

# LCHIP

## Land & Community Heritage Investment Program



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### Guidance Document: Preservation Planning Overview

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Preservation plans are reports that provide guidance for preserving historic resources, serving as road maps for their ongoing use and re-use. They provide prioritized recommendations, following the Secretary of the Interior's Standards for the Treatment of Historic Properties, often with an estimate of probable costs, for the next steps in a resource's preservation or rehabilitation.

#### Planning studies are key adjuncts to LCHIP's rehabilitation applications:

1. Prospective LCHIP rehab projects with a total project cost of \$50,000 or more need to have a completed planning study included with their applications.
2. Modernization (work to improve access, code-compliance, energy efficiency, heating, plumbing, etc.) and routine maintenance activities, are not eligible for inclusion in LCHIP projects, unless those activities are necessary to fulfill the recommendations of an Historic Structure Report or other preservation plan for the property.

#### Your Preservation Plan:

1. Is tailored to the needs of the resource and the people who maintain, use, and enjoy it.
  - a. What is the resource's history and significance?
  - b. What are the features – both primary and secondary – that help define the resource's historic character?
  - c. What is the condition of each of the various elements and parts of the resource?
  - d. Do possible future treatments reflect a sound grasp of the historic resource's needs?
  - e. If modernization is likely to be undertaken sometime in the future, will the new work be done in a way that safeguard's the resource's historic character?
  - f. Will prospective work on the resource embody recognized best practices in historic preservation?
  - g. Some may focus on the existing historic fabric of the resource, highlighting conditions such as these:
    - i. There is chronic moisture problem in the basement or crawlspace that needs to be addressed
    - ii. The existing roof has reached the end of its useful life and needs to be replaced
    - iii. Wooden elements of the building are deteriorating and will need to be repaired
    - iv. Masonry is at risk, due to crumbling old mortar
    - v. Glazing putty is falling out of historic windows, which are drafty
  - h. If conditions warrant, there may also be discussion of modernization activities if, for example:
    - i. The second floor of the building is unusable because egress from that level does not comply with fire and life-safety codes

- ii. Handicapped accessibility to certain areas is poor or nonexistent
- iii. Installation of a fire-suppression (sprinkler) system may be necessary to safely utilize a space
- iv. Restroom facilities are inadequate for a building that will be open to the public
- v. Installing storm windows would be a good idea to reduce energy costs to heat a building
- i. typically include a mix of text, historic and contemporary photographs, and a site plan.
- j. Architectural plans, showing the existing (as-built) plans and elevations of a building, along with possible re-designs to accommodate new uses, may be a good idea to include if the building needs to be adapted to better fulfill its use.

### **Historic Structure Report (HSR)**

*The fullest and most-developed form of a preservation plan. And they are authored by larger teams of professionals (such as an historic preservation professional/architectural historian, architect, engineer, general contractor, timber framer, expert in historic masonry, codes consultant, etc.).*

#### 1. They are appropriate for:

- a. larger structures,
- b. those with more problems,
- c. those experiencing a change of use,
- d. those facing major challenges to complying with modern codes, and/or
- e. those facing significant new construction and/or additions.

#### 2. Typical Outline for an Historic Structure Report:

- a. Table of Contents
- b. Introduction/Executive Summary
- c. Thorough History and Development of the Property and its context (designers, builders, owners, occupants, and others associated with its history and development) including a chronology, historic photographs, a Statement of Significance, and a bibliography
- d. Comprehensive Physical/Architectural Description (site, exterior, and interior; including site/floor plans, photographs of significant features, and an analysis of primary and secondary character-defining features)
- e. Conditions Assessment (site, exterior, and interior; including photographs detailing areas needing attention)
- f. Historic Preservation Objectives (rehabilitation, restoration, etc.)
- g. Requirements for Work (laws, regulations, and functional requirements)
- h. Recommendations for work (with short-, mid-, and long-range preservation needs and cost estimates for short-range projects), as well as recommendations for further studies, if appropriate
- i. Detailed reuse plan
- j. To-scale, measured architectural drawings of the structure as built and as proposed
- k. Appendices (can include previous reports, engineering assessments, determinations of eligibility, nominations to the National or State Register of Historic Places, Secretary of the Interior's Standards, a list of relevant Preservation Briefs, etc.)

## Historic Building Assessments (HBA)

*A shorter, cheaper, and less detailed report. And they may be authored by two people (typically an historic preservation professional/architectural historian and an architect or general contractor).*

1. They are appropriate for:
  - a. smaller structures,
  - b. those with fewer problems,
  - c. those not experiencing a change of use,
  - d. those not facing major difficulties in complying with modern codes, and/or
  - e. those not requiring significant new construction or new additions.
  
2. Typical Outline for an Historic Building Assessment:
  - a. Table of Contents
  - b. Introduction/Executive Summary
  - c. History and Development of the Property (including historic photographs)
  - d. Statement of Significance
  - e. Physical/Architectural Description (site, exterior, and interior; including sketch site/floor plans, photographs of significant features, and an analysis of Character-Defining Features)
  - f. Conditions Assessment (site, exterior, and interior; including photographs detailing areas needing attention)
  - g. Recommendations for work (with short-, mid-, and long-range preservation needs and cost estimates for short-range projects), as well as recommendations for further studies, if appropriate
  - h. Appendices (can include previous reports, engineering assessments, determinations of eligibility, nominations to the National or State Register of Historic Places, Secretary of the Interior's Standards, a list of relevant Preservation Briefs, etc.)

Information about Historic Structure Reports, including a discussion on their content and organization, can be found here (<https://www.nps.gov/TPS/HOW-TO-PRESERVE/briefs/43-historic-structure-reports.htm>).