**County of Loudoun**

**Department of Planning**

**MEMORANDUM**

**DATE:** April 17, 2009

**TO:** Judi Birkitt, Project Manager, Land Use Review

**FROM:** Heidi Siebentritt, Historic Preservation Planner, Community Information and Outreach

**SUBJECT: ZMAP 2008-0021 Kincora Village Center**

## Background

The applicant is requesting a Zoning Map Amendment (ZMAP) of an approximately 336.64 acre property located in the southwest quadrant of the Route 7 and Route 28 interchange (subject property). The subject property is located within the Route 28 Tax District and is currently zoned Planned Development-Industrial Park (PD-IP) under the 1972 Zoning Ordinance. The ZMAP application requests that the property be re-zoned to Planned Development- Mixed Use Business (PD-MUB).

Staff notes that a special exception application (SPEX 2008-0054) for a property adjacent to the subject property to permit a minor league ball field and auxiliary uses is currently under County review.

## Plan Compliance

The subject property is governed by the policies of the Revised General Plan and the Heritage Preservation Plan.

## Analysis

A Phase 1 archaeological survey was conducted on the 420-acre A.S. Ray property. The survey report, dated March 2001, was prepared by Thunderbird Archeology. The subject property represents the majority of the surveyed tract of land. The survey report was first submitted to the County for review as part of ZMAP 2006-0016, Kincora, which was denied by the Board of Supervisors on November 14, 2007. Ten archaeological sites previously identified by ground surface examination were re-identified and located during the 2001 survey, and six additional sites were located. Of the sixteen recorded sites, two sites were found to be potentially significant, warranting impact mitigation.

Archaeological Resources

Site 44LD421 was identified adjacent to Route 28 (Sully Road). This site is the historic Kilgour/Hummer Cemetery. In early 2007, the human remains from the cemetery were exhumed and re-interred at the Chestnut Grove Cemetery in Herndon. Therefore, this resource has been removed and no further impact mitigation is necessary.

Site 44LD729 was also located during the 2001 Phase 1 archaeological survey. A Phase 2 evaluation of the site was conducted and a report prepared in January 2008 and submitted to the County with the subject application. Site 44LD729 has been interpreted as the remains of an 18th century domestic site likely associated with a tenant farmer of poor or moderate means. Artifact locations and densities and the presence of large, intact pit feature suggest that the 44LD729 represents the remains of at least one building. The consultant has recommended this site to be eligible for listing in the National Register of Historic Places. Therefore, avoidance of the site or Phase 3 excavation of the site is warranted.

The applicant's Statement of Justification (page 9) states that Phase 3 excavation of site 44LD729 is planned and that a Memorandum of Understanding (MOU) outlining the scope of work and testing methodology has been executed with the Virginia Department of Historic Resources (VDHR). Staff requests a copy of the MOU and a copy of the Phase 3 report (upon completion) for the County file.

Broad Run Toll House and Bridge

The Broad Run Toll House and Bridge (Virginia Department of Historic Resources #53-110) is located north of the project area near the intersection of Route 7 and Route 28. The house and bridge were constructed in 1820 and represent the initiation of Route 7 as a turnpike from Winchester to the port of Alexandria. These resources are landmarks of Loudoun County's early transportation and commerce systems. As such, the toll house and associated stone bridge which spanned the Broad Run until the 1990's, were listed in the National Register of Historic Places as early as 1969. The National Register nomination notes the rarity of this type of resource in the state of Virginia. The stone bridge collapsed in the 1990's. The remnants of the stone bridge trusses and cut stone rubble remain on the site. Although an addition to the house was constructed in the mid 20th century, the original exterior of the stone toll house structure appears to be intact, retaining its historic integrity. A copy of the 1969 National Register nomination for the Broad Run Toll House and Bridge is attached for reference (Attachment 1).

In recognition of the local and national significance of the resource, the County designated the Broad Run Toll House and Bridge as a local historic site district (HS) in 1972. The purpose and intent of historic district designation is the

protection and enhancement of areas of special historic interest or value which reflect the County's heritage *(1972 Zoning Ordinance, Section 750.1.2 and Revised 1993 Zoning Ordinance Section 6-1800)*. The effect of such designation is the required review and approval by the County for all exterior alterations to structures within the district, including the proposed demolition or relocation of any structure. County approval is also required for proposed new construction within the HS district *(1972 Zoning Ordinance, Section 750.8 and 750.9 and Revised 1993 Zoning Ordinance, Section 6-1902)*. Staff recommends that the applicant contact Department of Planning staff to discuss the HDRC application process at the earliest convenience.

The County's Heritage Preservation Plan states that new development should first and foremost seek to minimize adverse impacts on heritage sites, including historic standing structures and that new development should be sited and designed to be compatible with heritage resources *(Heritage Preservation Plan, Chapter 9, Development Review, Policies 1 and 2)*. The Plan further states that heritage sites that have been listed in the National Register of Historic Places and designated as HS districts under the provisions of the zoning ordinance will be considered priority sites for preservation during the development process *(Heritage Preservation Plan, Chapter 9, Development Review, Policy 3)*. The County's first priority is the preservation of these resources in the context of their historic settings *(Heritage Preservation Plan, Chapter 9, Policy 2)*.

