



**Historic  
Environment  
Grants**

Maintenance Plan  
Grants Scheme

**Notes for Guidance**

## Introduction

Modest spending on regular maintenance can reduce the need for costly repairs, protect the fabric of your building and save you money in the longer term.

Historic Scotland can award grants for the preparation of maintenance plans for historic buildings that we consider are of outstanding architectural or historic interest and where we consider it beneficial for the building to have its own maintenance plan. We consider applications once a year in January and the completed application should be submitted by 30 November. We will award grants at rates of up to 75% of the cost of preparing a maintenance plan prepared by a suitably accredited professional adviser. The maximum grant for each application is, however £6,000.

The aim of these notes are to help you and your accredited professional adviser to prepare a costed maintenance plan.

## What is maintenance?

Maintenance is the routine work which is necessary to protect the fabric of a building. When carried out on a planned basis, maintenance helps to prevent the types of failure which occur predictably within the life of a building.

Maintenance falls into three main categories:

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

Maintenance differs from repair, which is work carried out to put right defects, significant decay or damage, and work to return a building to a good condition on a long-term basis. You should not include repairs in your maintenance plan.

## Why you need a maintenance plan

Regular maintenance is the best way to ensure the continued preservation and future use of a building. Such work is part of the day-to-day responsibility of all owners and occupiers.

Maintenance is most effective when carried out regularly, on a planned cycle. Not only should planned maintenance extend

the life and preserve the appearance of your building, but it is most beneficial in conservation terms because less historic fabric is lost in regular, minimal and small-scale work than in disruptive and extensive repairs.

Good maintenance needs the regular investment of small amounts of time and money, but the cost of preparing and carrying out a planned maintenance programme should be far less than the costs resulting from a series of unplanned major repairs, and will help you plan your future financial commitments and fundraising needs.

## Who can apply?

Applicants must be organisations or individuals who have a legal responsibility for the repair of a historic building. You will normally need to own the building, or hold a full repairing lease, which has at least 21 years to run. You must be able to demonstrate that your property is open to the public for at least 25 days per year.

## Which Buildings qualify?

### Buildings of outstanding architectural or historic interest

These will be buildings which we assess as being in Bands 1 to 4 of our 4 categories of outstanding buildings (see enclosure in pack).

### Need for a Maintenance Plan

Where we consider it beneficial for the building to have its own maintenance plan.

## Professional Adviser

We will give a grant only if you employ a competent professional adviser with relevant specialist conservation knowledge ability or experience to prepare your costed maintenance plan.

**This professional must be a suitably accredited professional in building conservation.** You may wish to consult the appropriate professional body for information on accredited professionals before choosing an adviser.

Details of suitably qualified architects experienced in the repair of historic buildings can be obtained from the Royal Incorporation of Architects in Scotland (RIAS) Tel: 0131 229 7545. [www.rias.org.uk](http://www.rias.org.uk)

Details of suitably qualified chartered building surveyors experienced in the repair of historic buildings can be obtained from the Royal Institution of Chartered Surveyors in Scotland (RICS) Tel: 0131 225 7078. [www.rics.org](http://www.rics.org)

## Identifying the maintenance tasks

Your costed maintenance plan, which must be prepared by an accredited professional adviser, should contain the following information:

### Building element

You should identify each element of the building, including:

- roofs;
- rainwater disposal system, both above and below ground;

- external walls, including doors and windows;
- internal structure;
- building services.

## Maintenance task

List the maintenance tasks (inspection, specific tasks and minor repairs) which are to be carried out to each element of the building.

## Responsibility

Identify who is responsible for carrying out each maintenance task. Categories could include:

- building contractors;
- specialists, such as electrical contractors, engineers or steeplejacks; or
- unskilled or voluntary workers.

## Frequency

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

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

## Writing your maintenance plan

To convert this information into a 10-year maintenance plan you should allocate each of the **regular tasks** to an appropriate month (or months) of the year, taking into account who will be carrying out the task. For example:

- If you employ a building contractor to clear the gutters every six months, this task should be carried out in spring and autumn, after the fall of blossom and leaves. Other tasks which your building contractor carries out, such as inspecting and carrying out minor repairs to roof coverings, could be done at the same time.

- If unskilled or voluntary workers check the building for signs of beetle activity in May, then other non-skilled internal inspections, such as checking internal structure for signs of structural movement, could also be carried out in May.

To help you plan your future financial commitments and fundraising needs, your professional adviser should obtain realistic estimates for the cost of implementing your maintenance plan over 10 years. You will need to bear in mind that realistic costs will have to take into account safe working practices and means of access.



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