

PRESERVATION NEWSLETTER

CREATING A HOME MAINTENANCE PLAN

What is a maintenance plan, you ask? It is a document designed to help you assess and address the maintenance needs of your home. Why bother, you might say? Sometimes, ignorance is bliss, but not when it comes to preventative maintenance! Creating a maintenance plan can help you catch issues early and prevent costlier repairs down the road. While developing a maintenance plan might seem overwhelming—along with the prospect of what you might find when you start looking—finding these issues early is very important for the long-term care of any property. First, we will start with steps to help you develop a maintenance plan for your home.*

STEPS FOR SUCCESS

1. Get to know your house. Before you plan for the future, you will need to know where you are starting. Getting a baseline understanding of your house will help inform future actions.

a. Identify and understand distinctive finishes and features. Walk around the exterior of your home and note any distinctive finishes and features such as exposed rafter tails, brackets, fretwork, etc. Later on, when you begin to develop a schedule for assessment, be sure to include these distinctive features and finishes on your list.

b. Understand additions and alterations. Understanding additions and alterations to a structure can help you better anticipate maintenance needs as quality of materials can vary depending on the date of the alteration. This can also factor into how you make repairs to a feature or addition. For example, if an addition to your house is sided with aluminum which is beginning to fail, you may have a hard time find materials to make repairs; and replacement with a compatible modern material may be most appropriate.

c. Assess the current condition and photograph. Now that you've take note of distinctive features and finishes, additions, and alterations it's time to go back and document the existing condition of your home. Note and document any damage or areas of concern, we'll address what to look for with each item you assess when we discuss schedules later on.

**We're primarily addressing the exterior envelope of structures, but interior items and finishes can easily be added to your maintenance and assessment plans.*

STEPS FOR SUCCESS, CONTINUED

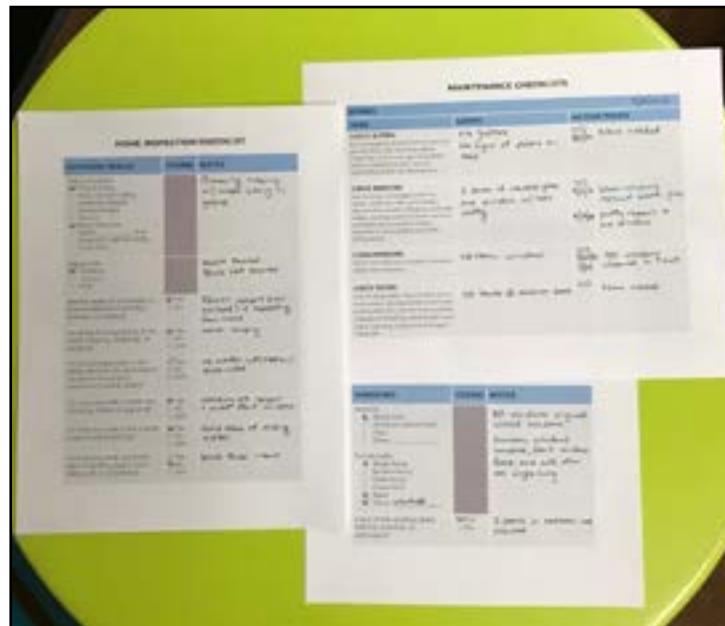
2. Prioritize need and keep a record of work completed. After you've assessed your property, pull together a list of items that need to be addressed. Focus on the items that are most critical and keep a list of the work that needs to be done versus what has been completed.

3. Develop a schedule for assessment. In the next section, we'll address a recommended schedule for assessment, but after each assessment it's a good idea to revisit your schedule for as there may be items of concern that you need to keep a closer eye on.

4. When the time comes, reassess! Add updated photographs and note any changes in condition. Address, or plan to address, any items that need maintenance.



Listing out the current condition of features on your house gives you a starting point for creating a maintenance plan. Creating checklists for each season can help you to organize when to check on specific features and allow you to catch issues early.



Noting issues and fixing them early can prevent irreversible damage; biogrowth on wood porch flooring and brick steps can not only deteriorate the materials, but can also cause a safety issue - a slippery surface that is unsafe for walking

ASSESSMENT SCHEDULE

As we said before, some items will require more attention than others, so we've pulled together a list to help you determine some of the items that should be revisited more often than others. We've also recommended seasons/times of the year to check as well as signs you have issues.

	FEATURE	WHEN TO CHECK	WHAT TO LOOK FOR
QUARTERLY	ATTIC	Before, during, and after wet seasons; check after major storms	Check for leaks, cold/warm spots, drafts, and signs of daylight
	BASEMENT/ CRAWLSPACE	Before, during, and after wet seasons; check after major storms	Check for damp areas, settling, cracking, evidence of pests
	GUTTERS/ ROOF DRAINAGE	Spring, Fall, during and after wet seasons to be sure that no water is pooling leading to rot; check your gutters more frequently in the fall to be sure they are not filling with leaves, plan to clean gutters as needed in the fall and before wet seasons	Check for sagging gutters; broken downspouts; bio growth; branches and other debris collecting on the roof, particularly in valleys; signs of pooling water; rot behind gutters, around connection points and downspouts
BI-ANNUALLY	WINDOWS	Spring and Fall, prior to colder weather, check weather stripping; Clean the inside and outside of windows (and between storm windows and original windows if you have them) annually	Look for loose or misaligned frames, sashes, hardware, trim, and screens; deteriorated weather stripping; worn sash pulleys; peeling paint and stains; window well debris accumulation; broken, cracked, or loose glazing and putty; rotting wood*
	DOORS	Spring and Fall, prior to heating and cooling seasons; heavier use doors may require additional assessment	Look for drag marks (signs that a door is not closing properly), loose frames, doors, and screens; decayed joints and frames; locking difficulties, deteriorated weather-stripping and flashing; peeling paint and stains; cracking; cupped or damaged thresholds

*Tip: When staff assesses wood, we start by feeling the material. Is the texture gummy, spongy, or soft? Is there evidence of cracking or splitting? Don't be fooled by the color of the wood or peeling paint! Sometimes wood can be stained or discolored from the presence of water. The wood may still be in good condition.

