

# Historic Preservation

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*As a growing number of communities seek to preserve and enhance their historic structures and districts to stimulate tourism and economic growth, historic preservation services are in increasing demand.*

Historic preservation services embrace a range of activities that include preservation, rehabilitation, restoration, and reconstruction. Although portions of each service overlap with others, the following are the accepted definitions:

- *Preservation* applies the measures necessary to sustain the existing form, integrity, and materials of a historic property. Preservation work generally focuses on the ongoing maintenance and repair of historic features and materials rather than extensive replacement and new construction.
- *Rehabilitation* adapts a property for a compatible use through repair, alteration, and addition while preserving those portions or features that convey its historical, cultural, or architectural values.
- *Restoration* accurately depicts the form, materials, features, and character of a property as it appeared at a particular period in time. Restoration retains as much of the fabric from the historic period as possible. Inconsistent features may be removed and missing features faithfully reconstructed in accordance with the restoration period.
- *Reconstruction* depicts, with new construction, the form, materials, features, and character of a property that no longer exists, as it appeared at a particular period of time, usually in its historic location.

In the last few decades public recognition of the cultural and economic value of historic preservation has increased dramatically. As a result, the number of architects involved in preservation projects is steadily growing.

## CLIENT NEEDS

With increased public interest, more and more jurisdictions are adopting historic preservation regulations. These generally protect the appearance of existing structures in historic districts or of individually designated historic buildings. The purpose of such regulations is often aesthetic, but they are also intended to preserve community identity and historic culture. In some areas of the country, a property rights backlash is developing as property owners oppose such regulations, which they consider uncompensated “takings.”

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## Summary

### HISTORIC PRESERVATION SERVICES

#### Why a Client May Need These Services

- ▶ To conform to local historic preservation regulations
- ▶ To qualify for tax incentive programs for historic properties
- ▶ To promote community revitalization or tourism
- ▶ To demonstrate support for historic preservation interests

#### Knowledge and Skills Required

- ▶ Fundamental architectural knowledge and skills
- ▶ Knowledge of historic building styles, interiors, and landscapes
- ▶ Knowledge of historic construction methods and materials
- ▶ Familiarity with preservation technologies and techniques
- ▶ Research and investigative skills\*
- ▶ Knowledge of government historic preservation tax and grant programs

#### Representative Process Tasks

- ▶ Define project goals
- ▶ Assemble project team
- ▶ Determine significance and condition of property
- ▶ Determine applicable regulations
- ▶ Research history of property and document existing conditions
- ▶ Develop design concept and cost estimate
- ▶ Develop final design
- ▶ Participate in construction procurement and construction phases

\* Special archaeological expertise may be required for certain sites.

Tax incentive and grant programs at the federal, state, and local levels directly stimulate the market for preservation services. Owners of historic houses already qualify for federal rehabilitation tax credits, and it appears likely that even stronger federal tax incentives for homeowners will be passed. For business owners and community groups, the federal government and many states offer an array of tax incentive and grant programs. Many of these programs link historic preservation to urban revitalization and economic development objectives.

The resources available to those working on historic properties make them attractive to many different types of clients for a variety of reasons. Architects offering historic preservation services must be familiar with the government programs that support preservation activities as well as knowledgeable about historic architecture.

***Compliance with preservation regulations.*** Many clients—homeowners as well as institutional and corporate clients—seek historic preservation services because their properties are in a location subject to historic preservation regulations. A key service historic preservation architects can provide for these clients is guiding a project through the approval process administered by increasingly overburdened state and local preservation offices.

***Qualification for funding and tax credits.*** An architect who is well versed in tax credit and grant programs for historic preservation can be of great value to clients who may not even realize their property has historical significance. Buildings need only be 50 years old to qualify for listing in the National Register of Historic Places, which is a prerequisite for many funding incentive programs. Many modern buildings are now reaching the age of eligibility. As well, the criteria for landmark status have widened considerably in recent years to include buildings that are significant largely in terms of cultural history rather than architectural value; an example might be the first McDonald's restaurant. Because the availability of tax credits or grants can make the critical difference in the financial feasibility of a project, architects familiar with the process and eligibility requirements for taking advantage of tax credits and incentives offer a valuable service.

***Determination of architectural significance and development of a preservation plan.*** Architects who offer historic preservation services advise their clients on preservation, rehabilitation, restoration, or reconstruction approaches appropriate for a project. The architect determines which parts of a building(s) are original and which are later additions, interprets findings for the client, and coordinates the work of other specialists required for a project. The historical importance of the persons or events related to the project and the project's aesthetic value, architectural character, existing condition, and future function are some of the factors considered in the development of a preservation approach.

In some cases a client may discover during site analysis that a property has historical significance. The architect may then be required to oversee archaeological activity and make recommendations for proper handling of historic structures or resources found on the site. Depending on the locale, these activities can be regulated by state or local historic preservation regulations.

