

# Drafting a Maintenance Plan

## An Annotated Bibliography

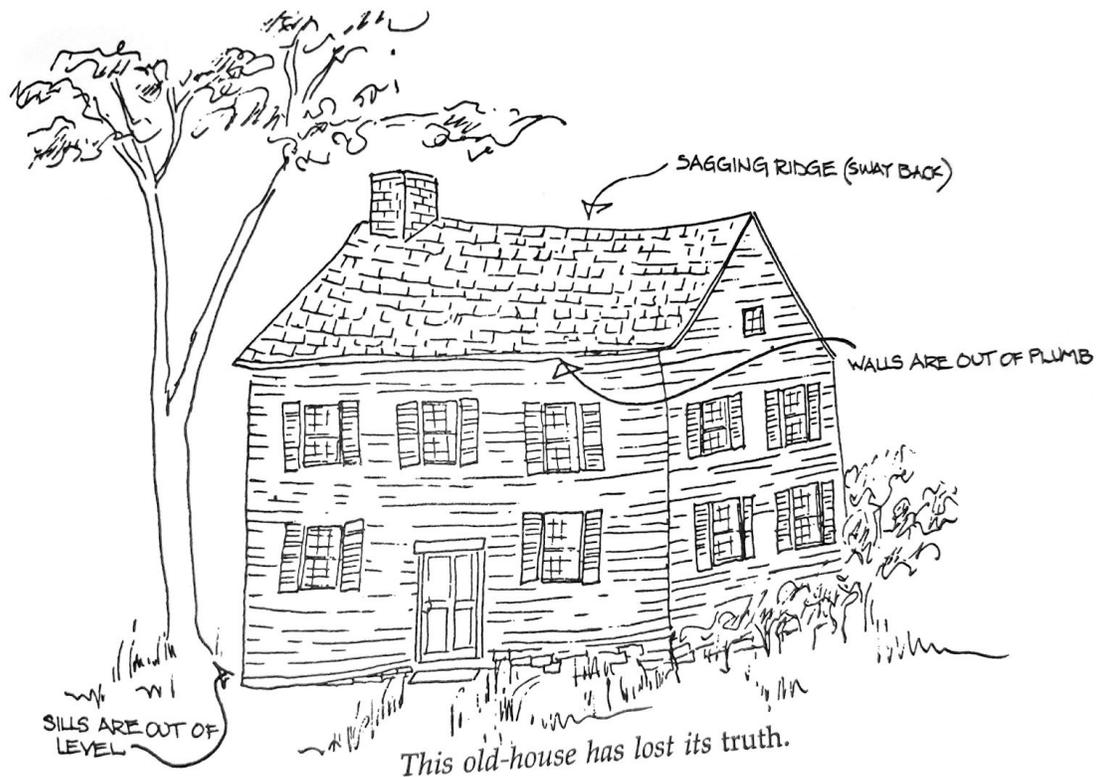


Image from "The Old-House Doctor" by Christopher Evers

### Overview

The purpose of this document is to provide resources to aid in drafting a maintenance plan for your building(s). It aims to offer a mix of approachable overviews, technical documents, templates, references, and additional repositories to source information. Overall, it is not an exhaustive list, but provides a place to start your stewardship journey.



## Selected Excerpts

**“Of the many processes used to “preserve” an historic building, maintenance is almost always the most effective and least destructive. Although most people recognize this fact, the vast majority of historic preservation efforts in this country focus on saving buildings once they begin to fail, rather than preventing the failure from occurring in the first place.”**-Preservation Maintenance: A Universal Manual for Developing Conservation Maintenance Plans, City of SteamBoat Springs

**“Everything gets dirty! We all know this from personal experience; dust and dirt seem to accumulate on books and furniture in our homes at a phenomenal rate...Although long-term deterioration cannot be halted, maintaining a clean and constant environment can slow the effects of time.”**

