

Types of Historic Preservation Planning Studies

Historic Building Assessment with Preservation Guidelines

Purpose: These reports are intended as road maps for the re-use of historic buildings and structures. They are prepared by historic preservation professionals and are often multi-disciplinary, addressing the history and function of the building(s) over time as well identifying and assessing the building's preservation needs and priorities. They provide prioritized recommendations, following the appropriate Secretary of the Interior's Standard for the Treatment of Historic Properties, for the next steps in a building's rehabilitation or restoration.

- Appropriate for non-museum quality historic buildings and structures ready to undergo restoration or rehabilitation
- To be completed by preservation professional in conjunction with building contractor or architect (with historic building experience)
- Exterior inspection noting existing conditions, materials, construction methods (with photos)
- Interior inspection noting existing conditions, materials, and finishes (with photos)
- Includes analysis of character-defining features, including the interior, exterior and site
- Significance of character-defining features will be prioritized from high to low
- Recommendations for rehabilitation will be prioritized, with the most urgent or short-range priorities to include cost estimates

Report Outline:

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- Cover Page
- Paginated Table of Contents
- Executive Summary/Introduction
- History and Development of the Property including a Statement of Significance
- Architectural Description (including analysis of character defining features)
- Assessment of Condition (site, exterior, and interior)
- Code and accessibility analysis
- Recommended Rehabilitation Approach (with short-, mid-, and long-range preservation needs and cost estimates for short-range projects), as well as recommendations for further studies, if appropriate
- Photographs of the property and significant features
- Photographs detailing areas needing attention
- Sketch Site plan
- Sketch floor plans
- Appendices (e.g., Individual Inventory Form/Determination of Eligibility, National Register of Historic Places nomination form, Secretary of the Interior's Standards, relevant Preservation Briefs, etc.)

Historic Structure Report

Purpose: Much like the Historic Building Assessment with Preservation Guidelines, an Historic Structure Report (HSR) is a building's road map for rehabilitation and re-use. However, the HSR provides a more detailed and comprehensive analysis of the building and pays particular attention to its future re-use. The report will tell the owner or developer what will and will not work in terms of use.

- Appropriate for complex properties or highly significant properties with exceptional integrity or a complex of buildings needing a comprehensive reuse and rehabilitation plan
- To be completed by preservation professional in conjunction with an interdisciplinary team of professionals including, but not limited to, a building contractor or architect (with historic building experience), engineer, marketing professional, and/or interpretive specialist
- Thorough history of building and context (designers, builders, owners, occupants, and others associated with its history and development)
- Comprehensive building investigation, evaluation and analysis of significant features (prioritized)
- Recommended Rehabilitation Approach (with short-, mid-, and long-range preservation needs and estimated costs), as well as recommendations for further studies, if appropriate
- Measured Drawings
- Detailed reuse plan

Report Outline (may be customized to meet the need of the project):

- Cover Page
- Paginated Table of Contents
- Executive Summary
 - Scope of study
 - Purpose statement
 - Overall treatment approach
 - Summary of findings and recommendations
- Project Directory
 - Sponsoring individuals or organization(s)
 - Consultants
 - Funding sources
- Introduction
 - Property significance
 - Project methodology
- Developmental History
 - Historical overview
 - Contextual history in region
 - Property and site history
 - Potential below-grade resources

- Chronology of Development and Use
- Physical Description (with photos)
 - Site
 - Building exterior and interior
 - Architectural plans and elevations (existing)
- Statement of significance
- Existing Conditions Assessment (with photos)
 - Site features
 - Building exterior and interior
- Identification of Significant Features
- Treatment Analysis
 - Treatment philosophy
 - Use and interpretation analysis
 - Code and accessibility analysis
 - Work Recommendations and Alternatives
 - Landscape and site
 - Building exterior and interior
 - Architectural plans and elevations (proposed)
 - Summary of recommendations
 - Preliminary estimates of probable costs
 - Phasing recommendations
- Appendices
 - Bibliography
 - Individual Inventory Form/Determination of Eligibility
 - National Register of Historic Places nomination form
 - Structural Evaluation
 - Building Analysis
 - Paint Analysis
 - Mortar Analysis
 - Maintenance/Stewardship Plan
 - Previous Reports or Studies
 - Secretary of the Interiors Standards
 - Relevant Preservation Briefs

For more information about historic structure reports and other preservation plans see:

Preservation Brief 43: “The Preparation and Use of Historic Structure Reports”
(<https://www.nps.gov/TPS/HOW-TO-PRESERVE/briefs/43-historic-structure-reports.htm>)

“Historic Structure Reports and Preservation Plans: A Preparation Guide”
(<https://www.nj.gov/dep/hpo/4sustain/preparehsr.pdf>)