



Anglican  
Diocese of  
Ottawa

# Parishes and Preventative Maintenance

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Director of Property & Asset Management

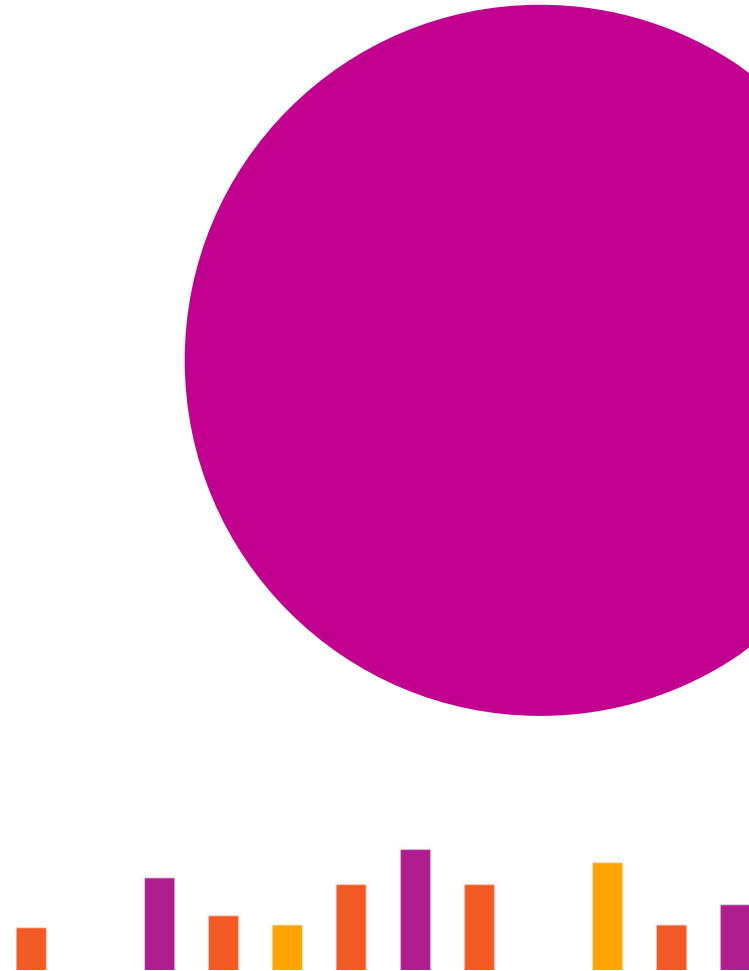
October 22<sup>nd</sup>, 2025



# Property & Asset Management

## My Role

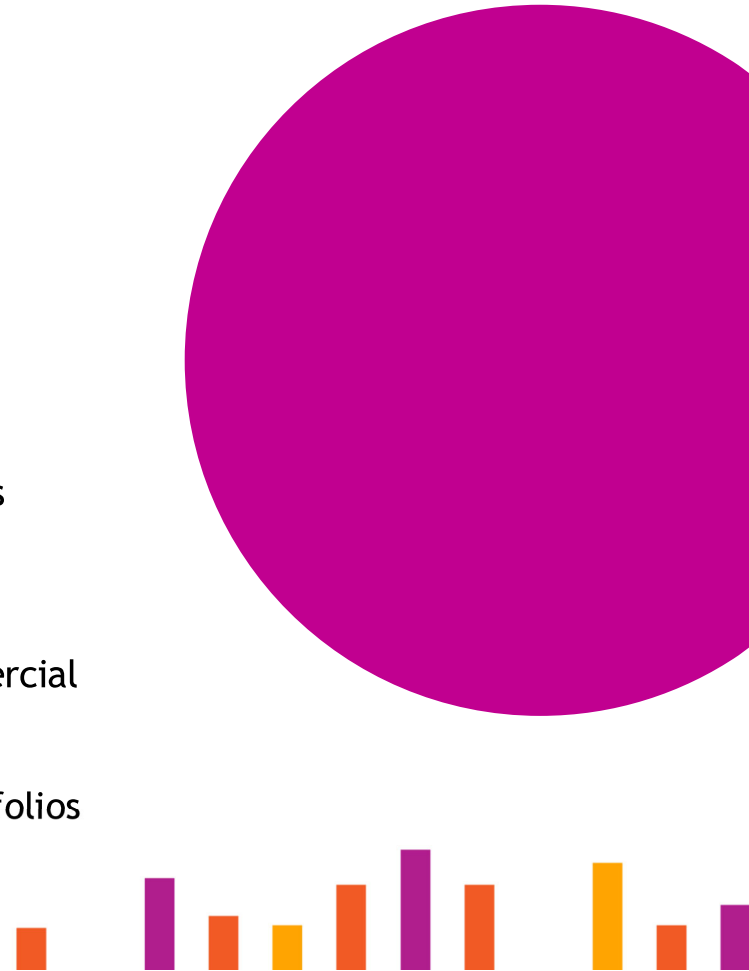
- Director of Property & Asset Management
  - Member of Diocesan Senior Staff
  - Based out of downtown Ottawa office
    - Often engage in site visits to parishes and properties
  - Diocesan resource member of Property & Finance Committee
    - Cemeteries Subcommittee
    - Risk Management Committee
  - Board member of Cathedral Hill Foundation