Government clients hire historic preservation architects for urban and regional planning projects (the majority of which now contain a historic preservation element), for community revitalization projects that encourage tourism and/or economic growth, and for work on public parks and historic sites. Public agencies upgrading their historic buildings for continued or adaptive reuse sometimes require design teams to include an architect with expertise in historic preservation.

Government agencies face increasing public opposition to construction of new transportation facilities due to concerns about destruction of cultural and natural resources. In order to gain approval for these projects, agencies often package historic preservation programs with civil engineering projects. For this reason civil engineering firms often engage in subcontracts with architects who have historic preservation expertise.

***Correct handling of historic materials.*** Many architecture firms specialize in building preservation, historic reconstruction, and preservation planning. These firms offer services that help other architecture and planning firms with issues related to archaic materials, systems, and elements that are the character-defining features of historic buildings. Many architecture firms may consider themselves capable of working on historic buildings because of their experience with rehabilitation work. However, unless they are true specialists, they often are not aware that improper treatment of archaic materials and systems will

accelerate the deterioration or failure of buildings rehabilitated using contemporary approaches.

The burgeoning of historic preservation work has fostered the emergence of sophisticated methodologies and technologies. Architects frequently consult with historians or with a growing cadre of consultants who specialize in preservation technology. These experts use new scientific technologies for dating and identifying the exact type of building materials originally used. They also help locate supply sources. The Internet has helped information flow, making sources of specialized services and products easier to locate.

Services related to historic preservation include master planning, urban planning, site analysis, research and assessments, programming, building design, construction documents, construction procurement, construction contract administration, and landscape design.

## SKILLS

Providing preservation services requires well-developed abilities in analysis, recognition, and restoration of buildings and other historic resources. The practitioner needs knowledge of historic building techniques and materials; expertise in architectural history; specialized experience in research, fieldwork, and analysis of historic artifacts; an understanding of techniques for conserving architectural materials; and the skills and experience to investigate, document, research, and analyze finishes, lighting, furnishings, and decorative arts in building interiors.

**Training and experience.** Some clients have defined training and experience requirements. The U.S. Department of the Interior, for example, requires that professionals providing “historic architecture” services for its projects must meet the department’s guidelines for rehabilitating historic structures. At minimum, these individuals must have a professional degree in architecture or a state license to practice architecture plus either at least one year of graduate study in historic preservation, American architectural history, preservation planning, or a closely related field or at least one year of full-time professional experience on historic preservation projects. The Interior Department’s professional qualifications standards further specify that the year of graduate study or experience must include detailed investigations of historic structures, preparation of historic structure research reports, and preparation of plans and specifications for preservation projects.

**Specialized skills.** The architect who practices historic preservation must keep abreast of government programs that affect projects with historical significance. Networking is important so that the firm can locate appropriate consultants and identify suppliers of services and building products that may no longer be available in the mainstream.

Specialists that may be required include historians, archaeologists, architecture conservators, and historic interiors specialists. Other related disciplines include structural, mechanical, and electrical engineers and landscape architects.

## PROCESS

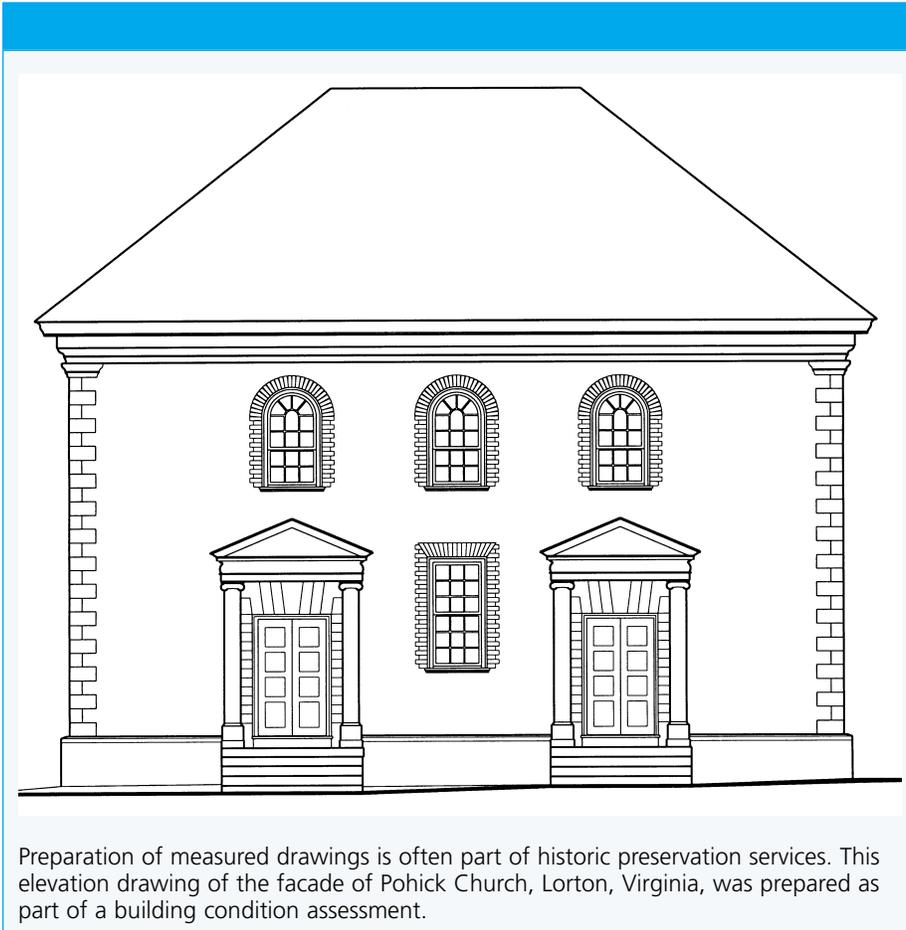
Often historic preservation projects require quite a lot of predesign and research time. Coordination with regulatory agencies is also a step that should be initiated early in the process to be certain the work that is planned will be found acceptable by zoning agencies or agencies managing grant or tax incentive programs.