-Housekeeping for Historic Homes and House Museums by Melissa Heaver

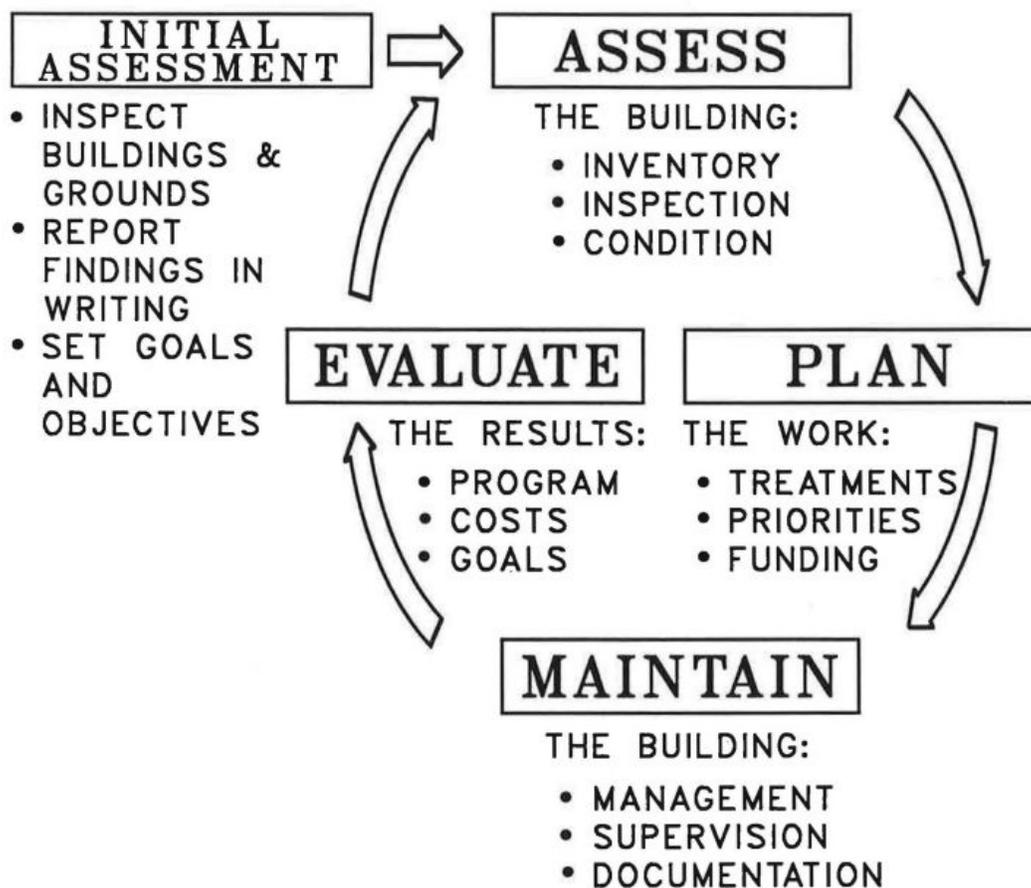
**“Buildings and their users need to be better understood if they are to be successfully managed and cared for.”**

-Building Pathology 2nd Ed. by David S. Watt, p.271

**“If you want your old-house to get the very best medical attention, *you* are going to have to learn to be its doctor....It’s up to you to supply the overview that will hasten the recovery and safeguard the health of the body and soul of your house.”**

-The Old House Doctor by Christopher Evers, p.7

# The Cycle of Effective Maintenance



## Sample Maintenance Plans

[Maine Preservation's Sample Cyclical Maintenance Plan](#)

[Cyclical Maintenance Manual for Historic Bartram's Garden, Heritage Consulting Inc.](#)

## Checklists and Templates

[SteamBoat Springs-Historic Preservation Maintenance: Plans, Manuals and Checklists](#)

A straightforward informational page from Main Street SteamBoat Springs, this page has great information for organizations, but also helpful resources for individuals. Resources from this page that are particularly helpful:

- [Conservation and Maintenance Worksheet-Universal Checklist](#)
  - It is a comprehensive list to reference when assessing the conditions of systems and materials. The linked document above is the original provided by SteamBoat Springs is a non-editable PDF. Colorado History has created an [Editable Conservation and Maintenance Worksheet](#).
- [Individual Maintenance Plan - TEMPLATE](#)
  - Please note that this is not editable and will have to be transferred to a different format.

[Inspection Checklist for Historic Buildings, Vermont Division for Historic Preservation](#)

“This checklist will help you recognize potential problems, set priorities, schedule work and control the costs of maintaining your building. Remember that it is cheaper in the long run to repair, restore and maintain an older home than purchase a new one--and it frequently yields dramatic returns upon appraisal or resale.”

[The Annual Home Maintenance Checklist by Ronda Kaysen, New York Times](#)

A simple annual home maintenance checklist for any homeowner or building steward.

## Online Manuals and Handbooks on Old Building Maintenance

[Preservation Maintenance: A Universal Manual for Developing Conservation Maintenance Plans](#)

This document is the complete version of SteamBoat Spring' Historic Preservation Maintenance: Plans, Manuals, and Checklists website linked under “Checklists and Templates.” “A long term maintenance strategy involves several key components for



proper planning and budgeting. This document is an overarching discussion about historic building maintenance and is intended to work with a more detailed maintenance checklist tailored to the needs of an individual building.”

