Direction.** The MoH Board (meeting monthly) was responsible for the Pilot. The Board delegated direction of the Pilot to two Board members in the area (meeting weekly): Nigel Dann (Senior Lecturer and researcher, University of the West of England) and Tim Steene (Divisional Director, Mouchel Parkman; formerly Director of Projects, South West Region, English Heritage).

**Manager.** MoH sought a candidate to develop the service, be the central point of information, and undertake promotional activities who had an understanding of building conservation and personnel and general management skills. MoH appointed Timothy Cantell (a heritage consultant and a founder of SAVE), who was already MoH's Project Coordinator, to be Manager of the Pilot. He was engaged on a part-time self-employed basis and also continued in his Project Coordinator role.

**Inspection team.** Three Inspectors were used:

Roland Billington

[59 inspections: June 2002-October 2003](#)

Trained as a building surveyor, had experience of working with historic buildings and completed his Masters in Historic Conservation at the University of Bath in 2002.

Rene Rice

[9 inspections: June 2002 & July/August 2003](#)

Craftsman working as Kervaig Conservation, formerly with St Blaise.

Dan Thomas

[4 inspections: September-October 2003](#)

Building Surveyor with Mouchel Parkman.

MoH sought candidates with multi-crafts skills, experience of working on a variety of historic buildings, physical and analytical ability to carry out investigative inspections, a good level of written and oral communications skills and enthusiasm for the concept. Suitable inspectors were recruited by head-hunting and recommendation; no advertising was used. Some other craftspeople asked to be involved.

The Inspectors recruited their own Assistants to work with them on inspections (for which a team of two was essential for health & safety reasons). Those recruited did not have to possess suitable experience though in fact most did. They were a mix of Masters in Historic Conservation students, building labourers, retired and 'resting' professionals and others.

Inspectors and their Assistants were self-employed and used as needed. MoH was fortunate that individuals were willing to be available on this basis with no flow or work guaranteed.

**Training.** None of the Inspectors used required core training in building or conservation matters because they had adequate knowledge and experience. The training organised was use of harnesses, asbestos awareness and a customer's own asbestos course. MoH also provided continuous training in the techniques of inspecting and report writing.

**Equipment.** The inspection team was provided with:

- Folding ladder
- Harnesses and blocks
- Lantern and headlights
- Dustpan, brush, rubbish bags, dust sheet
- Protective gloves
- Binoculars
- Digital camera
- Clipboard
- Flashband, tiles, slates.



continued

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**Access.** Most inspections were carried out using MoH's limited range of equipment. In all but a few cases this was adequate. Exceptions were, for example, a town house with no access to the central valley of a roof and where there was no safe means of climbing over and into the valley; in this case the report explained what areas had not been inspected. In some instances, longer ladders were obtained. Roped access, a mechanical access platform or 'cherry picker' and a mast-mounted camera were used once each and enhanced the inspections. But they were cumbersome to set up and too costly to use frequently. Nevertheless roped access (provided by Wallwalkers) was particularly valuable: it enabled the inspector to see otherwise inaccessible areas close up, especially integral gutters (clogging not apparent from below) and flashings (appeared satisfactory from below but close inspection showed they were not chased into wall). It also overcame health & safety problems involved in high-level activity. A possible route for future services would be to train and equip inspectors to use this method. A cherry picker was similarly valuable but contingent on suitable vehicular access close to the building.

**Insurance.** Professional indemnity insurance was problematic to set up though cover was obtained. Brokers wanted to classify the service in ready-made categories such as 'surveys' or 'building works' though the service straddled these and was not congruent with either. The cover obtained was contingent on every report being signed off by an RICS or similar professional (in fact, MoH would have arranged anyway for each report to be vetted before issue). The cost at £1,260 a year (indemnity £1m; excess £1,000) was high in relation to the scale of the Pilot. The first year of run off cost £1,050.