# Property & Asset Management

## Our Diocesan Portfolio

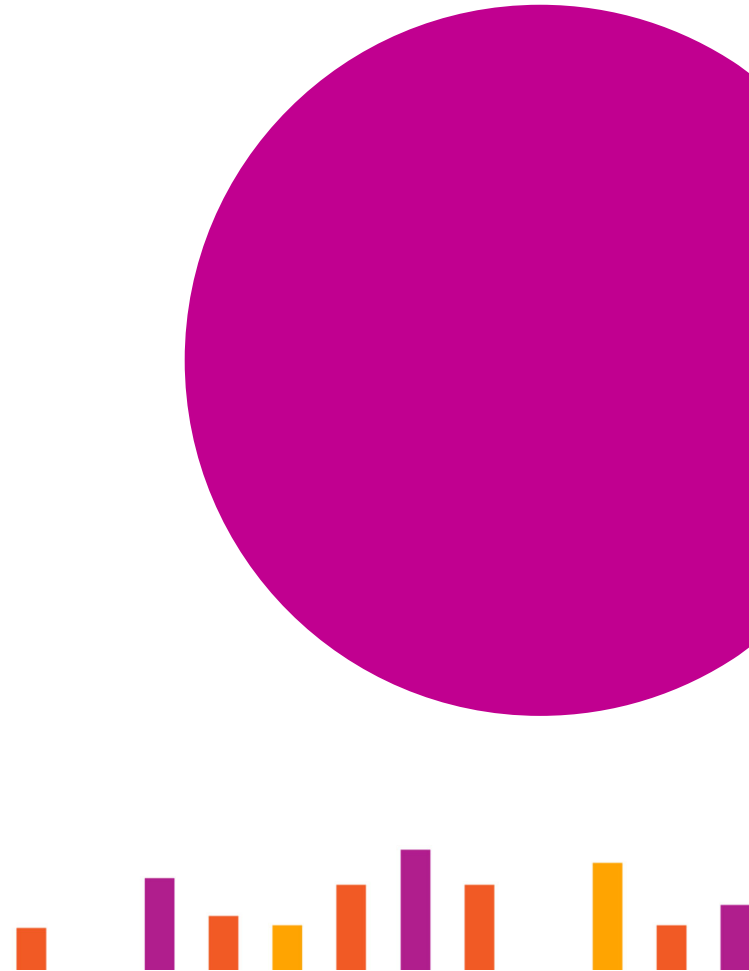
- Our office manages the ADO real estate portfolio
  - 140+ properties total between eastern ON and western QC
    - 479km between easternmost and westernmost parishes
    - 306km between northernmost and southernmost parishes
    - Just shy of \$300m diocesan property assets
  - Directly manage and operate institutional/residential/commercial Diocesan controlled property portfolio
  - Support parishes & community ministries with their own portfolios



