

Historic building maintenance
A pilot inspection service
The Bath Area Pilot
mounted by Maintain our Heritage in 2002-03

SUPPLEMENT
to the printed report

April 2004

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1 Introduction

Maintain our Heritage (MoH) undertook the Bath Area Pilot, the first maintenance inspection service for historic buildings in the UK, in 2002-3.

The report, *Historic building maintenance - A pilot inspection service*, giving a summary of the Pilot and what was learned, was published in November 2003. The report is available at <http://www.maintainourheritage.co.uk/pdf/pilot.pdf>].

This Supplement gives more detailed information than the report.

Because the service was still operating as the report was being written some data did not cover the entire scheme. This Supplement therefore also up-dates the data in the report.

2 Additional casework statistics

2.1 Recommendations for work in inspection reports, by priority

[Note: this up-dates the table on page 11 of the report]

Priority		Number		Examples
Category	Work should be done	#	Ave per rpt	
A	- <i>immediately</i>	50	0.7	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	- <i>within the next six months or before winter</i>	439	6.0	Renew flaunching to all chimneys Provide wire mesh over outlet Repair cast iron S-bend down pipe Replace corroded metal tingles holding glass panels Provide lead adjacent to copings & clay ridges
C	- <i>within the year</i>	1349	18.5	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	- <i>as part of a regular maintenance programme</i>	1387	19.0	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
Total		3225	44.2	

Data for all 73 reports

2.2 Time requirement for three typical inspection types

	On site Inspector and Assistant	Report writing Inspector only	Total
Terraced house (four-storeys)	4-5 hours	6-7 hours	10-12 hours
Village church	5-6	6-7	11-13
Large detached house	5-6	8-9	13-15

all figures excluding travel and pre-inspection visits

2.3 Charges to customers

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. Typical charges for four inspection types:

	£
Cottage or 2-storey house	150-175
Terraced house (4-5 storeys)	200-225
Large detached house	225-275
Country house	300-400

Places of worship were offered a reduced flat rate of £50 from October 2002 after none had come forward at standard rates.

3 Additional marketing statistics

[Note: this adds detail to page 12 of the report]

3.1 Marketing undertaken

Phase 1 (April 02 – February 03)

- leaflet mailed to 2513 listed buildings
- press release to local media
- advert in the *Bath Chronicle*
- advert in the *Bath magazine*
- leaflet as insert in two mailings to Bath Preservation Trust members
- editorial mentions in *Bath Chronicle*, *Bath magazine*, Bath Preservation Trust *Annual Report* and elsewhere
- mailings to target groups e.g. residents associations, property managers
- telemarketing to target groups e.g. chapels, property managers
- leaflet drops
- notices in village shops, bulk leaflets to libraries etc.
- SPAB Maintenance Week 2003:
 - Local coverage of photo shoot for National Gutters Day
 - BBC Radio 4 *You & Yours* item on maintenance featuring the Pilot

Phase 2 (March – October 03)

- mailing to those in the area who contacted the BBC following the *You & Yours* piece and then contacted MoH
- leaflet mailed to 2951 listed buildings
- leaflet mailed to places of worship that had received grants; also mailing by Diocese of Gloucester to churches in south of Diocese
- leaflet mailed to places of worship, HHA members and others
- leaflet as insert in mailing to Bath Preservation Trust members
- articles in local magazines and Bath Preservation Trust Newsletter
- advert in the *Bath City Life*
- web sites e.g. buildingconservation.com
- editorial mentions in *Bath Chronicle*, *Bath magazine*

leaflet drops
bulk leaflets to libraries etc.

3.2 How customers heard about the service

Principal factor mentioned by those who ordered an inspection		
How heard	#	Notes
<i>All buildings:</i>		
Mailings to listed buildings	19	Phase 1: 8; phase 2: 10 Response rate less than 0.5%
Partner organisations / Personal contacts	16	University of the West of England 12; Bath Preservation Trust 3; National Trust 1
Local magazine advert*	7	¼ page ad in 2 glossy property magazines. 4 appearances altogether.
Mailings to Bath Preservation Trust	6	BPT has over 1000 members Response rate approx 0.5%
Mailing to previous expressions of interest	4	Mainly BPT members who picked up pre-publicity
Leaflet drop or picked up leaflet	4	
Mailing to <i>You & Yours</i> (see above) respondents	3	
Bath Chronicle advert*	1	Single appearance of small display ad
Total	60	
<i>Churches:</i>		
Gloucester Diocese letter	8	Supportive letter to 54 churches. Response rate approx 15%
Personal contacts	3	

Data for 60 customers (73 inspections)

* 3 feature articles appeared in the same magazines about the service but no one mentioned these ahead of the advertisements.

** 3 news stories appeared in the same paper but no one mentioned these.

3.3 Enquiries post-Pilot

The Pilot ran from April 2002 to November 2003 (see report page 4). The following closure dates applied as part of the winding down of the service:

30 April 2003	Close of promotional efforts
30 May	Closing date for enquiries
30 June	Closing date for pre-30 May customers to order inspections

Thus the last six months concerned only customers already in the system.

From June 2003 to February 2004, 12 enquires were made about the service and had to be turned away (contact details were noted in case any future service is mounted). The 12 included two churches and one rural estate.

From July, in addition to the enquiries, 3 customers who had previously had a pre-inspection visit and been offered an inspection came forward to order an inspection. They also had to be turned away.

Also a number of customers who did have an inspection enquired about a subsequent inspection.

4 Questionnaires from customers

Every customer was sent a questionnaire with their inspection report.

	# questionnaires issued	# response	%
Secular buildings	48	26	54
Places of worship	12	7	58
Overall	60	33	55

This analysis of the data from the responses is split into two sections:

4.1 Secular buildings

What made you decide to use the service?	#	%
Wanted to have building inspected to see if anything needed doing	12	46
Aware of problems and wanted to find out what needed doing	12	46
Having building work done and wanted to know if anything else needed doing	1	4
Other	1	4
Total	26	100

Had the building been inspected before to assess general maintenance requirements (as opposed to immediate known repair problems)?	#	%
Yes	11	42
No	15	58
Total	26	100
If 'Yes', how long ago?		
This year	1	10
Last year	2	20
2 years ago	1	10
Several years ago	6	60
Total	10	100
.. and who did the inspection?		
DIY	2	18
Specialist maintenance firm	1	9
Architect/surveyor	7	64
General building contractors	1	9

	Total	11	100
and was it regular?			
Annual		0	0
Occasional		5	45
One-off		6	55
	Total	11	100