[Maintenance Programming Manual for Historic Buildings, John Leeke \(maine.edu\)](#)

This comprehensive manual by John Leeke is an approachable document with down to earth language. He also has a publication for purchase, [Practical Restoration Reports Compendium](#), which includes a section on “Managing Maintenance.”

[Whole Building Design Guide-Operations and Maintenance for Historic Structures](#)

This webpage “addresses the special nature of historic structures and how they should be treated with respect to operations and maintenance (O&M) in the ongoing use of a structure, whatever that use may be. Modern use of historic structures inherently comes into some measure of conflict with the desire to preserve them. These conflicts may be caused by code requirements, accessibility issues, human comfort, life safety, and other modern needs which can cause conflict and require compromises.” It also offers a solid additional resources.

[National Trust For Historic Preservation-Housekeeping for Historic Homes and House Museums](#)

This resource is unique in that it focuses more on the general housekeeping and maintenance of the interior of your building. In their words: “This manual is designed to assist those responsible for the care and maintenance of an older or historic home, whether private residence or house museum. Individuals who own antiques or family heirlooms will find helpful advice about cleaning methods and supplies. This guide also explains what not to do, and when not to do anything at all. Suppliers for many of the products mentioned in this guide are listed in the resource section at the end of the book.”

[Interiors Publications: The Interiors Handbook For Historic Buildings, Volume II-Historic Preservation Education Foundation and the National Park Service](#)

With many publications addressing the maintenance of building exteriors, there are fewer publications that cover how to maintain your buildings interior. This book, although



published in 1993, provides a thorough overview which includes sections on planning and maintenance.

[National Park Service Preservation Brief 47-Maintaining the Exterior of Small and Medium Size Historic Buildings](#)

NPS resource, Preservation Brief 47 is a good place to start.

“This Preservation Brief is designed for those responsible for the care of small and medium size historic buildings, including owners, property administrators, in-house maintenance staff, volunteers, architects, and maintenance contractors. The Brief discusses the benefits of regular inspections, monitoring, and seasonal maintenance work; provides general guidance on maintenance treatments for historic building exteriors; and emphasizes the importance of keeping a written record of completed work.”

[Rehab It Right! Historic Property Owner's Guide, Utah Heritage Foundation](#)

This document provides an approachable step by step to starting work on your property. Page 6 specifically addresses “Maintaining Your Property.”

[U.S. General Services Administration-Historic Preservation Technical Documents](#)

Truly a technical “how-to” repository. You can explore the many resources that are organized by materials and specific needs.

## **Useful Publications For Purchase**

[Restoring your Historic House by Scott T. Hanson with photography by David J. Clough](#)

This is an extremely approachable, comprehensive, and worthwhile guide. Although more expensive it covers almost anything a homeowner or steward might need to know to restore their building from process to materials and tools.

[Maintaining and Repairing Old and Historic Buildings by John J. Cullinane](#)

This book is a “practical guide to the maintenance and repair of old and historic buildings.” However, it is expensive making it a better resource for non-profits, organizations, and enthusiastic individuals.

[Old House Handbook: A Practical Guide to Care and Repair by Roger Hunt and Marianne Suhr \(The Society for the Protection of Ancient Buildings\)](#)



Coming out of the UK, this book includes useful diagrams and pictures while covering some specialty topics such as earth traditions. It is another approachable text that would work well for homeowners to organizations.

#### [Building Pathology 2nd Edition by David S. Watt](#)

This book also comes from the UK, and therefore has references that do not apply to US buildings. That said, this book is a great resource for diagnosing your buildings issues, as well as provides an in depth consideration from understanding building pathology, to treatment, to maintenance/repair. The book is more expensive than some on this list, and the style is more dense and technical, but not unmanageable and certainly covers all the bases for restoring and maintaining your building. It would make a good library addition for an individual enthusiast or organization.

#### [The Old-House Doctors: The Essential Guide to Repairing, Restoring, and Rejuvenating Your Old Home by Christopher Evers](#)

If you're looking for an old-school classic this book has been a go to reference. It features appealing drawn diagrams, and charming prose that does not stray from the book-long anatomy analogy. Be aware that some notes on treatments, such as wood preservatives, may not reflect current materials and technologies.

