



SAVING HISTORIC PLACES

MODULE
05

Preservation Toolkit

Maintenance Plan

“Developing a maintenance plan – and committing to stick with it – is an effective way to manage the routine tasks that are essential to extending the life of your building. Not only does this preserve the integrity of your property’s original historic and character-defining features, but it also prevents major systems failures and provides a safe environment for the occupants.”¹

A maintenance plan is a document about your historic property that includes background information, a maintenance schedule, and a record of work completed. It is an essential part of your overall preservation plan. With a maintenance plan you can monitor your resource’s condition, needs, and anticipate and budget for the work necessary to ensure its sustained preservation while creating a record of your efforts to assist future owners.

¹ Trust for Architectural Easements: Preserving Historic Neighborhoods, “Preservation by Prevention: Creating a Maintenance Plan,” Trust for Architectural Easements: Preserving Historic Neighborhoods, last modified February 24, 2014, <http://architecturaltrust.org/preservation-by-prevention-creating-a-maintenance-plan/>.

What Belongs in Your Maintenance Plan?

Your maintenance plan should reflect the specific needs of your historic resource and include tools for you to track material changes over time and in various weather conditions.² These tools include:

Description of character-defining features

This information documents the physical elements of your property that best reflect its significance. It may be helpful to review the National Parks Service Preservation Brief 17 <https://www.nps.gov/tps/how-to-preserve/briefs/17-architectural-character.htm>.

Building Chronology

This information will help you identify where additions, alterations, and changes over time have occurred to your historic building. Documenting this information will allow you to prioritize your maintenance and plan for long-term needs. Historic and current photos, Sanborn Fire Insurance Maps, and original drawings and plans are great resources to document these previous changes.



Maintenance Budget

Traditional maintenance budgets should be 1% to 3% of your property's purchase price. For example, \$3,000 - \$9,000 should be saved annually for a \$300,000 building. It is not likely that you will spend \$3,000 every year on maintenance, but it is important to set aside a healthy savings for when maintenance such as roof replacement is needed.

² The existing framework for this resources was provided by "Preservation by Prevention: Creating a Maintenance Plan," and the National Park Service Preservation Brief 47 <https://www.nps.gov/tps/how-to-preserve/briefs/47-maintaining-exteriors.htm>.

Schedule

Your maintenance schedule should include periodic inspections of each element of your historic property. The Condition Assessment Checklist (see Module 2) can be refined as a guide for tracking each element. Creating blank floor plan and elevation drawings is helpful for making notations of conditions you are monitoring or needed repairs.

Inspections should be conducted annually and after major storms or electrical outages depending on the physical feature. (i.e., inspect your roof and gutters after a major storm or hail event). Please view the National Park Service Preservation Brief 47 for suggested times of inspection. <https://www.nps.gov/tps/how-to-preserve/briefs/47-maintaining-exteriors.htm>.

Records

Your maintenance plan records should include:

- Written (digital and hard copy) historic information and research
- Annual Condition Assessment Checklists with annotated base plans and elevations. Be sure to include any photographs taken during annual inspection or preservation work
- Work contracts and receipts
- A list of contractors to call during an emergency (See Working with the Right Preservation Professionals [Module 6]).



Other records that should be included are warranty cards, paint colors, materials sources, and any other information that can be helpful for the next owner or preservation professional.

If you sell your property, be sure to leave a copy of these records to assist the new owners.

This module is part of the Preservation Toolkit developed by Restore Oregon to provide a general orientation to the decisions and processes of historic preservation and reuse. Every project is unique and the information presented does not attempt to address all the aspects or variables that may be encountered. The engagement of a qualified preservation professional is encouraged.

== If Historic Places Matter to You, Join Restore Oregon! ==



Since 1977 Restore Oregon has worked to preserve, reuse, and pass forward the historic homes and buildings, bridges and barns, churches and Main Streets that make Oregon, Oregon.

As a nonprofit, our ability to advocate, deliver programs, and produce materials like the Preservation Toolkit depends on the support of people like you. We invite you to stand up for the historic places that matter to you and become a member by visiting us at restoreoregon.org/join.

Thank you!



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