Which better describes how you look after your building:	#	%
I have a builder/surveyor/architect/ who gives it a periodic inspection	2	8
I call in a builder when I know there is a problem	24	92
	Total	26
		100

Do you regularly undertake or arrange any of:	#	%
Inspection/clearance of gutters, downpipes etc.	15	58
Drain clearance	15	58
Painting of external woodwork	21	81
Replacement/refixing of roof tiles/slates	12	46
	Total response (63 items)	26
		<i>n/a</i>

When did you last call in a builder/surveyor/architect?	#	%
This year	9	37
Last year	5	21
2 years ago	7	29
Several years ago	3	13
	Total	24
		100

As a result of this inspection by MoH, have you commissioned or undertaken work or do you intend to do so shortly?	#	%
Yes	26	100
No	0	0
	Total	26
		100
If 'Yes',		
Have commissioned work	5	19
Have undertaken work	1	4
Intend to commission work	12	46
Intend to undertake work	11	42
	Total response (29 items)	26
		<i>n/a</i>

How useful to you has the service been?	#	%
Very useful e.g. found out important things I wasn't aware of	16	62
Slightly useful e.g. found out minor things I wasn't aware of	9	35
Not useful but still worthwhile e.g. found out little, but reassured nothing major is wrong	1	4
Not at all useful e.g. found out and gained nothing	0	0
	Total	26
		100

Would you add to or reduce the service in any way?	#	%
Add	8	53
Reduce	0	0
(Comment made to the effect that service OK as it is)	7	47

	Total	15	100
(Comments made by those saying 'Add')			
More information on contractors		4	50
More practical information on what to do		2	25
Extend inspection e.g. to cover internal areas		2	25
	Total	8	100

The service involved booking a pre-inspection visit, the visit, the offer letter, booking the inspection, the inspection itself and finally the report. What did you feel about the clarity and efficiency of the process?	#	%
Very good	14	54
Good	8	31
Fair	4	15
Poor	0	0
Very poor	0	0
	Total	26
		100

Did you find the written material easy or difficult to understand?	#	%
Leaflet		
Easy to understand	21	95
Fair	1	5
Difficult	0	0
	Total	22
		100
Offer letter		
Easy to understand	20	83
Fair	4	17
Difficult	0	0
	Total	24
		100
Inspection Report		
Easy to understand	20	83
Fair	2	8
Difficult	2	8
	Total	24
		100

Would you have preferred a longer or shorter report?	#	%
Longer	1	4
Shorter	0	0
OK as it is	24	96
	Total	25
		100

Bearing in mind what you paid, do you feel the service is value for money?	#	%
Very good	16	62
Good	7	27
Fair	3	12
Poor	0	0
Very poor	0	0
	Total	26
		100

If such a service was available a year from now, would you use it?	#	%
Yes and would even consider paying slightly more	4	15
Yes at the same price	9	35
Yes if the price was lower	*4	*15
No	**9	**35
Total	26	100

* 2 said they would be looking for an up-date rather than a full inspection and so would expect a lower price

** 7 said they would prefer a longer interval e.g. every 2-3 years

Our advice is objective and independent. Would you have preferred a service linked to potential contractors?	#	%
Yes	5	20
No	20	80
Total	25	100

How long have you lived in/occupied the building?	#	%
Less than 5 years	6	23
5-10	6	23
11-20	5	19
20+	9	35
Total	26	100

How long do you envisage living/occupying here from now?	#	%
Less than 5 years	2	10
5-10	11	55
11-20	3	15
20+	4	20
Total	20	100

How much do you think your building is worth?	#	%
Up to £200,000	2	8
£200-299,000	0	0
£300-399,000	5	20
£400-499,000	6	24
£500-749,000	5	20
£750,000-1m	0	0
£1m+	7	28
Total	25	100

How old are you?	#	%
18-29	0	0
30s	1	4
40s	4	17
50s	6	25
60s	9	37
70s	3	12
80+	1	4

Tot	24	100
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Are you a member of any of these conservation bodies?	#	%
Bath Preservation Trust	7	41
Other local amenity group	3	18
Local history or archaeological society	6	35
National Trust	13	76
Georgian Group	0	0
CPRE	3	18
Other	5	29
Total response (37 items)	17	n/a

4.2 Places of worship

There were 7 responses: 6 Church of England; 1 Society of Friends. Of the six churches, two were in town/city and four in villages.

What made you decide to use the service?	#	%
Wanted to have building inspected to see if anything needed doing	2	29
Aware of problems and wanted to find out what needed doing	3	43
Having building work done and wanted to know if anything else needed doing	1	14
Other	*1	14
Total	7	100

* 'Have had recent quinquennial inspection but felt possibility of regular annual checks could be worthwhile'

Do you <i>regularly</i> undertake or arrange any of:	#	%
Inspection/clearance of gutters, downpipes etc.	6	100
Drain clearance	4	66
Painting of external woodwork	3	50
Replacement/refixing of roof tiles/slates	4	66
Total response (17 items)	6	n/a

As a result of this inspection by MoH, have you commissioned or undertaken work or do you intend to do so shortly?	#	%
Yes	5	83
No	1	17
Total	6	100

* the non-respondent commented: 'will coordinate repairs with quinquennial due this year'

How useful to you has the service been?	#	%
Very useful e.g. found out important things I wasn't aware of	4	57
Slightly useful e.g. found out minor things I wasn't aware of	2	29
Not useful but still worthwhile e.g. found out little, but reassured nothing major is wrong	1	14
Not at all useful e.g. found out and gained nothing	0	0
Total	7	100

Our advice is objective and independent. Would you have preferred a service linked to potential contractors?	#	%
Yes	2	29
No	5	71
Total	7	100

Bearing in mind what you paid, do you feel the service is value for money?	#	%
Very good	6	86
Good	1	14
Fair	0	0
Poor	0	0
Very poor	0	0
Total	7	100

If such a service was available a year from now, would you use it?	#	%
Yes and would even consider paying slightly more	3	50
Yes at the same price	2	33
Yes if the price was lower	0	0
No	*1	*17
Total	6	100

* 'we have the quinquennial report so this provided another view at mid-term'

5 What non-users and customers have said about the service

[Note: for completeness, the quotes on page 13 of the Report have been consolidated here]

5.1 Those obtaining a quote but deciding not to use the service

In principle your concept is admirable. We have done a great deal of work over the 37 years that we have lived here to maintain the property and we feel we are reasonable in control of matters concerning the external envelope. I inspect the roof twice a year. We feel that we do not have to incur the fee you have to charge

There is really no chance that your survey could tell me anything significant I do not already know or will quickly discover

It is a disadvantage that your inspector seems to have no qualifications and that you do not offer access to some guaranteed services so that flaws can be put right. The idea is good but needs further development

Sadly you are so hidebound by health & safety and legal caveats that it does not strike me as worthwhile to pay £300 for a report which will be so superficial. We have no leaks and have learned a lot about the fabric.