**Factors affecting the scope of services.** Among the factors that can affect the scope of services for a historic preservation project are the basic nature of the effort (to preserve, rehabilitate, restore, or reconstruct), the applicable historic preservation regulations, the significance of the property and facility, and the condition and integrity of the structure.

**Teaming approach.** When possible, it is best to team with structural, mechanical, and electrical engineers and landscape architects who have experience in the special procedures required for preservation of historic structures. Architects who have minimal or no experience with historic preservation projects should include a historic preservation architect on the team. The role of this specialist would be to perform research and assessments, prepare the necessary preservation documents, and provide technical expertise for the proper treatment of archaic materials and systems.

## Steps in a Historic Preservation Project

**Predesign and research.** To accomplish the items listed here generally requires the participation of a few specialists in historic architecture, historical research, and archaeology as well as someone familiar with the applicable codes and regulations.



Preparation of measured drawings is often part of historic preservation services. This elevation drawing of the facade of Pohick Church, Lorton, Virginia, was prepared as part of a building condition assessment.

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- Preliminary analysis and evaluation of existing conditions.
- Programming to determine the intended function and contemporary use of the site, structure, and building.
- Feasibility study to investigate code requirements and regulations and to evaluate the technical and economic feasibility of the proposed work.
- Documentation of existing conditions with photographs and measured drawings and, when possible, comparison of original contract documents with as-built conditions.
- Preparation of Historic American Buildings Survey/Historic American Engineering Record (HABS/HAER) documentation, which includes large-format photographs and measured drawings that record the original construction. (Such documentation can be placed in the Library of Congress.)
- Historical research to study and prepare a report of documents, old photographs, and other data concerning the project, its architectural and construction history, and the people associated with it.

- Archaeological research to investigate the prehistoric, historic, or industrial nature of the project area and, particularly on historically important sites, to recover, restore, and evaluate artifacts.
- Architectural and engineering investigation to determine which elements of the structure are original and which are not, together with a sequence and dates of construction.
- Development of design concept or preliminary design to illustrate proposed development, materials, engineering concepts, alternatives, and other relevant elements of the work.
- Preliminary cost estimate to identify probable costs to help the client establish a project budget.
- Preliminary report that compiles written data, drawings, photographs, and other information into what is commonly called a historic structures report. This may also include assistance in preparing applications for inclusion in federal, state, and local inventories such as the National Register of Historic Places or for funding through federal or state agencies.