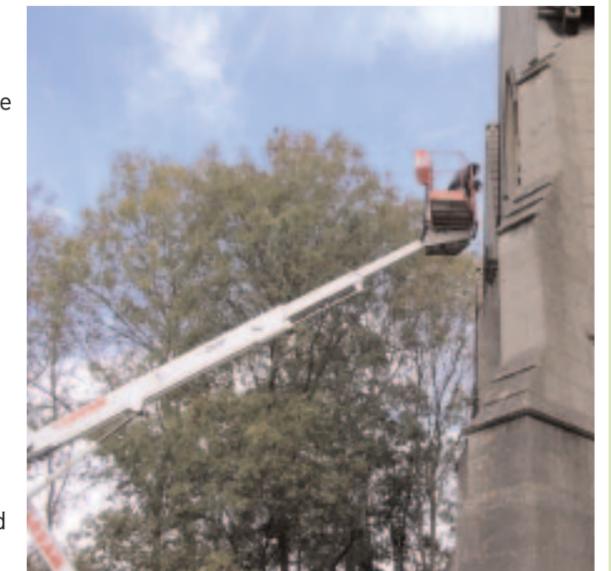
Public and employer's liability insurance was straightforward to set up at reasonable cost. 'All risks', tools, phones, and personal accident cover were not sought.

**Health & safety.** A Health & Safety Policy was provided by consultants though some modification was necessary (to adapt policy for typical site requirements to specialist survey activities) before it was adopted. The issue of protecting operatives working near edges at high level continued to pose problems; where such work is considered a risk then either that part of the building is not inspected or specialist access assistance is arranged.

**Time.** A typical inspection, say a four-storey terraced house, took 4-5 hours on site for the Inspector and Assistant; report writing (Inspector only) a further 5-6 hours (all figures excluding travel).

**Legal.** Advice was taken as to the scope of the inspection, how it was to be defined in the offer letter (ie contract) and how to minimise the risk of claims arising.

**Contractor.** MoH invited a respected local contractor to undertake inspections of two buildings (already inspected by MoH) and to devise their own method within MoH's broad approach. The resulting inspection reports were brief and drew attention to work that the contractor could undertake. The contractor initially expressed interest in the Pilot and a possible commercial (or at least loss leader) successor, but had, by the end of the Pilot, not developed the idea further.



**Income.** MoH raised external finance to make the Pilot possible. MoH, a not-for-profit voluntary group, brought only slender resources to the Pilot; it had no employees and no funding other than that for specific projects.

The external funding for the Pilot totalled £64,000:

- Bath Preservation Trust offered £100 per inspection for the first 30 inspections: a total ultimately of £3,000;
- Esmée Fairbairn Foundation made a grant of £30,000 to help MoH to prepare for and run the scheme. £8,000 of this was set aside for a pre-pilot trial inspection, set up costs and overheads; £22,000 went forward to the Pilot itself; and
- English Heritage awarded a Heritage Grant of £39,000.

Charges to customers varied according to the size and complexity of the building (as assessed on the pre-inspection visit): the range was £150-700. 69% were charged £150-225 (excluding places of worship which were offered a reduced rate of £50 from October 2002 after none had come forward at standard rates).

The amount received from customers to September 30 2003 was £8,303 (£9,756 including VAT). The final total is projected to be £15,869 (£18,646 including VAT) – 20% of the total income of £79,869. The Pilot was thus heavily subsidised. However, the Pilot was not intended primarily to test the commercial viability of the service and the charge to customers was nominal compared with the actual cost of providing the service – see below.

**Expenditure.** The principal items of expenditure were:

	£ 000.0s	%
Management/administration/office	28.4	35.7
Inspection teams	16.3	20.5
Report, conference & evaluation	8.2	10.3
Marketing	6.9	8.7
Overheads	4.7	5.9
Insurances	4.4	5.5
Equipment & materials	3.1	3.9
Training	2.3	2.9
Travel	2.1	2.6
Health & safety	1.5	1.9
Legal, accountancy	0.9	1.1
Other	0.8	1.0
<b>Total</b>	<b>79.6</b>	<b>100.0</b>

Projected totals at 30 September 2003

Expenditure on Management/administration/office was high. This covered the cost of providing an office. It also reflects the challenge of setting up a Pilot with no UK model to adapt which meant that tackling issues such as definition of service, insurance, health & safety was time-consuming.