I see the remedial works to be carried out at the time of the inspection are of a very temporary nature and would require further works by a contractor. With regard to the inspection element we are carrying out condition surveys of these premises which cover the aspects described

The barns are in a distressingly poor state which I feel will not benefit from a report limited to the scope of the inspection as detailed in your letter

5.2 Those to have used the service

5.2.1 Secular buildings

Very useful service and very good value for money. I would use it again a year from now

Overall an excellent service. We were very satisfied.

Thank you for the report - we are very pleased with it and the way it was carried out.

We were very pleased with our report and have found it very useful. Many thanks for the excellent service

I found out important things I wasn't aware of. It was good value – in fact I'd consider paying more

Useful report and I have commissioned work as a result. Would have preferred a longer report

MoH inspection spurred some activity which had been put off

I feel determined, once the weather improves, to carry out most of the suggested improvements

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

I am genuinely impressed by the thoroughness of both the inspection and the report. The presentation is so clear for the layman, very easy to interpret, professional and value for money. It gives me confidence to know the problems that will most certainly arise in an old house have been diagnosed and the medicine prescribed. I can feel sure there won't be any sudden disasters and I can now prioritise to resolve the problems I have

Most of us wait until we have a problem with roof or wall and then call in the builder. MoH's pilot scheme enables us to catch the problems before they get serious and damaging. We had an inspection in the autumn, which identified the problems both minor and worse; some we knew about and had intended sometime to tackle! And others were not known and would not have been discovered till they were serious and expensive to put right. The report was practical, detailed and intelligible with recommendations for work prioritised as immediate, within 6 – 12 months etc. Moreover, first aid on clearing gutters, removing vegetation from the parapet etc. was a welcome feature of the inspection. We hope this pilot scheme can be extended and we should continue to take advantage of regular inspections if they become available

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

This seemed to be a rigorous inspection which touched upon aspects of the building that were not highlighted during the purchase survey: very good

The inspections are of excellent quality. The report will enable a diarised priority/action list to be created.

We were aware of many of the important things but presenting them systematically with a priority categorisation is very useful

Very useful to clarify problems and assess critical path for remedies. Many thanks for friendly and efficient attendance to my queries

First, the survey has been invaluable in assessing the current state of the building. Second, the report will be a great assistance in future maintenance

The first aid carried out on my roof during the inspection has been invaluable, keeping me dry while I find a roofing contractor

First aid work much appreciated

Many people, I suspect, are like me, and have a generally poor view of builders. As a result, some low priority items tend to get neglected

The service could be extended by MoH developing a database of specialist repairers which it would be prepared to recommend. This would maintain its independence but add to its usefulness for owners. We would like to know of reputable, reliable cost-effective specialists who could carry out repairs and maintenance

How can we find a reputable builder?

The service's objectivity and independence was most reassuring

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

I believe your service is potentially very valuable for our sort of house where four leaseholders jointly share the freehold and maintenance responsibilities through a management company

It was useful to have a discussion with the Inspector to clarify some points in the report

We felt the service was well balanced. I wish such a service had been available 20 years ago – I think the information you offer now was only available to much grander houses and we made the best use of local builders. Although many builders were skilled, they rarely made suggestions and I think most of us felt that as long as the roof and windows remained watertight all was well!

Owners of listed buildings, like me, should really be obliged by law to look after their buildings, and be subjected to periodic inspection. Without such enforcement, the country runs the risk of some excellent buildings falling into disrepair

5.2.2 Places of worship

Your report is valuable because it is clearly independent and unbiased

The report was especially useful to those with no more than a layman's knowledge of historic churches

Very thorough report. Photographs especially useful

It is most useful to have such a detailed report with priorities for maintenance which greatly helps parish planning. It was a relief to find that there was not any category 'A' work to be done. Much ordinary maintenance work does not attract grants unfortunately and we need grants to maintain this building in a good state

Would like minor maintenance done as part of service as crane would be expensive to hire later

Reports need not cover such things as historical information unless it was relevant to the repair work

If we were financially sound we would start a rolling maintenance programme

Have no income for maintenance. Lettings cover insurance/gas/electricity etc only. May help in money raising. Reassured nothing in 'A' category

I would like to see a list of recommended firms able to carry out the work identified. Then a follow-up inspection to check that the work had been satisfactorily completed

The service has been very useful. We have a quinquennial inspection and I carry out monthly/annual checks but I am no expert

Your annual inspection would be more frequent than we need as we are already coping with general maintenance

In the long run we would need to coordinate with the quinquennial inspection and avoid duplication - we might prefer to have inspections in the other four years just looking at maintenance items e.g. gutters, damage etc

If this service was offered annually you would become aware of problem areas specific to a particular building and the inspection could be centred on those areas. Also the inspection could monitor problems more accurately, thus allowing for more advanced planning and spreading of the work

Appendix 1: Definition of service

[Extracts from contract letter sent to customers]

Our aim is to produce a report on maintenance action priorities that enables you to commission or undertake appropriate maintenance activity.

This service will be based on the results of a limited visual inspection of:

The maintenance critical elements of the external envelope of the building. By this we mean primarily those elements that protect the building from water and damp penetration:

- Roof coverings (including flashings to abutments such as parapet walls and chimneys);
- Gutters, down-pipes and associated rainwater goods;
- External wall surfaces and joinery;
- Drains.

The 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.

Drains and inspection chambers by lifting drain covers.

Our role is to describe symptoms rather than ascribe causes. We will identify existing defects where they are visible by means of simple non-destructive and non-intrusive observation. We will not be 'opening-up' any internal or external elements to investigate causes of defects.

Where possible, though, we will make a diagnosis indicating possible causes and suggesting what specialist advice (if any) you should seek.

Access is a critical limiting factor in providing the service, and in turn health and safety is a critical issue in access – indeed, where we consider access is unsafe we will have to limit the extent of the inspection. For example, inspection of the roof will require a suitable hatch to the roof void and an appropriate and secure access to the external roof surfaces. The service will be limited to a visual inspection of surfaces which are safely accessible to the inspectors. We will use ladders for access to external wall surfaces whenever we can but where this form of access is unsuitable or unnecessary the inspection will be completed with binoculars. Our report will identify the general limitations that were experienced.