For your enjoyment here is an excerpt from the the opening chapter *The Body and Soul of the Old-House*:

“Have you ever been powerfully attracted to an old-house without quite knowing why? You will open a door to an understanding of this mysterious attraction when you become aware of the unusual relationship between an old-house and the human body. As strange as it may seem, the two so closely parallel each other in so many details of their anatomy and physiology that they often may be thought of as nearly interchangeable...If an old-house can be considered an outer body in which *our* bodies may live, what provisions does it make for the sheltering of our spirits or souls? No such shelter is provided by some otherwise excellent structures that somehow lack the intangible quality that allows us to feel truly at home in them. Most old-houses nonetheless welcome human spirits and give their inhabitants an extraordinary feeling of peace, wholeness, and belonging.” p.1-2

## Special Considerations

### [Preservation Brief 31: Mothballing Historic Buildings](#)

#### [“Mothballing” buildings: proactive maintenance and conservation on a reduced budget](#)

Although the hope is to continue utilizing our buildings there are moments where they may remain unoccupied for longer durations. In that case considering Mothballing may be the best choice. Preservation Brief 31 offers a good starting place for understanding what it means to “Mothball” a building or structure.

### [Principles of Emergency Planning and Management by David Alexander](#)

In addition to vacancy, it is important to consider events that exist outside that of normal maintenance, repair, and restoration. This includes both human and natural elements, and may warrant separate planning and preparation.

## Libraries and Repositories

### [The Association for Preservation Technology International \(apti.org\)](#)

“APT’s MISSION is to advance appropriate traditional and new technologies to care for, protect, and promote the longevity of the built environment and to cultivate the exchange of knowledge throughout the international community.”

Useful resources on this site:

- [Practice Points](#): “Each column illustrates an existing or cutting-edge technology or technique in practice, shares original research in the history of building technology and materials, or presents recent case studies in which new technologies and techniques have been used successfully.”
  - [Successful Preservation Implementation: A Planned Approach to Risk Management](#)
- [APT Building Technology Heritage Library](#)
  - Looking for primary sources on your old boiler, house type, finish, windows, and more? The APT Building Technology Heritage Library is an amazing resource containing a broad range of architectural trade catalogs, house plan books, and technical building guides.



[Preservation Library: articles, regulations & policy, PreservationDirectory.com](#)

PreservationDirectory.com offers a huge amount of information. For the purpose of maintenance plans the link above is for their preservation library.

[PreserveNet Resources](#)

Another website that offers a broad range of resources. On this page check out the “Traditional Trade/Crafts” and “Materials Conversation” sections.

[Publication Overview — Historic Preservation Education Foundation \(hpef.us\)](#)

Another slightly different repository which may include publications not included in other lists. Sections to note are the [Interiors](#), [Preserving the Recent Past](#), and [Working on the Past](#) (which provides a video overview of the Secretary of the Interior’s Standards of the Treatment of Historic Properties, and the differences between Preservation, Rehabilitation, Restoration, and Reconstructions). Which cover topics that the class did not have time to cover in depth.

[National Trust for Historic Preservation-Research & Policy Lab](#)

“The National Trust’s Research & Policy Lab is the next generation of the Preservation Green Lab, expanding our research and policy innovation to issue areas beyond the original scope of environmental sustainability. The Lab conducts innovative research and develops new policies to help conserve and reuse older and historic buildings. The Lab’s ground-breaking reports provide data and analysis on the connections between older buildings and a range of positive economic, social, and environmental outcomes. The Lab maintains a national database of information about buildings in cities across the country and partners with preservation and community leaders to leverage their built assets to support more inclusive, healthy, and resilient communities.”

## **Government Resources**

[National Park Service-Preservation By Topic, Technical Preservation Services, \(nps.gov\)](#)

The “Technical Preservation Services has compiled this index to assist users in finding the online and printed information that has been developed on the subjects of historic preservation, cultural landscapes, and the rehabilitation of historic buildings. The index is arranged alphabetically and topics are cross referenced where appropriate.”

## [National Park Service-Preservation Briefs - Technical Preservation Services](#)

“Preservation Briefs provide information on preserving, rehabilitating, and restoring historic buildings. These NPS Publications help historic building owners recognize and resolve common problems prior to work.”

This page lists all of the official preservation briefs that have been created by the National Park Service. Below are briefs that may be useful in developing a maintenance plan and repairs. Keep in mind that this is the “highest” level of preservation, and the extent and practices referenced may be more than is necessary for typical homeowners.