Fixed costs (Management etc; Marketing; Overheads; Insurances; Equipment etc; Training; H&S; Legal etc) amounted to some £60,000 or 75%. Variable costs (Inspection teams; Travel; etc) amounted to some £19,000 or 24%.

The average cost of each inspection was over £1,100 and marketing alone almost £100 per inspection. To cover the costs without subsidy, the charge to customers would have to have been prohibitively high. The marginal cost of each inspection, however, was of the order of £300, not so distant from the average revenue.

Although the Pilot was not a commercial trial, it can be estimated that if the number of inspections had been say 146 (not 73) then the fixed costs would have increased only slightly: (more Management, Marketing etc) say by £9,000. Variable costs would have increased: say by £13,000. Even then the average cost of each inspection would fall only to some £700<sup>3</sup>.

**Resources.** The Pilot had the benefit of the voluntary services of MoH Board members, the guidance of the MoH Advisory Panel, help from Bath Preservation Trust and English Heritage (the latter including technical help from Tony Leech of the South West Region) and advice from Bath & North East Somerset Council.

<sup>3</sup> The case for new businesses is analysed in a report for MoH to be published shortly (see section 11).

The 73 buildings inspected ranged from city flats to village cottage; from guest house to museum; from the church with fourth tallest spire in England to a cross on a village green; from modest terrace to celebrated works by Blomfield (Arthur and Reginald) and John Wood.

### Buildings inspected by building type

Building type*	#	Notes
Urban residential detached	7	
terrace/semi-detached	30	3 converted: 2 museum/heritage attraction, 1 guest house, 4 multi-occupied
Rural residential cottages	2	
houses	4	
country houses	3	
Churches	10	
Chapels, meeting houses	4	2 converted: museum, educational; 1 recently acquired by National Trust
Educational	7	
Outbuildings, mews	3	
Other	3	Hotel converted to museum; walls; cross on village green
<b>Total</b>	<b>73</b>	

\*ie original purpose (not current use)

One measure of the value of the inspections is the number and nature of items identified by the inspectors in the reports. Over 40 items were set out on average per report and of these 7 were urgent.

### Recommendations for work in inspection reports, by priority

Priority Category	Work should be done	Number #	Ave
A	- immediately	45	0.8
<i>Examples:</i> Repair broken tiles, renew decayed stone to parapet wall, repair defective flashings & missing mortar at junction of parapet wall/roof, provide ventilation to roof void, secure gas pipe to boundary wall.			
B	- within the next six months or before winter	369	6.5
<i>Examples:</i> Renew flaunching to all chimneys, provide wire mesh over outlet, repair cast iron S-bend down pipe, replace corroded metal tingles holding glass panels, replace corroded metal tingles holding glass panels, provide lead adjacent to copings & clay ridges			
C	- within the year	980	17.2
<i>Examples:</i> Refix loose iron railings into columns, repoint defective mortar to chimney stack, provide edge protection/toughened glass so operatives can work safely on roof, renew blown render to parapet wall, overhaul access door to tower			
D	- as part of a regular maintenance programme	1,094	19.2
<i>Examples:</i> Check timber for decay; look for bore dust on floor, monitor condition of softer sandstone to nave and north aisle, any replacement rooflights should be thermally efficient to prevent condensation internally			
<b>TOTAL</b>		<b>2,488</b>	<b>43.6</b>

Data from 57 inspection reports at 30 October 2003

Work done on site at the same time as the inspection was typically clearing debris and vegetation from gutters, secret gutters, gullies, outlets, hopperheads, flat roofs and courtyards; and occasionally fixing a skewed slate or replacing a broken one and various flashband temporary repairs.



## MARKET AND MARKETING

Testing marketing techniques was not a key objective of the Pilot, but it nevertheless produced some pertinent findings.