The service will include a limited amount of clearing gutters (where access permits) and first aid, on-the-spot maintenance where small, but critical, areas of disrepair are encountered during the inspection. Repair will be entirely temporary in nature using reversible techniques and materials, and is intended to avoid significant consequential problems until you have permanent repairs made at the earliest possible opportunity.

The findings of the visual inspection will be presented in a report. This will identify in a clear and straightforward way our opinion and recommendations on the priorities for maintenance. Digital images will be used to aid communication. The report could help

you to build-up over time an 'owner's manual' detailing the maintenance history of the property.

If work *beyond* the first-aid maintenance outlined above is needed, we will explain what needs to be done and how urgent it is, but will not be seeking to do the work ourselves. Maintain is a heritage group not a building firm. You will be able to approach contractors armed with the facts but once we have given you our report then follow-up action is a matter for you to deal with. We hope you will act on our report as appropriate.

Appendix 2: Evaluation

The Pilot was evaluated by Stephen Bond (Director, TFT Cultural Heritage; Partner, Tuffin Ferraby & Taylor; former Surveyor of the Fabric, Tower of London; expert on maintenance management).

A summary of part one of the evaluation was carried in the report.

Here is the full text of the evaluation.

FINAL EVALUATION REPORT

OF

THE BATH AREA PILOT

FOR

MAINTAIN OUR HERITAGE

April 2004

PART I: PRINCIPAL REPORT
(Nov 2003)

1 INTRODUCTION

1.1 Background

Maintain our Heritage [MoH] ran a pilot maintenance and inspection service in Bath and North East Somerset region from April 2002 to September 2003. We have been commissioned by MoH to assess and evaluate the performance of this pilot service.

1.2 The service

The historic building's inspection service offered by Maintain our Heritage to customers in the Bath Area pilot was:

- ♦ An inspection of those areas of the structure and fabric of the building that are critical for maintenance, using independent historic building advisers;
- ♦ A report, written in layman's terms and using digital photographs, on the priorities for maintenance work;
- ♦ An explanation of the report provided to the customer in person;
- ♦ The carrying out of a limited amount of first-aid on-the-spot repair, where small, but critical, areas of disrepair were encountered during the inspection.

The priorities adopted in the report for maintenance work were categorised as: 'A' – immediate; 'B' – within the next six months; 'C' – within one year; 'D' – as part of a regular maintenance programme.

The scope of the inspection undertaken in each case was to be:

- ♦ Roof coverings (including flashings to abutments), gutters, downpipes and associated rainwater goods, and external wall surfaces (including the external joinery);
- ♦ Internal roof voids (for any evidence of water ingress and attendant fungal or insect attack);
- ♦ Internal areas where maintenance problems had been identified in the external walls and/or joinery;
- ♦ Drains and inspection chambers (a visual inspection only carried out by lifting covers).

The sequence of any commission was determined in advance to be:

- i. Customer enquiry
- ii. A pre-inspection visit (no charge, no obligation)
- iii. MoH to issue offer letter and quotation
- iv. Acceptance of offer by the customer
- v. Inspection (including limited first-aid repairs)
- vi. Report issued by MoH
- vii. Post-inspection consultation (if requested by the customer)

1.3 The assessment and evaluation process

In this evaluation report, we have been asked to:

- i. Set out relevant information on the aims and assumptions that were made by MoH at the outset of the pilot;
- ii. Report on the effectiveness of the pilot in testing and achieving and/or confirming those aims and assumptions;
- iii. Make observations on lessons to be learned from the pilot process.

This report fulfils the first two tasks. For reasons that are set out in section 2.4 below, the third task has been held over pending completion of essential background research.

The following documents were provided to enable us to undertake the evaluation:

- ♦ A brief for the evaluation of the Bath and North East Somerset Region Pilot;
- ♦ The second draft of MoH's report on the pilot dated 20 October 2003;
- ♦ Maintenance inspection reports for five properties:
 - The Corner House, Chapel Hill, Kingston Magna
 - The Holbourne Museum of Art, Bath
 - 6 Henry Street, Bath
 - Midford Castle, Midford, Bath
 - St George's Church, Cam
- ♦ 17 completed customer questionnaires;
- ♦ A business plan for the pilot service;
- ♦ An application for funding under English Heritage's Heritage Grant Fund;
- ♦ An analysis of the casework undertaken during the pilot study recording: (i) the dates of enquiry, site visits, inspection and report preparation and submission and (ii) the quotation and payment made;
- ♦ Internal administrative documentation relating to the handling of enquiries and for use on the pre-inspection visit;
- ♦ Illustrative leaflets, fliers and publicity material used to promote the service.

2 EVALUATION OF THE PERFORMANCE OF THE PILOT SERVICE PROVIDED BY MAINTAIN OUR HERITAGE

2.1 The stated assumptions and aims behind the pilot service

The **assumptions** that were made in developing the pilot service are set out in section 3 of its Business Plan. Verbatim, these are stated to be that:

- *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 inspectors can do worthwhile emergency repairs;*
- *The quality of the inspectors’ work can be supervised so that they achieve a consistently acceptable standard;*
- *The productivity of the inspectors is as planned, and is not subject to factors (e.g. travelling time, reliability of inspectors, vehicles, owners, etc) which make the service inherently uneconomic;*
- *There are no insuperable access, health & safety, legal etc issues which render the service as proposed impractical;*
- *A sufficient number of owners will want the service and be prepared to pay for it (though in this pilot [MoH does] not expect to recover the economic price to enable the service to be provided without subsidy by [MoH] or anyone else e.g. the private sector);*
- *Suitable private builders and professionals exist to whom owners can be referred and will accept such referrals.*

The **aims** of the pilot service are set out in section 4 of the Business Plan. Verbatim, these are stated to be:

- *To validate key assumptions made by MoH;*
- *To provide hard evidence that these assumptions are valid, i.e. so that [MoH] can demonstrate to other bodies that they are valid – not merely to [MoH];*
- *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;*
- *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;*
- *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.*

2.2 Assessment of the robustness of the stated starting assumptions

Having reviewed the documentation provided to us at some length, our assessment of the robustness of the starting assumptions is as follows:

Experienced, trained craftspeople can provide the defined service

No definition is provided in any of the documentation that we have reviewed to clarify what was intended by the use of the term 'craftspeople'. Accordingly, we have interpreted this word to imply the use of practical, skilled but not professionally trained, 'from the tools' artisans as inspectors for this service.