- [Preservation Brief 3: Improving Energy Efficiency in Historic Buildings \(nps.gov\)](#)
- [Preservation Brief 4: Roofing for Historic Buildings \(nps.gov\)](#)
- [Preservation Brief 6: Dangers of Abrasive Cleaning to Historic Buildings \(nps.gov\)](#)
- [Preservation Brief 8: Aluminum and Vinyl Siding on Historic Buildings \(nps.gov\)](#)
- [Preservation Brief 9: The Repair of Historic Wooden Windows \(nps.gov\)](#)
- [Preservation Brief 15: Preservation of Historic Concrete \(nps.gov\)](#)
- [Preservation Brief 17: Architectural Character—Identifying the Visual Aspects of Historic Buildings as an Aid to Preserving their Character \(nps.gov\)](#)
- [Preservation Brief 21: Repairing Historic Flat Plaster Walls and Ceilings \(nps.gov\)](#)
- [Preservation Brief 22: The Preservation and Repair of Historic Stucco \(nps.gov\)](#)
- [Preservation Brief 24: Heating, Ventilating, and Cooling Historic Buildings—Problems and Recommended Approaches \(nps.gov\)](#)
- [Preservation Brief 28: Painting Historic Interiors \(nps.gov\)](#)
- [Preservation Brief 31: Mothballing Historic Buildings \(nps.gov\)](#)
- [Preservation Brief 32: Making Historic Properties Accessible \(nps.gov\)](#)
- [Preservation Brief 35: Understanding Old Buildings: The Process of Architectural Investigation \(nps.gov\)](#)
- [Preservation Brief 43: The Preparation and Use of Historic Structure Reports \(nps.gov\)](#)
- [Preservation Brief 47: Maintaining the Exterior of Small and Medium Size Historic Buildings \(nps.gov\)](#)



[National Park Service-Preservation Tech Notes—Technical Preservation Services, \(nps.gov\)](#)

Besides the preservation briefs the National Park service also offers Preservation Tech Notes which “provide practical information on traditional practices and innovative techniques for successfully maintaining and preserving cultural resources.” These cover topics from housing museums collections in historic buildings to preserving office buildings. This page, in particular, features a lengthy section on window restoration!

[National Park Service-Cultural Landscapes—Technical Preservation Services](#)

A separate page is dedicated to cultural landscapes.

[NCPTT | National Center for Preservation Technology and Training \(nps.gov\)](#)

NCPTT “helps preservationists find better tools, better materials, and better approaches to conserving buildings, landscapes, sites, and collections. It conducts research and testing in its own laboratories, provides cutting edge training around the U.S., and supports research and training projects at universities and nonprofits. NCPTT pushes the envelope of current preservation practice by exploring advances in science and technology in other fields and applying them to issues in cultural resources management.”

[Technical Preservation Services-National Park Service-What is Historic Character?](#)

This is a fun interactive resource that you can use to learn how to “weigh the visual impact of proposed changes to the exterior, interior, and site using a 3-step approach. By applying this method to evaluate a historic building from a distance, up close, and inside, you can begin to decide where alterations might reasonably take place – and which visual aspects you need to preserve.”

[From the Roof Down...and Skin Deep: Site Map \(nps.gov\)](#)

This National Park Service educational tool at surface level is a bit corny and not the prettiest. That said, the little program takes you through many of the maintenance considerations introduced in the class. It’s worth clicking through from start to finish just to refresh your basics.



## Researching Your Property's History

### [10 Ways to Research Your Home's History](#)

From the National Trust for Historic Preservation, this is a brief overview on how to research your home's history.

### [Beginner's Guide to Tracing Your House's History \[Megapost\]](#)

A lengthy online guide that covers almost anything you might want to know about researching your property.

### [A Guide to Researching the History of a House - HomeAdvisor](#)

This page offers a wealth of information to help you get started on researching your property.

### [National Register Bulletin 39](#)

Otherwise titled "Researching a Historic Property."

## Minnesota Specific Resources:

### [Find Information About a Property's History | Minnesota Historical Society \(mnhs.org\)](#)

If you are still working on building your property history, check out this informational page from the Minnesota Historical Society.

### [Minnesota State Historic Preservation Office \(SHPO\) / Minnesota State Historic Preservation Office](#)

If you have a place that is listed on the National Register of Historic Places, or otherwise may have been officially documented you may find useful resources at the MNSHPO office.

### [Preservation Specialists Directory-Minnesota Historical Society](#)

Another Minnesota Historical Society resource, this page lists many, but not exhaustively, many preservation trades professionals in Minnesota.