# Preventative Maintenance

## What We Will Cover Today

- Fundamentals of Preventative Maintenance
- Establishing a Parish Preventative Maintenance Plan
- Reactive Maintenance and Reduction Strategies
- Capital Projects and Proactive Planning
- Preventative Maintenance and Property Insurance Benefits
- Q&A



# Preventative Maintenance

## Fundamentals of Preventative Maintenance

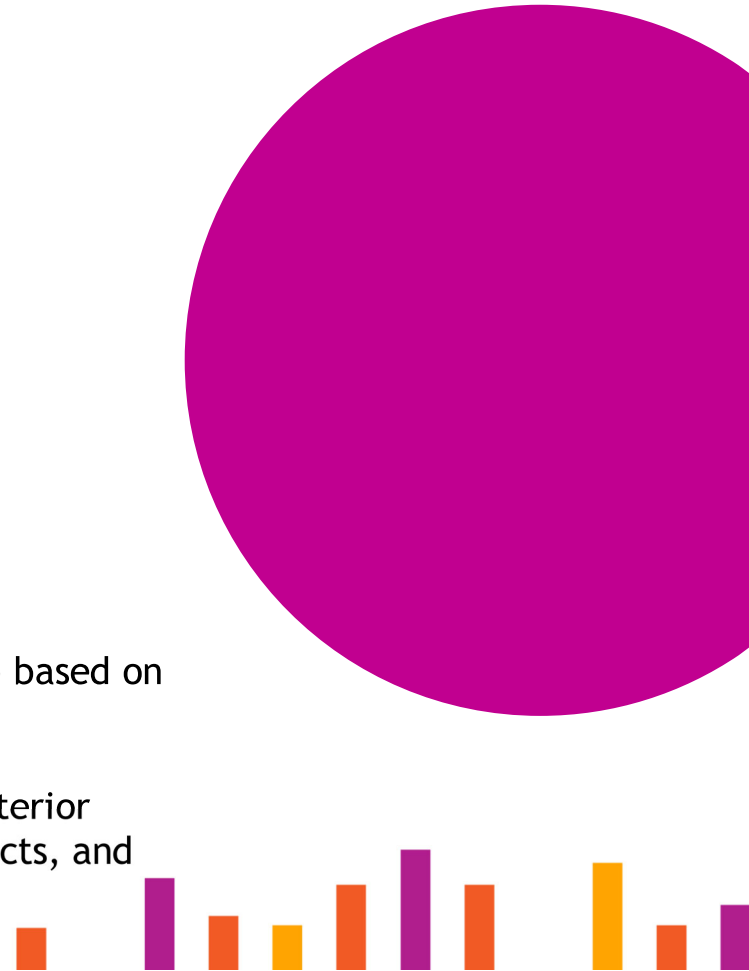
- What is preventative maintenance?
  - The planning and execution of routine inspections and servicing on a property to prevent breakdowns.
- If maintenance isn't approached from a preventative angle, then what?
  - Deferred maintenance increases the risk of major property damage (e.g., water leaks leading to mold) and liability claims.
  - Deferred maintenance resulting in reactive maintenance has a significant financial and human impact within a parish.



# Preventative Maintenance

## Key Concepts

- Inventory of Assets
  - PM programs start with a comprehensive inventory of church assets, including data on age and maintenance history.
  - For example, HVAC units, roofs, electrical panels, elevators, organs etc.
- Scheduled and Cyclical Activities
  - Follow a recurring schedule (eg. monthly/quarterly/annually) based on asset or building component type.
  - Ontario's climate demands seasonal checks to exterior and interior building components for freeze-thaw damage, snow load effects, and humidity control, as an example.