The second draft of MoH's report on the pilot service dated 20 October 2003 states that:

“MoH sought candidates [for the role of inspector] 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.”

Noting that teams of two were required for each inspection for health and safety reasons, the report goes on to record that:

“The Inspectors recruited their own Assistants to work with them on inspections...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.”

The Maintain our Heritage draft report records that three Inspectors were used. These were individually described as:

Inspector 1: A trained building surveyor, with experience of working with historic buildings and a Masters in Historic Conservation from the University of Bath, who worked for 15 of 17 months over which the pilot was actively carried out;

Inspector 2: A craftsman who worked for a maximum of 3 months;

Inspector 3: A building surveyor who undertook 4 inspections in 2 months.

Regrettably, we have had to conclude that the pilot has not satisfactorily established the veracity of the assumption that “experienced, trained craftspeople can provide the defined service”. In total, 63 of all 73 inspections were led by an Inspector who came from a professional, not a crafts, background. 59 of the inspections were made by an Inspector with a Masters in Historic Conservation. These are not typical attributes of 'experienced trained craftspeople'. Similarly, a significant number of the Assistants to the Inspectors (although not identified specifically in the report) appear from the description given to have come from professional or at least atypical crafts backgrounds.

The foregoing should not be taken to disqualify or disprove this starting assumption. The conclusion is that the pilot failed to demonstrate that the assumption was robust and, accordingly, it remains *unproven*.

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

The draft MoH report records that, in undertaking 73 inspections, total expenditure on the pilot was £79,869 and total income (assuming all monies are paid) from the customers will be £15,869 [all figures excluding VAT]. The cost of the inspection teams is identified as being £16,300. Using rounded figures, the expenditure and income *per inspection* was, thus:

Full cost of each inspection	£1,100
Net cost of inspection team (excluding equipment, travel etc)	£225
Income from customer (fee charge)	£220

On this basis, the average ‘loss’ sustained by MoH on each inspection was £880. The cost of the inspection team marginally exceeded the income received from the customer.

Although no hourly rate is cited for the Inspectors and Assistants in MoH’s report on the pilot, we understand from the Project Co-ordinator that Inspectors were paid £17.50 per hour and Assistants £7.00 per hour.

Whilst it is accepted that, depending upon contractual arrangement, suitable craftspeople might be ready and willing to carry out the service for this level of average hourly income, the pilot has not satisfactorily demonstrated this assumption. The Inspectors employed on the pilot cannot be regarded as being representative of ‘suitable craftspeople’, for the reasons already given. Far more difficult is the concept of ‘terms and conditions that MoH can afford’. The level of subsidy per inspection during the pilot would not be sustainable by MoH in a permanent operation, as things stand. Furthermore, in the customer questionnaires provided to us, less than 12% of customers stated that they would use the service again if charges were increased. Thus, the pilot has not proven adequately that affordability can be improved by making an increased charge to the customer for the same product.

We have concluded that the pilot service has not established satisfactorily that “suitable craftspeople are ready, willing and able to carry out the service on terms and conditions that MoH can afford” and this remains *unproven* as an assumption, accordingly.

The Inspectors can be trained satisfactorily and MoH can provide suitable “proof of learning”

MoH’s draft report states that:

“None of the Inspectors used required core training in building or conservation matters because they had adequate knowledge and experience. The training

organised was [in] 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".

Each report has been signed off by a Chartered Surveyor, presumably indicating his belief that, in each case, it had been prepared to a professional standard and that its contents were accurate. A cursory reading of the reports provided to us did not contradict this assessment, although, equally, without re-inspecting each property, we could not verify that the reports are in all respects accurate. However, because:

- i. the majority of the Inspectors (numerically and in terms of the number of inspections each undertook) were from a professional not a crafts background, and,
- ii. "none of the Inspectors used required core training in building or conservation matters",

it is not possible to conclude safely that the pilot has validated the assumption that 'the inspectors can be trained satisfactorily'. It is probable that, at an unknown cost, MoH could provide such training, but this did not occur during the pilot and hence the assumption remains *unproven*.

The inspectors can do worthwhile emergency repairs

MoH's report on the pilot records that, typically, emergency work undertaken at the same time as the building inspection might be the clearing of debris and vegetation from flat roofs, rainwater goods, drainage channels and courtyards, with the occasional refixing of slipped or damaged slates and temporary patching of failed weathering elements using flashband.

In an interview with one Inspector, we were told that difficulties in providing safe access significantly restricted the type of emergency repair that could be undertaken at the time of the site inspections, so that the only gutters that could be cleared were those immediately within reach from the point of access or which could be accessed across a flat roof. He concluded that there were very considerable limitations on what could practicably be done in terms of emergency repair as part of an inspection. This seems to be verified by the documentation that we have reviewed. In the five inspection reports provided, only two describe work being carried out on site and, in both cases, this was limited to leaf and debris clearance. Whilst, undoubtedly, this kind of maintenance action can be described as 'worthwhile', strictly it does not fall into the category of 'emergency repair'. At least one questionnaire respondent was disappointed that the service had not included the kind of emergency repairs that, in that instance, the customer felt (whether justifiably or not) might have been undertaken during the inspection.

The Bath Area pilot has demonstrated that a restricted amount of worthwhile maintenance action and emergency repairs can sometimes be implemented as part of the inspection process. It is certainly not always possible to undertake the requisite emergency repairs from the access equipment that is appropriate for inspection purposes in the particular circumstance. Clearly, when such work is undertaken, the time taken by the two person team on site will be greater, thereby increasing the

average cost to MoH of each inspection. There are also significant health and safety concerns that need to be considered on each and every occasion before attempting emergency work with the limited access equipment that is to hand. Thus, the assumption that “the inspectors can do worthwhile emergency repairs” has been at least *partially validated* during the pilot.

The quality of the Inspectors’ work can be supervised so that they achieve a consistently acceptable standard

A comprehensive understanding of the quality and accuracy of the Inspector’s work during the pilot could only have been achieved through random sampling (spot checks) of inspections by a supervisor, combined with the checking of written reports for adherence to MoH’s policies and procedures. No mention is made in the second draft of MoH’s report of any supervision or checking of the inspection process whilst it was being undertaken and it is our understanding that this did not occur. However, all reports were checked and authorised by a Director of MoH who is a Chartered Surveyor.

There are no grounds to suspect that a ‘consistently acceptable standard’ could not be achieved in such a service, but we do not believe that the pilot has validated the assumption satisfactorily, since the accuracy of the Inspector’s site findings has not been established beyond doubt. The assumption remains *unproven*, therefore. It should be noted that building in a supervisory sampling of inspections would increase the costs of the service to MoH.