Chapter 10 of the Heritage Preservation Plan provides "Guidelines for the Preservation of Historic Standing Structures." The Heritage Plan states that all new land development applications will be evaluated against these Guidelines (Heritage Preservation Plan, Chapter 9, Development Review, Policy 9). Chapter 10 of the Heritage Preservation Plan is attached for reference (Attachment 2). Also attached is the section of the County's Historic District Guidelines relating to the relocation or demolition of structures with historic overlay districts (Attachment 3).

The 1990 widening of Route 7, though not destroying the structures themselves, compromised the historic setting of these structures and increased the difficulty of adaptively re-using the Toll House. Because construction of the remainder of Pacific Boulevard is proposed as part of the subject development application, depending on the ultimate alignment of the road, the Toll House will either be destroyed or further compromised. It is staff's understanding from a conversation with the applicant at a March 30 meeting with referral agencies that the Toll House property is under contract with the applicant. It is critical that the structural condition, historic architectural integrity and historic context of the toll house be assessed and documented. To this end, staff recommends that a Historic Standing Structures Report (HSR) as defined in the National Park Service's Preservation Brief #43, be conducted. The HSR will provide the base line data necessary to make decisions on how best to preserve the resource and to

convey its history to the residents of the County. Preservation Brief #43 is attached for the applicant's reference (Attachment 4).

Coordination with VDHR

The application materials state that permits from the Army Corps of Engineers is required for this project. Because federal permits are needed, the development proposal will be reviewed by the Virginia Department of Historic Resources (VDHR) per Section 106 of the National Historic Preservation Act of 1966 (as amended). Impacts to resources listed in, or eligible for, the National Register of Historic Places may require mitigation per VDHR. Staff recommends that the applicant consult with VDHR as early as possible to ensure that impact mitigation that may be proffered to the County as part of an approval of this application are consistent with VDHR's requirements under Section 106. This recommendation pertains specifically to the Broad Run Toll House property, since the MOU for site 44LD729 has already been addressed.

**Recommendation**

Staff strongly recommends that the applicant schedule a meeting with staff from the Department of Planning and the Department of Parks, Recreation and Community Services to discuss viable adaptive re-use options to ensure the preservation of this important resource. Staff further recommends the completion of an HSR by a qualified professional for a full and complete assessment of the toll house structure so that informed decisions on the treatment and adaptive re-use of this structure and site can be made.

Staff reiterates that any alteration of the toll house structure, including its relocation or demolition, will necessitate HDRC review and approval. Further, staff recommends early coordination with VDHR on mitigation impact strategies for this resource and requests copies of any pertinent correspondence on this issue to ensure that recommendations and required actions are consistent and or compatible on the county and state level.

Staff respectfully requests a copy of the MOU and Phase 3 archaeological survey report for site 44LD729.

cc: Michael "Miguel" Salinas, Program Manager, CIO
Julie Pastor, AICP, Director

Form 10-300
(July 1969)

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

# NATIONAL REGISTER OF HISTORIC PLACES INVENTORY – NOMINATION FORM

*(Type all entries – complete applicable sections)*

| STATE: Virginia | |
|---|---|
| COUNTY: Loudoun | |
| FOR NPS USE ONLY | |
| ENTRY NUMBER | DATE |
| | |

SEE INSTRUCTIONS

## 1. NAME

COMMON: Broad Run Bridge and Toll House

AND/OR HISTORIC: Broad Run Bridge and Toll House

## 2. LOCATION

STREET AND NUMBER: At intersection of Rt. 7, Rt. 28, and Broad Run.

CITY OR TOWN: (Sterling vicinity)

| STATE | CODE | COUNTY: | CODE |
|---|---|---|---|
| Virginia | 45 | Loudoun | 107 |

## 3. CLASSIFICATION

| CATEGORY (Check One) | OWNERSHIP | | STATUS | ACCESSIBLE TO THE PUBLIC |
|---|---|---|---|---|
| ☐ District ☒ Building | ☒ Public | Public Acquisition: | ☒ Occupied | Yes: |
| ☐ Site ☒ Structure | ☒ Private | ☐ In Process | ☒ Unoccupied | ☐ Restricted |
| ☐ Object | ☐ Both | ☐ Being Considered | ☐ Preservation work in progress | ☒ Unrestricted |
| | | | | ☐ No |

PRESENT USE *(Check One or More as Appropriate)*

| | | | | |
|---|---|---|---|---|
| ☐ Agricultural | ☐ Government | ☐ Park | ☐ Transportation | ☐ Comments |
| ☐ Commercial | ☐ Industrial | ☒ Private Residence | ☒ Other (Specify) Bridge | |
| ☐ Educational | ☐ Military | ☐ Religious | | |
| ☐ Entertainment | ☐ Museum | ☐ Scientific | | |