# Preventative Maintenance

## Key Concepts Con't

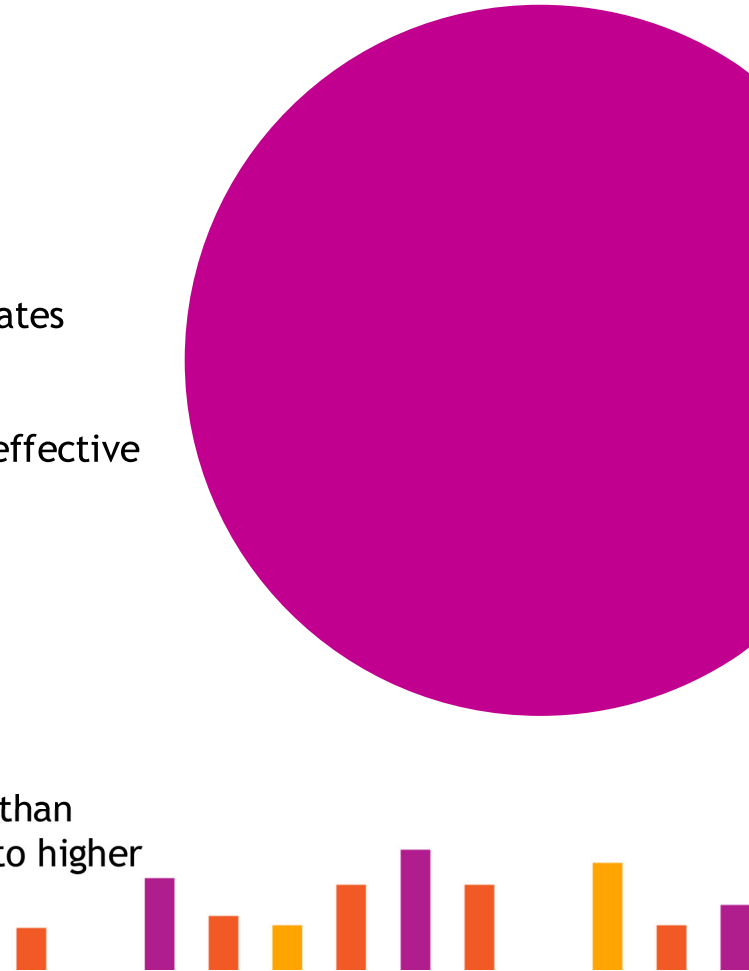
- Building Condition Assessments
  - Assessing overall facilities regularly helps to prioritize the proper sequencing of what requires attention.
  - Can be performed informally for smaller parishes, while larger parishes can opt to invest in an engineering firm's evaluation.
- Risk Reduction and Safety
  - By preventing hazards, like water leaks that lead to mold, or faulty wiring that causes fires, PM directly supports parish safety and insurance compliance.



# Preventative Maintenance

## Key Concepts Con't

- Record Keeping and Documentation
  - Documenting inspections, maintenance tasks, and repairs creates accountability and builds a long-term maintenance history.
  - This helps to preserve institutional knowledge, and supports effective budgeting and project planning.
- Lifecycle Cost Efficiency
  - Preventative maintenance lowers the total cost of ownership by extending asset life and reducing emergency spending.
  - For instance, replacing furnace filters regularly costs far less than emergency boiler repairs and system inefficiency translating to higher operating costs.



# Preventative Maintenance

## Fundamentals of Preventative Maintenance

- Why the emphasis on preventative maintenance?
  - Every \$1 spent on preventive maintenance can save \$4-\$5 in reactive repairs, as per the International Facility Management Association.
  - Poorly maintained systems (HVAC, plumbing, roofing, etc.) fail sooner, leading to more frequent replacements and shorter asset life.
  - Deferred maintenance increases the risk of major property damage (e.g., water leaks leading to mold) and liability claims.
  - Major (and preventable) property damage takes a toll on the human resources of a parish.



# Preventative Maintenance

## Establishing a Parish Preventative Maintenance Plan

- ADO approach is to offer consultations to initiate a preventative maintenance program with a parish property committee.
  - Firstly, review of building condition assessment reports/records.
  - Leverage templated PM checklists, which can be customized by property.
  - PM calendar ideal for parish property committee meeting agenda-setting.
  - Third party contractor controls for maintenance agreements are built in.
  - Ensures continuity, as 'property' folks in parishes can come and go!