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

As far as we can judge from the data provided to us, the productivity of the inspection teams was satisfactory. The massive subsidy required for each inspection is not attributable in any part, as far as we are aware, to inefficient working by the Inspectors.

However, the nature of this starting assumption seems questionable to us. In reality, the reliability of the parties and travelling time do have an impact upon all professional services of this nature and, therefore, must be brought into the “economic” equation. Productivity will vary with every Inspector and according to the means by which the report is prepared and delivered. The service will be uneconomic, if the cost of the product exceeds its value (as perceived from the charge that can be made for it).

Within very limited parameters, we conclude that the pilot has demonstrated that the Inspectors can achieve satisfactory productivity. Whether or not the service is ‘inherently uneconomic’ is probably at the mercy of factors that have nothing to do with the Inspector’s individual productivity. We do not accept that the pilot could have validated the assumption that the productivity of the Inspectors may on occasion not be “subject to factors which make the service...[on that occasion] uneconomic”.

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

From the documentation we have reviewed, MoH appears to have met no insuperable issues which would render the service, as proposed, impractical. However, the experience from the pilot in respect of professional indemnity insurance cover may prove a significant problem in extending the service to a wider area or nationally. It is unlikely, in our view, that PII cover of £1million would be sufficient given the risks of the service.

We conclude that, in a very limited extent, based on the restricted service provided, no insuperable access, health & safety, legal or other similar issues have yet been encountered that render the service, as proposed, impractical.

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

MoH was able to reach its target for the number of inspections commissioned by customers, although only after extending the end date for the pilot significantly. Analysis of 17 post-service customer questionnaires (23.6% of the total customer base) demonstrates a general satisfaction with the quality and ease of understanding of the inspection reports, and the value for money provided by the service. Conversely, only 52% of respondents stated that they would use the service again ‘a year from now’ at a similar or higher cost.

The pilot has established that there is a real demand for the service, but in our view it has failed to establish that customers are willing to pay a realistic and economic price that would allow the development of a sustainable long term service. In particular, it is questionable from the results of the pilot whether there is demand for a ‘year on year’ annual inspection service similar to that provided elsewhere. Accordingly, the assumption that “a sufficient number of owners will want the service and be prepared to pay for it” remains *unproven*.

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

The service was specifically offered as an independent service and, therefore, recommendations of this kind were not made. The most frequent potential improvement to the service suggested by otherwise satisfied customers in questionnaires was the provision of recommendations of reliable contractors to undertake the recommended repair and maintenance actions.

Practically, this assumption could only be validated on a local basis and then only if the contractors were regularly checked for the reliability of their ability and willingness to accept and undertake work in a competent manner. This problem and the associated risks of legal liability have bedevilled many attempts to produce and maintain recommended lists of suppliers.

The pilot did not validate the assumption that “suitable private builders and professionals exist to whom owners can be referred and will accept such referrals”.

Whilst in all probability the assumption is correct, it is *unproven* so far as performance of the pilot is concerned.

2.3 Assessment of the achievement of the stated aims of the pilot

Having reviewed the documentation provided to us, our assessment of the achievement of the pilot's aims is as follows:

To validate key assumptions made by MoH

As has been set out above, in our view, despite the considerable success of the pilot, the majority of the starting assumptions remain unproven. Accordingly, this aim has not been fulfilled.

To provide hard evidence that these assumptions are valid, so that MoH can demonstrate to other bodies that they are valid

As above: in our view, many of the starting assumption remain unproven. This aim has not been fulfilled.

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

Between April 2002 and September 2003, MoH established and operated a service which undertook 73 inspections, passing its target of 72. In so doing, good experience was gained by the management team in operating such a service. This aim was achieved.

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

Promotion was achieved by dedicated mail-shots (to over 5000 listed buildings), door-to-door drops, inserts, and displays in libraries. Advertisements were lodged in local newspapers and property magazines. The MoH draft report records extensive media interest in the pilot. English Heritage supported the project with a Heritage Grant of £39,000, Bath Preservation Trust made a grant of £3,000, and the Esmée Fairburn Foundation assisted with a grant of £30,000.

Within the confines of a pilot of limited duration undertaken in a small geographical locality, the concept and importance of maintenance has been promoted to a substantial number of relevant bodies and individuals. The very practical approach of the pilot will have been very helpful in developing this message to home owners. This aim has been fulfilled.

To obtain case studies and materials for the promotion of maintenance

A good range of building types were inspected in the pilot: 37 mixed urban residential and other buildings (including two museum/visitor attractions), 9 mixed rural residential buildings, 14 churches, chapels and meeting houses, 7 educational buildings, 3 outbuildings and 3 miscellaneous (total - 73).

The inspection reports and the process of conducting the pilot service have produced invaluable case study material and experience that must be used in the wider promotion of the importance of maintenance. This aim has been achieved.

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

With the exception of the pilot's database of customers and the addresses of 5000 listed buildings (presumably by building, not by building owner/occupier name) to which fliers were sent, little other building owner related data appears to have been obtained during the pilot. The service could not be continued on a sustainable economic basis to the existing customers alone. Thus, as a means of providing the wherewithal to establish a permanent service, this aim has not been fulfilled.

To identify successful marketing techniques needed to launch a permanent service

Analysis of the 17 customer questionnaires indicates that 59% first learned of the service through MoH's promotional leaflets. Of these, 20% picked up the leaflet from an unknown location; the remainder received the leaflet through their door as part of a targeted mailshot campaign. The MoH draft report records that the take up of enquiries on receipt of promotional literature was less than 0.5%. The questionnaires show that the next most successful means of customer generation after leafleting was through the media – 23.5% of customers heard about the service that way.

The pilot has not been able to demonstrate that such tactics would be effective in a similar way on a wider geographical scale; however, there seems no reason to dispute this assumption for the moment. To this extent, the pilot has assisted in understanding the means by which marketing might best be undertaken in launching a permanent service, but it cannot be said to have established beyond doubt that this style of marketing would be as successful another time. This aim has been partially fulfilled.

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

The MoH draft report on the pilot concludes that the service has been shown to be practicable, but that clarification of resource requirements is needed. With some reservations, we concur with this assessment.

The service is clearly shown by the pilot to be feasible in terms of practical applicability. Conversely, the demand for a permanent service in the area and the basis for its cost effectiveness have not been established and, indeed, must be regarded

as being highly questionable. Accordingly, the sustainability of a permanent service in the area is unproven by the pilot.