In the Pilot promotional literature, MoH said that maintenance:

forestalls deterioration. It makes sense, for example, to clear gutters or to fix a slipped tile – in order to prevent damp causing damage that would spread and have to be put right at great cost sooner or later. The money spent year by year on prevention is far less than the cost of recovery; and

safeguards the historic fabric because less material – if any at all – is lost in regular, small-scale repair than in eventual, extensive rescue. The avoidable loss of fabric through neglect diminishes the value of the building and wastes resources.

From the customer's point of view, MoH pointed out:

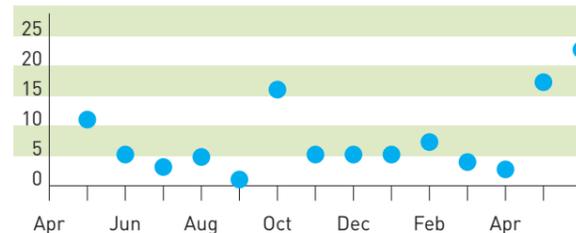
You could save money by having your building checked. By getting early warning that work needs doing, you will be able to put matters right at far less cost than if things deteriorate and have to put right later on.

Fliers were the main medium and they were distributed principally through dedicated mail shots (including to over 5000 listed buildings), but also as inserts, door-to-door drops and display in libraries etc. Some use was made of advertisements in local newspapers and property magazines.

102 enquiries (some for more than one building) were received about the service over 14 months. The response rate was less than 0.5%.

The flow of enquiries reflects the timing of marketing initiatives especially the mailings in April 2003 using a new flier that included testimonials from earlier customers.

Enquiries by month 2002-03



The most successful single marketing initiative was a mailing kindly undertaken by the Gloucester Diocese of the Church of England who sent a supportive letter to 54 churches to which 8 (15%) responded within a tight deadline. Places of worship were offered a special rate of £50 per inspection.

Word-of-mouth recommendations also worked well, both through: partners and colleagues (University of the West of England, Bristol 12; Bath Preservation Trust 3; National Trust 1); and it appears through customers – there were clusters of enquiries from certain streets in Bath (eg 4 in Royal Crescent but none in The Circus).

Of 102 enquiries, 5 were ineligible, 7 did not proceed to a pre-inspection visit and 30 had a visit but did not proceed to order an inspection. The remaining 60 (73 buildings) used the service. In the case of the Gloucestershire churches (see above), 7 (87%) of the 8 ordered an inspection. The conversion rates were thus:

- enquiries to visits 88%
- visits to inspections 67%
- enquiries to inspections 59%.

The slow take up in some ways was not a surprise and was in many ways understandable. Given that research shows that most owners act only when a problem is evident (eg damp patch on the ceiling), a concept, preventive maintenance, had to be sold before the product itself could be sold. The Pilot was operating in barren ground with low awareness and no national encouragement or incentives for maintenance. Maintenance is an activity of low status to most owners and professionals.

Also, within the confines of the Pilot's limited resources a year was not a long period in which to soften up a market and sell a new product; nor was there time for interest to build gradually to a critical mass. Schemes in Holland and Denmark also experienced slow starts.

Cost, even at the rates charged, appeared to be a factor; 73% of owners' were interested in an independent inspection service according to research commissioned by MoH but 22% would not be willing to pay and a further 37% were willing to pay only up to £100 (see Section 11).

## CUSTOMER FEEDBACK

Customers who gave comments were mostly positive about the service. 90% thought the service had been useful and 95% said they had or would undertake/commission work as a result. Two respondents previously had some kind of regular inspection (one a church quinquennial) though 60 % said they cleared gutters regularly. Just one wished to reduce the scope of the service inspection and 35% wished to add to it – mostly wanting recommended contractors. 70% found the report easy to understand and all but one (who wanted a longer) said the length of the report was all right. 70% would use such a service in a year's time while others suggested a longer interval. (Data from 20 questionnaires returned at 30 October 2003 out of 42 issued (48%)).

Typical favourable comments were:

The survey has been invaluable in assessing the current state of the building and will be a great assistance in future maintenance

We were very pleased with our report. Many thanks for the excellent service

The reports have provided us with a helpful and concise forecast of the immediate to long-term maintenance required at our historic properties, allowing us to budget for a realistic maintenance programme

It is useful to have a comprehensive list of items which I should attend to, and re-assuring to know that there is nothing urgent that I have overlooked

A rigorous inspection which touched upon aspects of the building that were not highlighted during the purchase survey.