# Preventative Maintenance

## Routine & Preventative Maintenance Activities Checklist

| ROUTINE & PREVENTATIVE MAINTENANCE SCHEDULE      |                               |                                                                          |     |     |     |     |     |     |     |     |      |     |     |     |                             |
|--------------------------------------------------|-------------------------------|--------------------------------------------------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----------------------------|
| Activity                                         | Property Committee/Contractor | Timing (ex. Year Round/ Bi-Annually/ Quarterly/ First Week of Month etc) | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sept | Oct | Nov | Dec | Notes                       |
| <b>EXTERIOR MAINTENANCE</b>                      |                               |                                                                          |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Snow Removal - Walkways/Parking                  |                               | Winter Months                                                            |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Snow Removal - Daily Salt & Sand Logs            |                               | Daily in Winter Months                                                   |     |     |     |     |     |     |     |     |      |     |     |     | Important for insurance pur |
| Landscaping - Spring/Fall Clean-Up               |                               | Bi-Annual                                                                |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Landscaping - Flower Beds/Shrub Trimming         |                               | Monthly in Summer Months                                                 |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Landscaping - Tree Pruning                       |                               | Annually in Spring                                                       |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Exterior hose bibbs turned on/off                |                               | Turned on in Spring and off in Fall                                      |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Exterior painting: doors, frames, railings, etc. |                               | Inspect in Spring Months                                                 |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Inspect/Clear Eavestroughs                       |                               | Bi-Annually                                                              |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Ensure Downspouts Functioning                    |                               | Monthly                                                                  |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| <b>BUILDING ENVELOPE</b>                         |                               |                                                                          |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Siding Inspections                               |                               | Annually                                                                 |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Roof/Flashing Inspections                        |                               | Annually                                                                 |     |     |     |     |     |     |     |     |      |     |     |     | Check for water pooling/vis |
| Window/Door Inspections                          |                               | Annually                                                                 |     |     |     |     |     |     |     |     |      |     |     |     | Check for cold air/moisture |
| Window Cleaning                                  |                               | Bi-Annually                                                              |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Masonry Inspection                               |                               | Annually                                                                 |     |     |     |     |     |     |     |     |      |     |     |     | Check for repointing/morta  |
| <b>INTERIOR MAINTENANCE</b>                      |                               |                                                                          |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| <b>ELEVATORS</b>                                 |                               |                                                                          |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Elevator Service Contracts                       |                               | Quarterly                                                                |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| <b>HEALTH &amp; SAFETY SYSTEMS</b>               |                               |                                                                          |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Annual Fire Testing                              |                               | September                                                                |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Smoke/Fire/CO Alarm Testing                      |                               | Monthly                                                                  |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Sprinkler System & Fire Pumps                    |                               | Monthly                                                                  |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Fire Hoses and Fire Extinguishers                |                               | Monthly                                                                  |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Interior Lighting                                |                               | Maintained when necessary                                                |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Generator Testing                                |                               | Monthly                                                                  |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Generator Inspection                             |                               | Bi-Annually                                                              |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| <b>HVAC</b>                                      |                               |                                                                          |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Boiler Checks                                    |                               | Weekly                                                                   |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Boiler Servicing                                 |                               | Quarterly                                                                |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Furnace Servicing                                |                               | Annual                                                                   |     |     |     |     |     |     |     |     |      |     |     |     |                             |
| Furnace Filter Changing (x 6)                    |                               | Every 2 months                                                           |     |     |     |     |     |     |     |     |      |     |     |     |                             |