To assess the feasibility of a permanent scheme, the pilot needed to test a wide range of issues. These are listed on page 4 of the second draft of the MoH report. Whilst we commend the wide range of issues which were tested, we are not fully convinced that the depth of testing in the pilot provides an adequate basis for a permanent service (for instance: legal and insurance issues, health & safety, demand at realistic cost, scope of works undertaken on site, skills/experience/training needed for inspectors). There are serious issues of skill, responsibility, and liability to be addressed before a permanent service could be termed 'feasible' in its widest sense.

Therefore, we conclude that the aim of assessing the feasibility of a permanent service in the area and identifying the resources needed to launch such a service has only partially been fulfilled by the pilot.

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

The extent of training provided by MoH during the pilot has been described above. It was limited and did not encompass any training on building and conservation matters. This would probably not be the case in any permanent service, especially if the Inspectors were to come from more crafts-oriented backgrounds. It must be assumed that MoH will need to extend its training opportunities and mechanisms (possibly to include specific assessment of Inspector's capabilities before appointment) to launch a permanent service.

In a limited sense, this aim was partially fulfilled during the pilot, but the full extent of training need and provision has not been experienced to date. Its resource implications cannot be fully calculated, as a result.

2.4 Conclusions

The pilot has been highly successful in delivering a service that meets with its customer's 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 nine starting assumptions, we have concluded that six remain unproven after completion of the pilot; the other three assumptions have only been validated in limited respects. The achievement of the pilot's aims has been slightly better: of nine stated aims, we have concluded that three have been met in full, three have been partially fulfilled, and, three have not been satisfied.

PART II: ADDITIONAL COMMENTARY
(APR 2004)

1 INTRODUCTION

1.1 Background to Part II of the Final Evaluation Report

In Part I of our evaluation report, prepared in November 2003, we concluded that:

“The pilot [had] been highly successful in delivering a service that [met] with its customer’s expectations in terms of quality and value for money. It...also raised the profile of maintenance in the [Bath] locality and amongst organisations associated with the care of historic buildings.

Despite these major successes, it [had been] less successful in proving the robustness of its starting assumptions...Of [its] nine starting assumptions, we...concluded that six remained unproven after completion of the pilot; the other three assumptions [were] only...validated in limited respects. The achievement of the pilot’s aims [was] slightly better: of nine stated aims, we...concluded that three [had] been met in full, three [were] partly fulfilled, and, three [had] not been satisfied.”

As a result of the evaluation process, we felt that there were a number of lessons that could be drawn from the pilot exercise. This second part of the final evaluation report deals with these. It has been prepared following further background research and after discussions with the Project Co-ordinator and three Directors of MoH who had been actively engaged in the commissioning and implementation of the pilot study, including the Inspector who undertook the great majority of the seventy three building inspections.

2 ISSUES ARISING FROM THE BATH PILOT STUDY

2.1 Cultural perceptions of maintenance

Our society in the UK, whilst not being ‘anti-building maintenance’, certainly does not find it an attractive or rewarding concept. This is not a new thing. Maintain our Heritage is not the first organisation to find promotion of maintenance a difficult task. As just one example, since the early 1980s, the charity Upkeep (initially called the ‘Building Conservation Trust’ and based in a wing of Hampton Court Palace) has struggled to sell the notion of good and timely maintenance to the nation. Despite many initiatives over the past 25 years, a unique ‘museum of building construction, repairs, maintenance and conservation’, and on-going industry support, it has achieved only modest long-term successes and little development of wider market awareness of the importance and cost effectiveness of proficient maintenance in this time.

The problem pervades every aspect of our society. Although we are a nation that is proud of our heritage, we operate national financial and tax systems that do little to encourage its maintenance. Successive UK governments have resisted calls to introduce appropriate incentives to overcome this, although other countries have found this to be a beneficial investment.

Public and private funding bodies working in the heritage field find it difficult to grant aid maintenance and tend to focus on capital projects instead. This simply mirrors a culture which is seemingly more smitten by the concept of the makeover than that of on-going care and where individuals are more likely to invest £220 buying goods at a garden centre than on an annual check of the health of (abnormally expensive) property. Maintenance is unsexy. It maintains a desperately low profile, even in our major heritage management organisations. It commands little respect as a vocation. Its budget is nearly always the first to be cut by any organisation when times get tough.

This is the context within which the profile of Maintain our Heritage and the success of its Bath pilot must be seen. Bath might not be regarded as being the most typical of locations in which to test the concepts behind the pilot project; it has a veneer of heritage that implies a potentially wider acceptance amongst its community of the duty of long-term care of old buildings. Yet even here, selling the benefits of an inexpensive annual property inspection combined with simple but effective maintenance proved problematic.

It is difficult to say what the answer is. One overarching lesson from the Bath pilot is that, without significant public subsidy, a permanent scheme along the lines tested and focused on owner-occupied housing could not be sustained – even in a World Heritage City such as Bath. Such a subsidy – whether provided in the form of a major revenue grant to the service provider, as a personal tax incentive to the owner, or otherwise – is almost unthinkable in today’s economic climate, given our cultural perceptions of the relative importance of building maintenance.

It is equally unrealistic to expect a not-for-profit company dedicated to the promotion of good maintenance of heritage assets to have much rapid impact on a society whose

priorities lie elsewhere. The battle for hearts and minds over building maintenance can only be successfully fought and won when our cultural focus has already begun to shift. It will take a sustained high profile intervention from politicians or from an organisation with the clout of English Heritage, Historic Scotland, the National Trust, or perhaps even the Heritage Lottery Fund to achieve this. Our cultural prejudices are too deeply engrained to expect otherwise.

2.2 Cultural perceptions of the professions and the crafts

The Bath pilot also sought indirectly to challenge another deeply engrained cultural trait – the hard and fast separation of the roles of the professional and the craftsman that has developed in the UK since the Victorian era. The pilot demonstrated acutely the problems that exist in breaking down this division.

The two relevant starting assumptions of the pilot were that ‘experienced, trained craftspeople can provide the....service’ and that ‘suitable craftspeople are ready, willing and able to carry [it] out’. In the event, neither proved to be the case, in our opinion. Difficulties were experienced in identifying suitably talented craftspeople to train to prepare survey reports of a detailed and professional standard. As a result, the service was provided by a small group of surveyors from a professional background. To paraphrase an observation that was made to us: the craftspeople lacked the confidence and approach to adapt to undertaking detailed property surveys; the professionals found it difficult to conceive of undertaking basic routine maintenance activities as an equal component of the overall service.