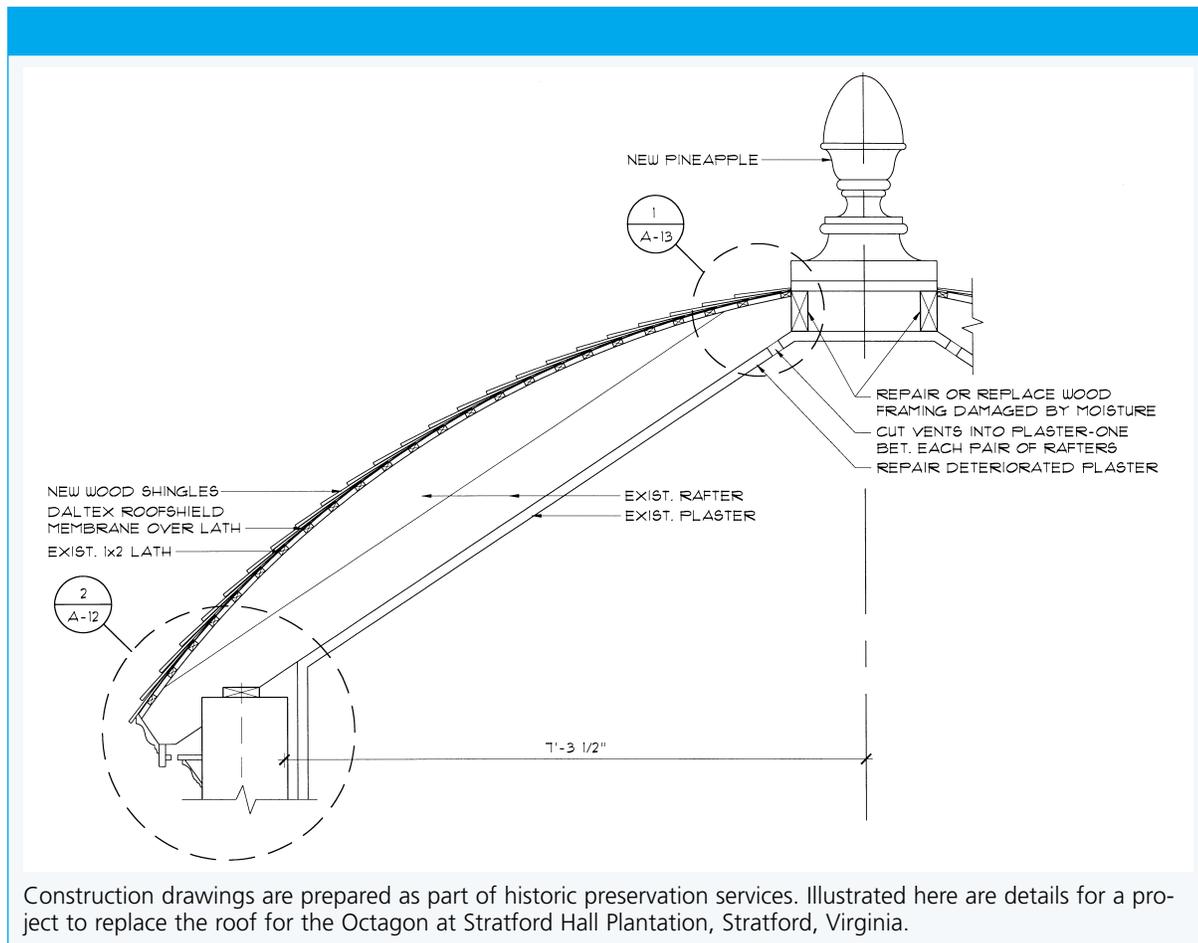
**Design phase.** Issues related to working on a historic structure must be coordinated with the standard steps of the building design process throughout design and construction.

- Coordination of preservation issues with architectural design and engineering development for the building
- Coordination of preservation issues with the preparation of outline specifications
- Coordination of preservation issues with the preparation of a probable statement of costs for the work

**Construction documents phase.** Issues that must be considered in this phase include the following:

- Coordination of preservation issues with the preparation of construction documents, including working drawings and specifications
- Coordination of preservation issues with the preparation of a final cost estimate for the work
- Coordination of preservation issues with bidding or negotiations for procurement of construction services
- Construction contract administration
- Coordination of preservation issues with construction observation and construction contract administration services

Deliverables may include a historic structures report and/or an assessment and conditions report. At the completion of a significant historic project, a cycle maintenance report often is completed. Other types of reports, such as a determination of eligibility and a statement of effects, may be required by authorities having jurisdiction over a project, such as local historic landmark and historic district review boards and the state historic preservation officer.



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The AIA provides a contract document designed especially for these types of architectural services. The AIA suggests a two-part agreement:

**B102–2007, Standard Form of Agreement Between Owner and Architect without a Predefined Scope of Architect’s Services** provides terms and conditions only.

**B205–2007, Standard Form of Architect’s Services: Historic Preservation** provides the architect’s scope of services only.

Together they equal a complete owner-architect agreement.

AIA Document B205<sup>TM</sup>–2007 establishes duties and responsibilities where the architect provides services for projects that are historically sensitive. The range of services the architect provides under this scope spans the life of the project and may require the architect to be responsible for preliminary surveys, applications for tax incentives, nominations for landmark status, analysis of historic finishes, and other services specific to historic preservation projects. B205–2007 is a scope of services document only and may not be used as a stand-alone owner/architect agreement. NOTE: B207–2007 replaces AIA Document B205<sup>TM</sup>–2004 (expired May 31, 2009).

For more information about AIA Contract Documents, visit [www.aia.org/contractdocs/about](http://www.aia.org/contractdocs/about)

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