## 4. OWNER OF PROPERTY

OWNER'S NAME: Commonwealth of Virginia - Department of Highways

STREET AND NUMBER: 1401 E. Broad Street

| CITY OR TOWN: | STATE: | CODE |
|---|---|---|
| Richmond | Virginia | 45 |

## 5. LOCATION OF LEGAL DESCRIPTION

COURTHOUSE, REGISTRY OF DEEDS, ETC: Loudoun County Court House

STREET AND NUMBER:

| CITY OR TOWN: | STATE | CODE |
|---|---|---|
| Leesburg | Virginia | 45 |

## 6. REPRESENTATION IN EXISTING SURVEYS

TITLE OF SURVEY: Virginia Historic Landmarks Commission Report #53-110

DATE OF SURVEY: 1969 ☐ Federal ☒ State ☐ County ☐ Local

DEPOSITORY FOR SURVEY RECORDS: Virginia Historic Landmarks Commission

STREET AND NUMBER: Room 1116, Ninth Street State Office Building

| CITY OR TOWN: | STATE: | CODE |
|---|---|---|
| Richmond | Virginia | 45 |

STATE: Virginia

COUNTY: Loudoun

FOR NPS USE ONLY
ENTRY NUMBER
DATE

Att 1

Form 10-300a
(July 1969)

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

**NATIONAL REGISTER OF HISTORIC PLACES**
**INVENTORY - NOMINATION FORM**

*(Continuation Sheet)*

| STATE | |
|---|---|
| Virginia | |
| COUNTY | |
| Loudoun | |
| FOR NPS USE ONLY | |
| ENTRY NUMBER | DATE |
| | |

*(Number all entries)*

4. James R. Eberly (owner of Toll House)
Route 1
Ashburn, Virginia

## 7. DESCRIPTION

| CONDITION | (Check One) | | | | | |
|---|---|---|---|---|---|---|
| | ☐ Excellent | ☐ Good | ☒ Fair | ☐ Deteriorated | ☐ Ruins | ☐ Unexposed |
| | (Check One) | | (Check One) | | | |
| | ☐ Altered | ☒ Unaltered | ☐ Moved | ☒ Original Site | | |

DESCRIBE THE PRESENT AND ORIGINAL *(if known)* PHYSICAL APPEARANCE

Broad Run Bridge and Toll House are both stone objects of considerable simplicity. The bridge itself consists of a double span of arches supported by a central pier and massive abutments on either bank. Conical buttressing flanks the arches and squared-off buttresses support the stone walls on land. The asphalt-covered roadway rises at the center of the bridge span, and the low parapet walls which line this roadway connect to the stone toll house at the western end of the bridge on the south side. The simplicity of the original one-story, three-bay structure changed considerably after its enlargement by three wings, but the old walls are relatively intact. Little original interior fabric remains. The bridge is now owned by the Department of Highways of the Commonwealth of Virginia, while the toll house is now a private residence.

SEE INSTRUCTIONS

Form 10-300a
(July 1969)

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

**NATIONAL REGISTER OF HISTORIC PLACES**
**INVENTORY - NOMINATION FORM**

| STATE | |
|---|---|
| Virginia | |
| COUNTY | |
| Loudoun | |
| FOR NPS USE ONLY | |
| ENTRY NUMBER | DATE |
| | |

Broad Run Bridge and Toll House
*(Continuation Sheet)*

7. DESCRIPTION

*(Number all entries)*

The causeway at the west end of the bridge was damaged by flood in June 1972.

## 8. SIGNIFICANCE

**PERIOD** *(Check One or More as Appropriate)*

| | | | |
|---|---|---|---|
| ☐ Pre-Columbian | ☐ 16th Century | ☐ 18th Century | ☐ 20th Century |
| ☐ 15th Century | ☐ 17th Century | ☒ 19th Century | |

**SPECIFIC DATE(S)** *(If Applicable and Known)*

**AREAS OF SIGNIFICANCE** *(Check One or More as Appropriate)*

| | | | |
|---|---|---|---|
| Aboriginal | ☐ Education | ☐ Political | ☐ Urban Planning |
| ☐ Prehistoric | ☐ Engineering | ☐ Religion/Philosophy | ☐ Other *(Specify)* |
| ☐ Historic | ☐ Industry | | _____ |
| ☐ Agriculture | ☐ Invention | ☐ Science | _____ |
| ☐ Architecture | ☐ Landscape Architecture | ☐ Sculpture | _____ |
| ☐ Art | | ☐ Social/Humanitarian | _____ |
| ☒ Commerce | ☐ Literature | | _____ |
| ☐ Communications | ☐ Military | ☐ Theater | _____ |
| ☐ Conservation | ☐ Music | ☒ Transportation | _____ |

**STATEMENT OF SIGNIFICANCE**

On February 3, 1809, the General Assembly passed an Act Incorporating The Leesburg Turnpike Company for the purpose of building a road from Leesburg to the Little River Turnpike at Alexandria, or for at least ten miles in that direction. The road, which was to be fifty feet wide, was to be paved for only eighteen feet. In February, 1816, an Act creating a "Fund for Internal Improvement" established a fund to consist of shares, held by the Commonwealth, in various turnpikes, canals and banks, and of dividends received from such stock. Thus, the need for better inland communication to promote commerce and travel to the west was recognized by the government.