ASSESSMENT SCHEDULE, CONTINUED

	FEATURE	WHEN TO CHECK	WHAT TO LOOK FOR
ANNUALLY	ROOF	Spring or Fall, consider every 5 years by a roofer	Look for sagging, buckling, bubbling, bio growth, evidence of leaks, missing or damaged shingles or tiles
	CHIMNEY	Fall (prior to heating season), consider every 5 years by a mason	Look for issues with flashing, mortar deterioration, cracking, bio growth, shifting/sagging/leaning
	EXTERIOR WALLS/PORCHES	Spring	Look for failing paint, buckling and sagging siding, misaligned or bowing walls, bio growth, insect infestation, cracks and mortar deterioration, nails popping out; check that columns and piers are not shifting or settling; assess floor condition
	FOUNDATION/BUILDING PERIMETER	Spring/Wet Season	Check for damp areas, cracking and settling, misaligned walls, shifting piers, and bio growth; Look for any areas of damage/deterioration; areas of erosion around the foundation*
	HVAC	Spring	Clear debris to be sure that nothing is obstructing the compressor (i.e. the outdoor unit); check electrical connections and insulation on the exterior; replace filters on a regular basis; consider scheduling an inspection once a year most companies recommend the spring before the cooling season starts

*Tip: Keep plants at least 24 inches from your foundation/ exterior walls to allow for ventilation; consider adding a gravel or crush stone border (a pervious surface) to allow for better water drainage.

ASSESSMENT SCHEDULE, CONTINUED

	FEATURE	WHEN TO CHECK	WHAT TO LOOK FOR
ANNUALLY	PLUMBING	Spring or Fall	Check exposed pipes for any leaking; drain hot water heater to remove sediment annually or semi-annually; if you have a gas powered hot water heater look inside the burner chamber to be sure that there is no rust and that the flame is blue (no yellow as this generally means that the jet needs cleaning); check outdoor faucets for drips and leaks

OTHER MAINTENANCE ITEMS

1. Painting wood siding and features: Plan to repaint wood once every 3-7 years; if you prepare and prime your surfaces properly your paint job will last longer!

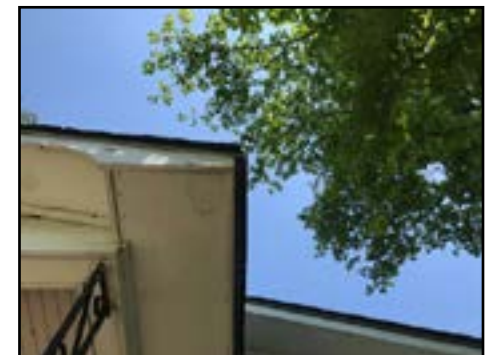
2. Tree trimming: Keep tree limbs and branches away from the envelope of your home, consider having branches that hang over your house removed (for trees on your property).

3. Window AC units: Be sure to remove window units when they are not in use as they can cause MAJOR damage to window sills, siding, and masonry below.

4. Pest detection and prevention: Consider having a specialist come and assess your home for pests that can cause damage, including carpenter bees, termites, and squirrels.



Preventative maintenance can allow you to avoid costlier repairs down the road; keeping wood painted protects against rot; keeping trees trimmed can prevent roof damage



REPAIRS, REPAIRS, EVERYWHERE...

Consider the following when thinking about repairs:

1. Consider repairs that can be reversed and will not damage historic material;
2. When replacement is necessary, consider salvage; big box stores will not likely have items you'll need for repairs, but salvage locations might have what you're looking for! With salvage you get the added benefit of the quality of historic materials and saving materials from the landfill.

So now you have a long list of repairs; Feeling a little overwhelmed with all the projects that have made their way to your to do list? Give us a call! Preservation staff can help you prioritize projects and we're always happy to share resources as well as our expertise. Keep in mind that some maintenance items require staff review, so be sure to contact us in advance.

If you would like assistance developing a maintenance plan, appropriate repairs, and advice for when to hire a professional, give [preservation staff](#) a call!

FURTHER READING AND ADDITIONAL RESOURCES

Need help choosing a contractor?

- The National Trust for Historic Preservation has some tips: <https://savingplaces.org/stories/preservation-tips-tools-find-contractors-architects-historic-home-renovation>

Need more advice on creating a maintenance plan? Check out these great resources:

- From the National Park Service, Preservation Brief 47: <https://www.nps.gov/tps/how-to-preserve/briefs/47-maintaining-exterior.htm>
- From the Trust for Architectural Easements: <https://architecturaltrust.org/preservation-by-prevention-creating-a-maintenance-plan>

Need a starting point to creating your own maintenance checklists?

- Try this manual from Manitoba: https://www.gov.mb.ca/chc/hrb/pdf/maintenace_for_heritage_bldgs.pdf
- Or check out the sample checklists from the City of Columbia: <https://planninganddevelopment.columbiasc.gov/historic-resources/>



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