Realistically, the clear and hard divide between professional and craft activities is so deeply entrenched in the structure and content of education and training in this country that it will be difficult to develop a permanent service that gives equal attention to both the survey and to routine maintenance without a representative from each background on the service team.

2.3 Practical barriers to implementing a combined inspection and maintenance service

2.3.1 Health and safety

One of the major barriers to practical implementation of the pilot service was found to be the difficulty in providing cost effective safe one-off access to relevant parts of every building, sufficient to undertake the necessary activities. A good deal of pessimism has been expressed to us about the prospects of overcoming this problem adequately to be able to deliver the depth of service that would be demanded by building owners in a more permanent operation.

There are two aspects to the problem: basic constraints on simply achieving safe access to high, concealed or generally inaccessible locations and/or the provision of a safe working platform from which to undertake necessary inspection or maintenance activities away from ground level. The extent of safe access that can be afforded by a ladder is extremely limited. Beyond that, the practical or economic restrictions imposed variously in using a cherry picker (that is, a mobile hydraulic platform),

harnesses or abseiling make full access for inspection and maintenance an impossible dream. Yet, to a degree, this is a staple key benefit and attraction of the service to potential customers. In the end, we understand that, during the pilot, access to high level gutters was generally only possible where safe access onto an adjacent or overlooking roof area already existed. This amounts to a significant constraint on the performance of the service.

Comparison with similar established services in Europe is revealing – especially with that in the Netherlands. There, as a result of positive Government incentives to help develop the scheme, long-term retention of customers for annual building inspections has made it possible for permanent fixing points to be discreetly installed to many historic buildings, facilitating access for the service team each year. This is not economically viable for one-off inspections. Furthermore, there is perhaps once more a cultural barrier to be overcome. Many building owners in the UK would not regard it as their responsibility to pay for the installation of permanent safe access to all parts of their property and, thereafter, to pay again annually to ensure the access points remain in good condition, secure and safe to use – rather, most would tend to see this as being the remit and duty of the service provider on each and every inspection. It should be noted that, despite the benefits that have accrued from long-term loyalty to the Dutch service, we understand that even there on-going developments in health and safety legislation are causing the extent of access to buildings to be reviewed and, with increasing frequency, curtailed.

2.3.2 Cost effectiveness

The cost effectiveness and affordability of the pilot service have already been reviewed in Part I of this evaluation report. It is not intended that this ground should be covered again in Part II. However, there are some further observations to be made about the probable costs of long-term performance of the service, especially relating to health and safety and cultural issues that have been raised in the preceding subsections.

In recent years, health and safety legislation has become significantly more onerous. It is most unlikely that this will change. The costs of frequent updating and refresher training of service operatives (whether from a professional or crafts background) will be high for any permanent service. The ongoing need for training was not a cost that had to be borne in any significant way by the limited duration pilot. It is all too easy to anticipate that long-term costs will always be less than for limited duration projects because of the possibilities for improving efficiency and spreading outgoings over time. This is not always the case. Health and safety provision in all its forms is one area where pro rata long-term costs may well exceed those of the pilot service.

It is worth highlighting one further considerable cost inefficiency that appears to be demanded by health and safety considerations. Safety during performance of both inspection and maintenance functions requires each team to be made up of at least two operatives. The dilemma is that, to carry out his/her safety role adequately, the second operative should not be actively engaged in work activities, but should be attending on and (essentially passively) watching the first operative at work. This is a significant overhead to bear when cost has been shown to be a fundamental stumbling block to wider long-term take up of the service.

It has been put to us that the cost effectiveness of the service could be greatly enhanced by streamlining the report content and format. This may well be the case. The trick will be to continue to deliver the quality and content that the customer anticipates, whilst paring down the extent of the report to a more economic level. The most concise reporting format for building inspections is often that of the pro forma spreadsheet. However, this is less likely to be acceptable to the 'lay' customer. This may be a matter of education and promotion that needs to be addressed in marketing a long-term service.

2.3.3 Professional indemnity insurance

The final issue arising from the evaluation process that needs to be raised is that of professional indemnity insurance (PII). Background research that we have undertaken after completion of Part I of the evaluation report suggests that a long-term service roughly comparable to the pilot might experience difficulties in maintaining PII cover at an economic level. It has been indicated to us by contacts in the insurance market that Maintain our Heritage was fortunate to negotiate its cover for the pilot given its intention to utilise professionally unqualified and inexperienced craftspeople to prepare detailed building inspection reports. The mechanism used to overcome this perceived risk during the pilot – signing off of each completed report by a chartered surveyor – is not found to be acceptable by most PII insurers unless the survey team was actively led by that surveyor. The PII market place is a restricted and shrinking field. Our enquiries suggest that the few remaining professional indemnity insurance providers are likely to become increasingly conservative in their assessment of risk in the coming years. Thus, a service structured along the lines of the Bath pilot will probably find adequate PII cover increasingly difficult and expensive to procure. This will impact significantly on the affordability of providing the service.

The practice of using a chartered surveyor to sign off reports also needs to be considered from the vantage point of the surveyor him/herself. Ultimately, however much the practice is dressed up with exclusion clauses, the chartered surveyor is taking personal responsibility for the performance of the inspection service and the accuracy and adequacy of the content of the report. Unless he/she was present during the site work, this represents a dangerous and invidious exposure to risk. As a result of a number of court cases over the past twenty years, it is an approach that few professional surveying practices are prepared to countenance.

3 SUMMARY

The Bath pilot was a highly valuable exercise in assessing the potential for and possible pitfalls in developing a combined inspection and maintenance service for built historic assets. It was essential ground breaking research. As we noted in our conclusions to Part I of the evaluation report, it was highly successful in delivering a service that met with its customer's expectations in terms of quality and value for money. It also raised the profile of maintenance in the locality and amongst organisations associated with the care of historic buildings.

On completion of the pilot exercise, the questions to be addressed are whether and how to take the concept further. The foregoing observations have been made in this spirit. It is generally accepted, we believe, that it would be difficult at the present time in the UK to expect to launch successfully a wide scale permanent service for historic houses in the immediate guise of the Bath pilot. Rather, there appears to be potential to develop the service one stage further in restricted niche markets – for example, as part of the annual care of ecclesiastical buildings. The Bath pilot has shown – for better or worse – that there are significant cultural barriers and prejudices that need to be overcome before a wider service can be successfully contemplated. This is beyond the capability of a small not-for-profit company such as Maintain our Heritage to influence directly. However, it can be hoped that one legacy of the Bath pilot may be an increased awareness amongst opinion formers of the need to effect such cultural change for the long-term health, sustainability and advantage of our built heritage.

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