The work on the Leesburg Pike progressed slowly, but by 1822 the road had been completed to Dranesville, a distance of fourteen miles. One of the toll gates erected at this time may have been at Broad Run Bridge, 5½ miles east of Leesburg, which was constructed as part of the Leesburg Pike. There is reputed to be a stone with an 1820 date on the bridge, and this is a logical date of construction. At least three successive wooden bridges had been erected over Broad Run between 1771 and 1803, but these had all washed away. The stone bridge was in use until 1949 when it was replaced by a concrete and steele bridge.

By 1834 The Leesburg Turnpike Company found itself in debt due to decreased tolls and an increase in the cost of repairs. The flood of September, 1843, which washed away the bridge over Goose Creek, and the completion of the Chesapeake and Ohio Canal combined to doom the company. At the beginning of the Civil War, the road was abandoned as a toll road.

One of several stone bridges remaining in Virginia, Broad Run Bridge and Toll House are probably the only such extant combination. In addition to being such a unique survival, they form an extremely picturesque design which gains in interest, especially to contemporary eyes, by their strict functionalism and structural integrity.

SEE INSTRUCTIONS

## 9. MAJOR BIBLIOGRAPHICAL REFERENCES


Files of the Virginia Department of Highways. (Mr. E. W. Turner, Landscape Engineer)

Osborne, Mrs. Frank, "Broad Run Bridge," Virginia Highway Bulletin (March 1949).


## 10. GEOGRAPHICAL DATA

| LATITUDE AND LONGITUDE COORDINATES DEFINING A RECTANGLE LOCATING THE PROPERTY | | | | | | OR | LATITUDE AND LONGITUDE COORDINATES DEFINING THE CENTER POINT OF A PROPERTY OF LESS THAN TEN ACRES | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CORNER | LATITUDE | | | LONGITUDE | | | | LATITUDE | | | LONGITUDE | | |
| | Degrees | Minutes | Seconds | Degrees | Minutes | Seconds | | Degrees | Minutes | Seconds | Degrees | Minutes | Seconds |
| NW | ° | ' | " | ° | ' | " | | 39 ° | 02 ' | 47 " | 77 ° | 26 ' | 00 " |
| NE | ° | ' | " | ° | ' | " | | | | | | | |
| SE | ° | ' | " | ° | ' | " | | | | | | | |
| SW | ° | ' | " | ° | ' | " | | | | | | | |

APPROXIMATE ACREAGE OF NOMINATED PROPERTY: Less than 10 acres.

LIST ALL STATES AND COUNTIES FOR PROPERTIES OVERLAPPING STATE OR COUNTY BOUNDARIES

| STATE: | CODE | COUNTY | CODE |
|---|---|---|---|
| | | | |
| STATE: | CODE | COUNTY: | CODE |
| | | | |
| STATE: | CODE | COUNTY: | CODE |
| | | | |
| STATE: | CODE | COUNTY: | CODE |
| | | | |

## 11. FORM PREPARED BY

NAME AND TITLE:
Staff, Virginia Historic Landmarks Commission, James W. Moody, Jr., Director

| ORGANIZATION | DATE |
|---|---|
| Virginia Historic Landmarks Commission | November 13, 1969 |

STREET AND NUMBER:
Room 1116, Ninth Street State Office Building

| CITY OR TOWN: | STATE | CODE |
|---|---|---|
| Richmond | Virginia | 45 |

## 12. STATE LIAISON OFFICER CERTIFICATION

As the designated State Liaison Officer for the National Historic Preservation Act of 1966 (Public Law 89-665), I hereby nominate this property for inclusion in the National Register and certify that it has been evaluated according to the criteria and procedures set forth by the National Park Service. The recommended level of significance of this nomination is:

National ☐ State ☒ Local ☐

Name Edw. P. Alexander

Dr. Edward P. Alexander, Chairman

Title Virginia Historic Landmarks Commission

Date December 2, 1969

## NATIONAL REGISTER VERIFICATION

I hereby certify that this property is included in the National Register.

*Chief, Office of Archeology and Historic Preservation*

Date

ATTEST:

*Keeper of The National Register*

Date

SEE INSTRUCTIONS

Form 10-301
(Dec. 1968)

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

## NATIONAL REGISTER OF HISTORIC PLACES

## PROPERTY MAP FORM

*(Type all entries - attach to or enclose with map)*

| STATE | |
|---|---|
| Virginia | |
| COUNTY | |
| Loudoun | |
| FOR NPS USE ONLY | |
| ENTRY NUMBER | DATE |
| | |

SEE INSTRUCTIONS

**1. NAME**

COMMON: Broad Run Bridge and Toll House

AND/OR HISTORIC: Broad Run Bridge and Toll House

**2. LOCATION**

STREET AND NUMBER:
At intersection of Rt. 7, Rt. 28, and Broad Run.