# Preventative Maintenance

## Routine & Preventative Maintenance Activities Calendar

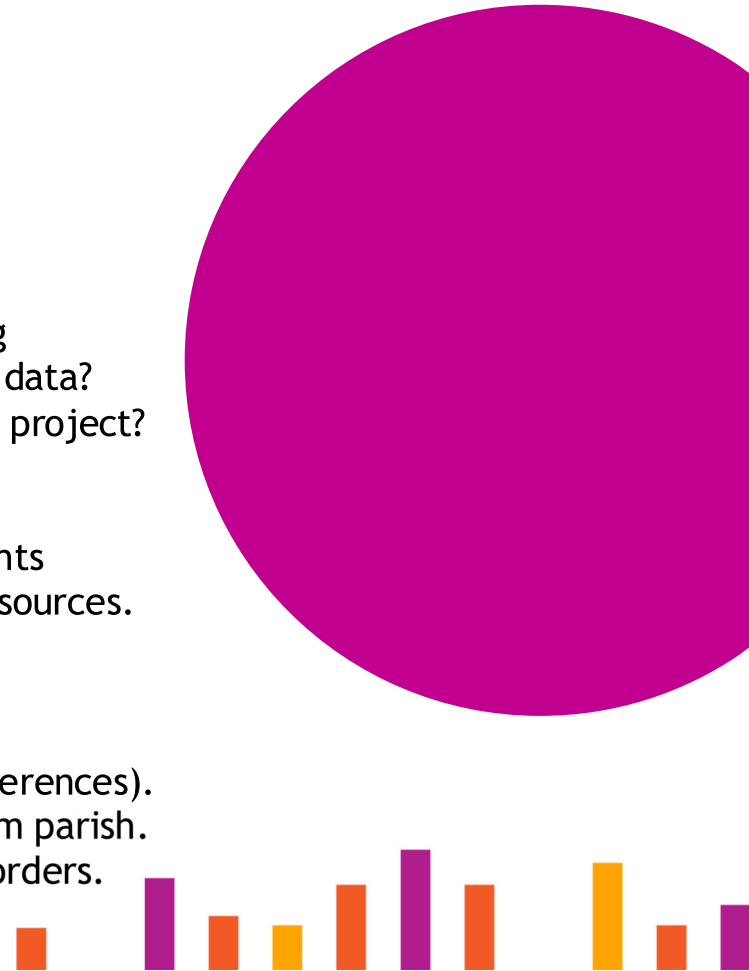
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|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>January</b><br>Snow Removal, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Inspection, Boiler Checks, Furnace Filter Changing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections                                                                                                                                                                      | <b>February</b><br>Snow Removal, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections                                                                                                                          | <b>March</b><br>Snow Removal, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Annual Furnace Servicing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections                                                | <b>April</b><br>Snow Removal, Exterior hose bibbs turned on/off, Landscaping - Spring/Fall Clean-Up Inspect/Clear Eavestroughs, Ensure Downspouts Functioning, Siding Inspections, Roof/Flashing Inspections, Window Cleaning, Masonry Inspection, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Winter Matting Supply, Pest |
| <b>May</b><br>Landscaping - Flower Beds/Shrub Trimming, Landscaping - Tree Pruning, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Furnace Filter Changing, Boilers Turned Off, A/C Turned On, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections, Interior painting: doors, frames, railings, etc. | <b>June</b><br>Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, P-trap/Toilet Seal Inspections, Faucet/Drain Inspections, Sump Pump Checks, Well Pump Checks, Backflow Preventor Inspections, Pest Activity Inspections               | <b>July</b><br>Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning Generator Inspection, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections                                                         | <b>August</b><br>Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections                                                                                                                                                                           |
| <b>September</b><br>Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections                                                                                                                                     | <b>October</b><br>Landscaping - Spring/Fall Clean-Up, Exterior hose bibbs turned on/off, Ensure Downspouts Functioning, Window Cleaning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Boilers Turned On, A/C Turned Off, Radiator Inspections, Furnace Filter Changing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections | <b>November</b><br>Snow Removal, Ensure Downspouts Functioning, Inspect/Clear Eavestroughs, Window/Door Inspections, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Furnace Filter Changing, Sump Pump Checks, Well Pump Checks, Water Softener, Winter Matting Supply, Common Area Cleaning, Pest Activity Inspections | <b>December</b><br>Snow Removal, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections                                                                                                                                                                                   |