Unfavourable comments were few, but examples were:

The service could be improved by indicating not only urgency but also importance/effect ... and by suggesting in broad terms what to do about problems

Over-cautious – cut out the caveats

Because there is no access to the rear parapet the cause of bathroom ceiling leaks cannot be ascertained so on this we are no further forward.

As to those who enquired but did not proceed to a pre-inspection visit, some were ineligible (eg outside the area, building not listed) but most had misunderstood the service (eg were seeking grants, thought it was a makeover, curious but had survey done on recent purchase).

As to those who had a pre-inspection visit but decided not to order an inspection, the main reason given was that they had some kind of regular check already, had had a survey or major works done recently or wanted more than just an inspection. Typical comments were:

We are carrying out condition surveys of these premises which cover the aspects described

It is a disadvantage that ... you do not offer access to some guaranteed services so that flaws can be put right.

## EVALUATION

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The Pilot is being evaluated by Stephen Bond (Director, TFT Cultural Heritage; Partner, Tuffin Ferraby & Taylor; former Surveyor of the Fabric, Tower of London; expert on maintenance management). His work is not complete and this is a summary of the first of two reports he is preparing:

The Pilot has been highly successful in delivering a service that meets with its customers' expectations in terms of quality and value for money. It has also raised the profile of maintenance in the locality and amongst organisations associated with the care of historic buildings.

Despite these major successes, it has been less successful in proving the robustness of its starting assumptions, in our view. Of 9 starting assumptions, we have concluded that 6 remain unproven after completion of the Pilot:

Experienced, trained craftspeople can provide the defined service;

Suitable craftspeople are ready, willing and able to carry out the service on terms and conditions that MoH can afford;

The inspectors can be trained satisfactorily and MoH can provide suitable 'proof of learning';

The quality of the inspectors' work can be supervised so that they achieve a consistently acceptable standard;

A sufficient number of owners will want the service and be prepared to pay for it;

Suitable private builders and professionals exist to whom owners can be referred and will accept such referrals;

and the other three assumptions have only been validated in limited respects:

The productivity of the inspectors is as planned, and is not subject to factors (eg travelling time, reliability of inspectors, vehicles, owners, etc) which make the service inherently uneconomic;

The inspectors can do worthwhile emergency repairs;

There are no insuperable access, health & safety, legal etc issues which render the service as proposed impractical.

The achievement of the Pilot's aims has been slightly better: of 9 stated aims, we have concluded that three have been met in full:

To gain practical experience of the establishment and operation of the service as defined;

To promote the concept of maintenance (to DCMS, EH, HLF, Amenity societies, Trusts, Estates, public and private individual owners, educational institutions, and the media);

To obtain case studies and materials for the promotion of maintenance;

three have been partially fulfilled:

To identify successful marketing techniques needed to launch a permanent service;

To assess the feasibility of a permanent service in the area and identify the resources needed to launch such a service;

To provide training opportunities for MoH's own operatives if needed to launch a permanent service;

and three have not been satisfied:

To validate key assumptions made by MoH;

To provide hard evidence that these assumptions are valid, ie so that MoH can demonstrate to other bodies that they are valid – not merely to MoH.

To promote the continuation of the service by obtaining lists of building owners interested in becoming customers of the scheme if it becomes permanent after the trial.

## THE PILOT AND MoH RESEARCH

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MoH has led a wide-ranging research programme into maintenance issues, [Maintaining Value](#), alongside the Pilot. Funded by DTI, English Heritage the Heritage Lottery Fund and others, it aims to test the hypothesis that systematic maintenance is the most sustainable and cost effective way of looking after the fabric of historic buildings. The findings are coming out in late 2003 and the programme will culminate in a report in early 2004. The research will analyse the benefits of maintenance for building owners and will examine the business case for new maintenance services.