CITY OR TOWN:
(Sterling vicinity)

| STATE: | CODE | COUNTY: | CODE |
|---|---|---|---|
| Virginia | 45 | Loudoun | 107 |

**3. MAP REFERENCE**

SOURCE: U.S.G.S. map 7.5', quadrangle Sterling, Va.-Md.

SCALE: 1:24000

DATE: 1952

**4. REQUIREMENTS**

TO BE INCLUDED ON ALL MAPS

1. Property broundaries where required.
2. North arrow.
3. Latitude and longitude reference.

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UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

## NATIONAL REGISTER OF HISTORIC PLACES

## PROPERTY PHOTOGRAPH FORM

*(Type all entries - attach to or enclose with photograph)*

| STATE | |
|---|---|
| Virginia | |
| COUNTY | |
| Loudoun | |
| FOR NPS USE ONLY | |
| ENTRY NUMBER | DATE |
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(Sterling vicinity)

| STATE: | CODE | COUNTY: | CODE |
|---|---|---|---|
| Virginia | 45 | Loudoun | 107 |

**3. PHOTO REFERENCE**

PHOTO CREDIT: Virginia Historic Landmarks Commission

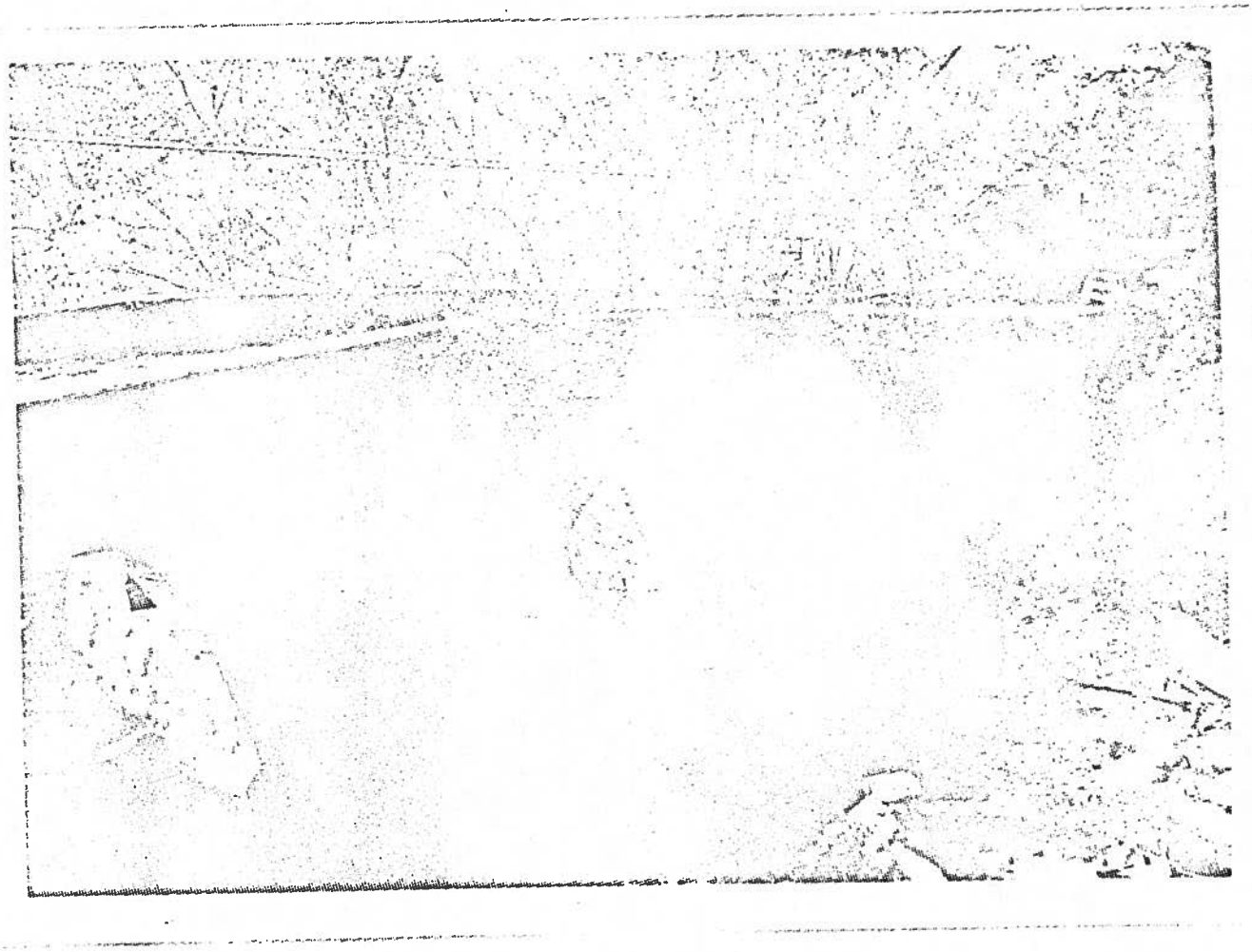
DATE OF PHOTO: 1969

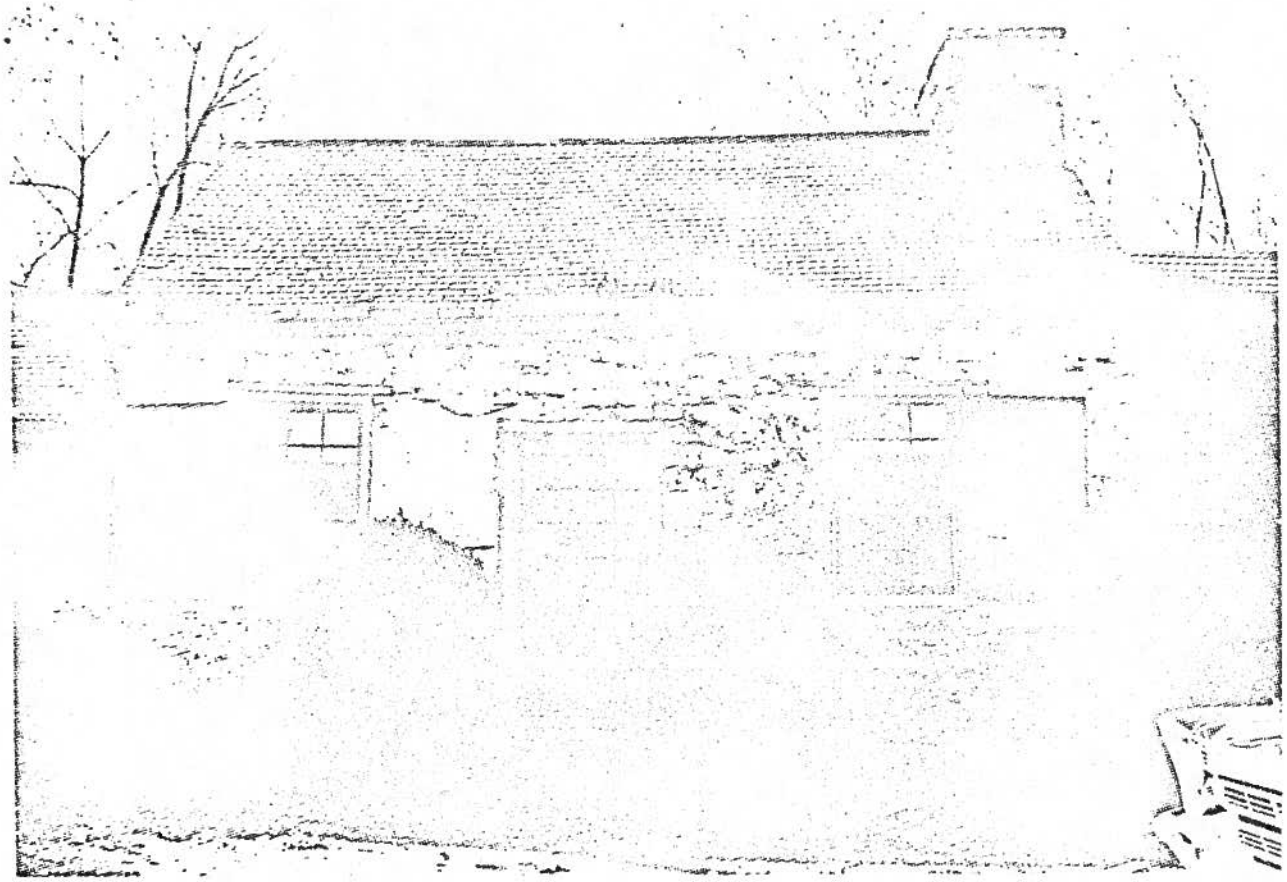
NEGATIVE FILED AT: Virginia Historic Landmarks Commission
Richmond, Virginia

**4. IDENTIFICATION**

DESCRIBE VIEW, DIRECTION, ETC.

View of Broad Run Bridge from the Northeast, with Toll House at far right.





