

APPENDIX F: ANNUAL MAINTENANCE INFORMATION FROM OTHER ORGANIZATIONS

Prince George's County

In September 1997, M-NCPPC (Prince George's County) prepared a document titled *Report to the Prince George's County Council on the Historic Sites of The Maryland-National Capital Park and Planning Commission in Prince George's County*. The report provided its Council with costs for capital improvements and maintenance of its historic resources. For each building, the agency had an historical architect conduct a detailed inspection and prepare a cost estimate for "Stabilization," "Restoration for Partial Use," and "Restoration for Full Public Use." While the individual buildings were looked at in great detail, the Commission did not determine any overall formula for establishing annual maintenance on a group of buildings. (See Appendix H for sample building summary from Prince George's report.)

The National Park Service

The National Park Service also can serve as a model to Montgomery County for annual maintenance. It has developed a multi-tiered stewardship program outlined in a policy document called NPS-28, "Cultural Resource Management." This policy includes annual inspections in an Inventory and Condition Assessment (IACP) Program; a series of checklists for maintaining historic properties (e.g., "Roofing/Waterproofing Quality Assurance Checklist"); the training of maintenance personnel; planning for historic structures in each park's general management plan and interpretive prospectuses; preparation of plans and specifications by an historical architect; and examination of all structures and documentary research either by in-house staff or professionals qualified in architectural history and/or historic architecture.

The National Trust for Historic Preservation

The National Trust for Historic Preservation is a decentralized organization that owns 26 sites, nine of which are "stewardship" sites, or properties actually staffed by National Trust for Historic Preservation employees. The Trust receives a free appraisal on each of its properties from Chubb Insurance Company in exchange for insurance services that Chubb provides through its broker, The National Trust Insurance Services Group. Each of these properties is assigned a Replacement Cost value so that the Trust can replace each feature *in kind* should there be any damage to the organization's buildings. Regarding annual maintenance, each of the Trust's sites has autonomy from the National Trust headquarters in developing its budget and each is 100% financially independent of the Trust (except in the sense that capital improvement grants are sometimes allocated for special projects). As a result of the sites' autonomy, there is no single method for determining annual maintenance costs; each site director arrives at figures independently based on how many roofed structures are on the site, the structures' usage, and their condition. The Trust also manages the land that goes with each site and often these are cultural landscapes in their own right. Typically, landscape maintenance figures are bundled together with structural maintenance figures in annual maintenance budget line items. As for standards, the National Trust does have published standards on the care and conservation of its properties.

The Colonial Williamsburg Foundation

The Colonial Williamsburg Foundation (CWF) estimates the value of its properties by conducting appraisals related to insurance. As for maintenance, it conducts regular, annual inspections and assessments of its buildings by both architectural conservators (from the Architectural Collections Department) and foremen of the maintenance shops (from the Facilities Maintenance Department). Reports are then generated from these detailed inspections and are organized by trades (paint, carpentry, masonry, electrical, plumbing, etc.). From these reports, work orders are generated. The foreman of the maintenance shops works with an estimator in the Planning Department to establish both estimates for material and labor costs for each work order. Much of the work is done with CWF's own maintenance staff.

Historic New England (formerly the Society for Preservation of New England Antiquities)

Historic New England (HNE) prides itself on being the oldest, largest, and most comprehensive regional preservation organization in the country. It has a Stewardship Department that manages 75 properties for which HNE holds an easement. In those cases, properties are maintained by private property owners, each of whom is required to contribute an endowment when the property is turned over to HNE to support the five paid staff members in the Stewardship Department. HNE advises these homeowners by lecturing on preservation practice and distributing "Recommended Maintenance Program" and "Routine Maintenance Advice" information plus a bibliography of material on historic building stewardship. The Stewardship staff visits the properties annually--or more often--if work is being conducted.

A separate Property Care Department manages the 35 properties that HNE owns. Property Care Managers, most of whom have contractor experience, are responsible for estimating the cost of annual maintenance. The buildings are placed into a tier system and the tiers rotated so that all buildings eventually benefit from preventive maintenance. When the organization develops the budget for cyclical or basic maintenance, it is based on the previous year's actuals (furnace checks, gutter cleaning, driveway maintenance, lawn mowing, plowing, water bills, heating bills, etc.). In addition, Property Care Managers develop additional work item budgets (painting, wood repair, etc.) based on the needs of the sites. Looking at HNE's total budget for building and landscape work and dividing it by the number of buildings (including outbuildings), the organization spends about \$11,000 per building per year in annual maintenance. This is a generic average that doesn't reflect the fact that the organization may spend \$22,000 at one building and zero at another.