# Preventative Maintenance

## Capital Projects and Proactive Planning

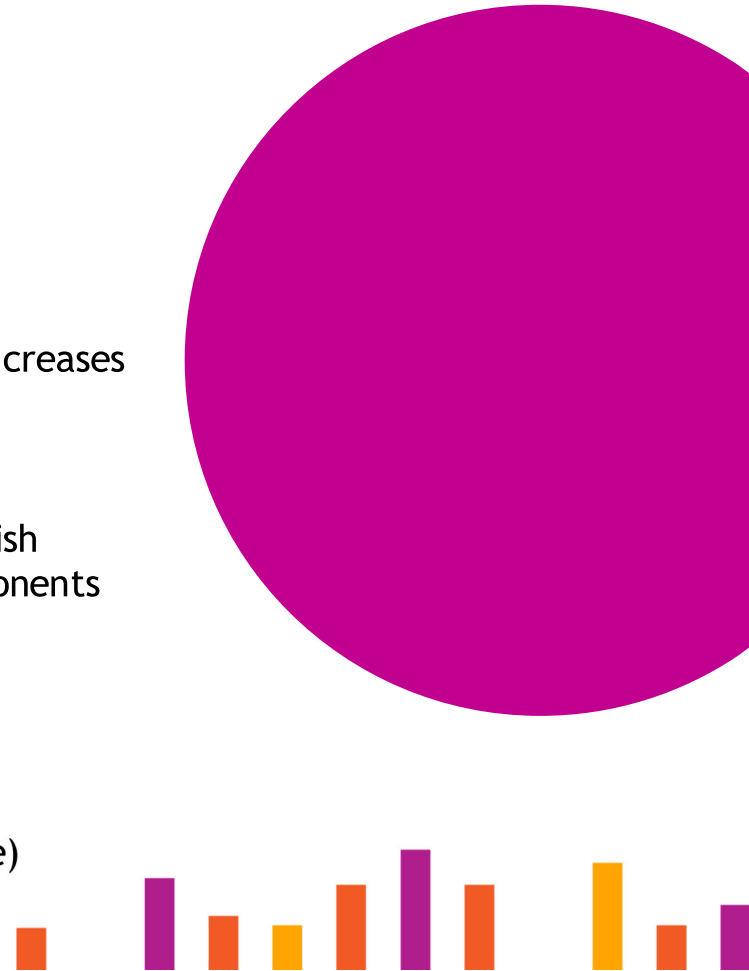
- Nature of the Project
  - What important/urgent problem requires a solution?
  - Identifying proper scope of work & project sequencing/timing
  - Does project budget align with building condition assessment data?
  - Does the parish have the resources & competency to lead the project?
- Planning Capital Expenditures
  - Advance planning around renovations or life-cycle replacements enables parishes to consider favourable funding and granting sources.
  - Also allows for time to build up cash reserves with precision.
- Contractor Relations
  - Leverage selection criteria (cost, completeness, timeline, references).
  - Identify an experienced contractor relations point-person from parish.
  - Ensure contractor will not risk contingency funds via change orders.
    - Contingency - 5-10% is standard, but we prefer more.



# Preventative Maintenance

## Reactive Maintenance and Reduction Strategies

- The true costs of reactive maintenance
    - Emergency callout fees, restorative and remediation work
    - Service disruption to parishes and potentially third parties
    - Insurance deductibles, and claims made leading to renewal increases
    - Staff and volunteer burnout
  - Strategies to reduce reactive maintenance
    - Incorporate a preventative maintenance plan within your parish
    - Conduct regular inspections of all building systems and components
    - Document all regular PM activities on an ongoing basis
    - Conduct staff and volunteer training as needed
    - Build strong vendor and third-party contractor relationships
    - Build and replenish rainy day property fund
- What is reactive maintenance?
- Fixing problems after failure (e.g., burst pipe, heating outage)



# Preventative Maintenance

## Preventative Maintenance and Insurance Benefits

- Insurance
  - Our insurer is Ecclesiastical Insurance.
  - Premium increases have been a concern over last number of years
  - In order to keep premium costs at an affordable level, property deductibles at the parish level within the ADO are set at \$2,500.
  - Our Diocese covers balances between \$2,500 and \$25,000 for repairs to property damage from its diocesan Insurance Reserve Fund.
  - Major capital projects completed by parishes must be identified in order to maintain adequate coverage.
- Preventative Maintenance
  - Insurers leverage 'claims made' to justify increases in annual premiums
  - Fires and floods are common causes of claims
  - PM programs followed diligently greatly reduce risk of fires and floods





# Questions for Joel?