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UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

## NATIONAL REGISTER OF HISTORIC PLACES

## PROPERTY PHOTOGRAPH FORM

*(Type all entries - attach to or enclose with photograph)*

| STATE | |
|---|---|
| Virginia | |
| COUNTY | |
| Loudoun | |
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| ENTRY NUMBER | DATE |
| | |

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| STATE: | CODE | COUNTY: | CODE |
|---|---|---|---|
| Virginia | 45 | Loudoun | 107 |

3. PHOTO REFERENCE

PHOTO CREDIT: Virginia Historic Landmarks Commission

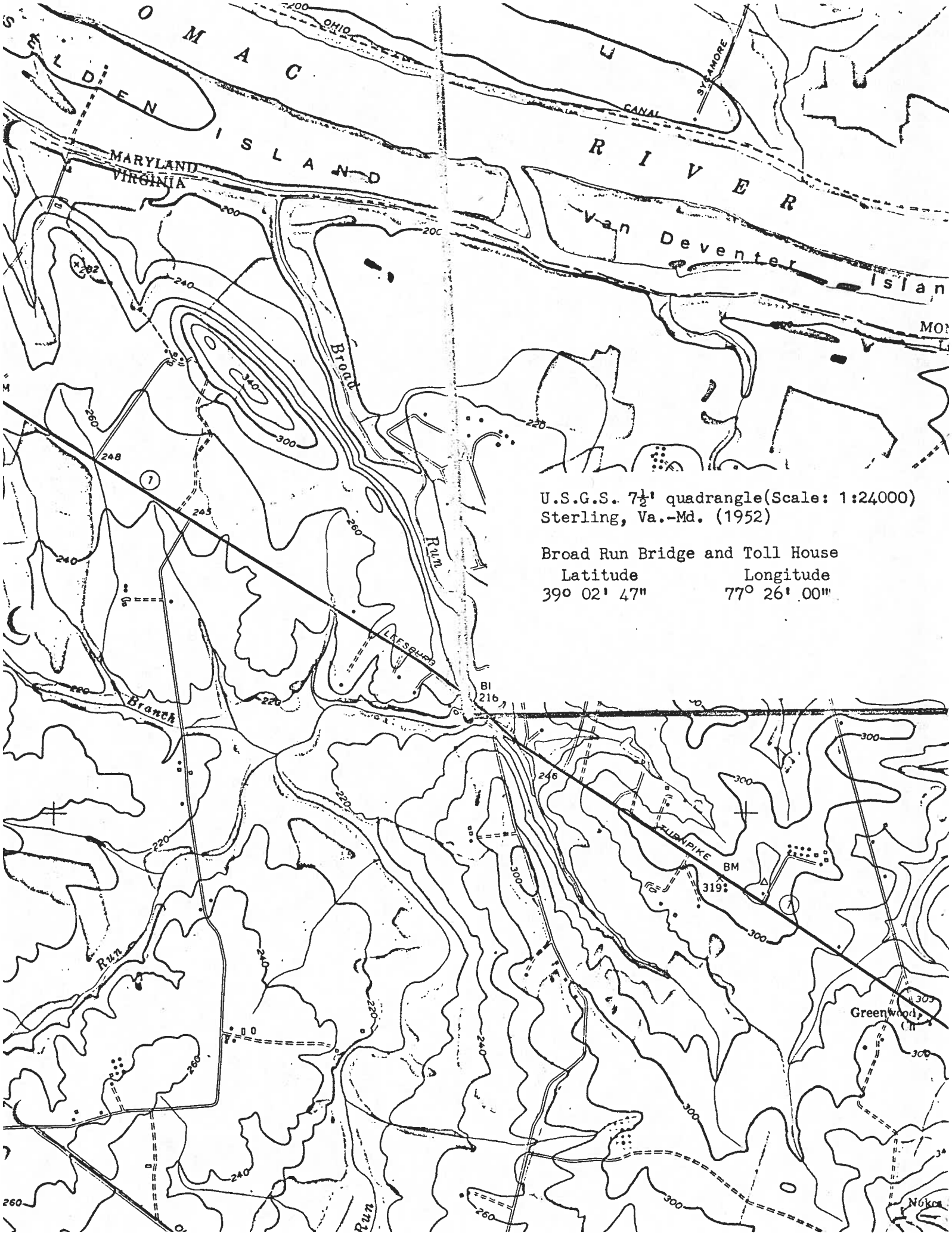
DATE OF PHOTO: 1969

NEGATIVE FILED AT: Virginia Historic Landmarks Commission
Richmond, Virginia

4. IDENTIFICATION

DESCRIBE VIEW, DIRECTION, ETC.

View of Toll House from the North.




U.S.G.S. 7½' quadrangle(Scale: 1:24000)
Sterling, Va.-Md. (1952)

Broad Run Bridge and Toll House

| Latitude | Longitude |
|---|---|
| 39° 02' 47" | 77° 26' 00" |

FORM 10-301 A
(6/72)

UNITED STATES DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

# NATIONAL REGISTER OF HISTORIC PLACES
## PROPERTY PHOTOGRAPH FORM

*(Type all entries - attach to or enclose with photograph)*

1. NAME

| COMMON | AND/OR HISTORIC | NUMERIC CODE *(Assigned by NPS)* |
|---|---|---|
| Broad Run Bridge and Toll House | | |

2. LOCATION

| STATE | COUNTY | TOWN |
|---|---|---|
| Virginia | Loudoun | (Sterling vicinity) |

STREET AND NUMBER

At intersection of Route 7, Route 28, and Broad Run.