The experience of the Pilot has been fed into the research. Equally, the results of the research will inform discussions about possible future initiatives whether inspection services or other ways of encouraging or facilitating systematic maintenance in practice.

There are seven research modules. Of particular relevance to this Pilot Report are #1 on Best Practice which includes an outline of Monumentenwacht and other European initiatives, #2 on Individual Owners and #5 which used data from the Pilot in assessing the case for new businesses.

The reports will be published on [www.maintainourheritage.co.uk](http://www.maintainourheritage.co.uk) as below:

Module #	Title /subject	Research undertaken by	Report available
1	Best Practice Maintenance Management for Listed Buildings	University of the West of England	November 2003
2	Individual Owners' Approaches to the Maintenance of their Listed Buildings	University of the West of England	November 2003
3	The Provision of Commercial Maintenance Services for Listed Buildings	University of the West of England	November 2003
4	Technology	Arup Research and Development	December 2003
5	Case for New Businesses	Arup Research and Development	December 2003
6	Training and Education	De Montfort Expertise Limited (for Arup Research and Development)	December 2003
7	The final report of the project – Synthesis of modules 1-6	Maintain our Heritage	February 2004

## CONCLUSIONS

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The Bath Area Pilot set up by MoH showed that it is possible to establish and operate a maintenance inspection service. It successfully validated MoH's key assumptions that there were no insuperable technical problems to such a service. It also demonstrated that such a service could be valued by building owners. Indeed, MoH's belief that systematic maintenance leads to a saving of money and resources and helps safeguard our heritage has been reinforced by the response of many Pilot customers.

The Pilot was made possible only by support from Bath Preservation Trust, Esmée Fairbairn Foundation and English Heritage who all believed the Pilot was worth backing as a worthwhile practical exercise. Much has been learned, positively and negatively, and this report and the available Supplement will be valuable to any organisation, whether commercial or not-for-profit, contemplating a similar service.

After years of discussion and aspiration by many about maintenance, MoH has gone out and set up a service and had dialogue with real people about real buildings.

Plainly, however, the Pilot was costly and the market would not have accepted charges of £1,000 or so per inspection, had there not been external funding. Such a subsidy is clearly not sustainable. The cost base no doubt could be reduced in a full scheme and could be spread over a far larger caseload. A commercial operator would bring many advantages such as marketing expertise. Even then though the Pilot does suggest caution in envisaging a profitable service at a charge that customers will pay.

Following the Pilot, MoH will be reviewing both the Pilot and findings of the broader research it has commissioned, and discussing options with its partners and others.

Among possibilities to be discussed are:

- To combine a maintenance inspection service with related elements such as boiler servicing, drainage protection;
- To enhance a maintenance inspection service as the centrepiece of a subscription home or building care package;
- To incentivise a maintenance inspection service with a discount on buildings insurance; and
- To provide a maintenance inspection service as a condition of a mortgage or insurance policy.

There also appears to be scope for a not-for-profit maintenance inspection service targeted at particular sectors such as places of worship, if supported by some level of subsidy.

Importantly, there are other ways of fostering better maintenance practice. The major national heritage bodies could encourage maintenance more pro-actively for example and advice and information about maintenance should be more readily available.

The overarching finding is that the widespread development of such a service, or similar commercial services, is likely to be possible only as part of a comprehensive national maintenance strategy that provides wide-ranging official support, advice and encouragement for maintenance. Experience in other countries has demonstrated that financial assistance is fundamental, whether it be grant aid for maintenance work, the reduction of VAT on repairs and maintenance or tax concessions for maintenance. An initiative would be more likely to succeed if maintenance was part of the record in owners' handbooks or sellers' packs and if there was a more explicit obligation on owners to look after their listed buildings.

MoH now invites discussion of the Pilot, what is to be learned, and what initiatives should now be framed – whether to be carried out by MoH or others. The results of this discussion will be published in due course.

## THE SUPPLEMENT

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This report offers a summary of the Pilot and what was learned.

For more detailed data about the Pilot please see the Supplement to the report. The Supplement will be available on [www.maintainourheritage.co.uk](http://www.maintainourheritage.co.uk).



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