3. PHOTO REFERENCE

| PHOTO CREDIT | DATE | NEGATIVE FILED AT |
|---|---|---|
| William Edmund Barrett | Summer 1972 | William Edmund Barrett, Washington, D.C. |

4. IDENTIFICATION

DESCRIBE VIEW, DIRECTION, ETC.

Copy of Summer 1972 View from Northeast.

GPO 932-009

*Goose Creek Meeting House, Lincoln, Virginia*
*Photo courtesy of: Paul Glenshaw*

# Chapter 10

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# Design and Preservation Guidelines:
## Guidelines for the Preservation of Historic Standing Structures

ATT 2

## Principles

The following guidelines outline five strategies for the preservation of historic standing structures. The guidelines are derived predominately from the standards and guidelines of the National Park Service. These strategies are prioritized in the order listed below.

1. **Preservation**

   a. The original use/use type of the structure should be preserved. Structural stabilization,rehabilitation and/or restoration should be executed as necessary to the Secretary of the Interior's Standards for the Treatment of Historic Properties and the Secretary of the Interior's Standards for Rehabilitation (36 CFR 67).

   b. Historic structures should be protected in the context of their natural and/or cultural settings. The County will develop a package of incentives to encourage property owners to limit development within this area.

   c. New developments that extend into the viewshed and/or setting of a historic structure will be reviewed for compatibility with the architecture and associated landscape of the historic structure.

   d. Architectural Compatibility Guidelines: In reviewing new land development applications for compatibility with historic structures, the following factors should be taken into consideration:

      i. Building mass and height in relation to that of surrounding development within its viewshed
      ii. Roof form
      iii. The setback and placement of the building on the lot in relation to the average setback and placement of the nearest adjacent and opposite buildings within the viewshed of the historic resource(s)
      iv. Building orientation
      v. Number, placement and proportion of façade fenestration, including primarily the doors and windows
      vi. Size, shape and proportion of entrance features such as porches
      vii. Choice and color of exterior construction materials
      viii. Architectural detailing
      ix. Landscape elements such as vegetation, fences, walkways, etc.

2. **Adaptive Re-use**

   a. While it may not always be possible to preserve or promote the original use for which a historic structure was constructed, the County recognizes the value of the building itself as a historic resource and calls for its preservation through adaptive re-use.

   b. The proposed re-use should be consistent with and implement the land use policies for the area as defined in the County's Comprehensive Plan.

   c. The historic landscape associated with the structure should be protected to preserve the resource in its context.

   d. The proposed use should generally be compatible with the surrounding landscape and development patterns. For instance, any additional parking, lighting or signage requirements necessitated by the re-use of the historic structure should be appropriately sized and/or shielded

to minimize any adverse impacts on the character of the surrounding area. The County will amend its regulatory documents to ensure that the minimum parking, signage, lighting and other design requirements do not adversely impact the historic character of an area.

**3. Record and Relocate**

a. The proposed use of a relocated structure should be compatible with the land use policies of the receiving site and surrounding uses.

b. The site to which a historic structure is relocated/receiving site should meet the following established criteria:

Moving Historic Standing Structures: Criteria for Receiving Sites

i. Receiving sites should ensure that the historic resource is compatible with its new landscape. (Refer to the section on Architectural Compatibility Guidelines)
ii. Locate the structure where it is similar in architecture and period to the existing buildings.
iii. Locate the building within the same historic district or a historic district with a similar architectural period.
iv. Retain all the important character defining architectural features that contribute to the historic authenticity of the building.
v. Landscape the site with indigenous plantings similar to those at the original site.

**4. Record and Dismantle**

a. Dismantle a building if:

i. The building is structurally unstable
ii. It can be shown that at least 60 percent of the structural integrity of the building has been compromised based on current structural engineering standards
iii. Incompatible additions or modifications over time have depleted the historic value or integrity of the structure.

b. Dedicate or sell building materials salvaged from historic structures to the County, or another public or private agency/organization that is involved in the preservation field.

c. Include with these materials a written history of the structure from which the materials were salvaged.

**5. Record and Demolish**

a. Demolish a building if:

i. The building is structurally unstable.
ii. It can be shown that at least 60 percent of the structural integrity of the building has been compromised based on current structural engineering standards
iii. Incompatible additions or modifications over time have depleted the historic value or integrity of the structure.

## Guidelines for the Delineation of Historic Settings

Historic settings comprise both natural and cultural elements. To assist in the delineation and preservation of these settings, the Preservation Plan calls for the definition of two components of settings: the 'Viewshed' and the 'Resource Setting.'
Viewsheds may be defined simply as the foreground of the resource. The definition of resource settings is more complex. The resource setting of a historic structure includes the historic landscape associated with the structure, including the foreground and background or the backdrop against which the structure is viewed. The viewshed may be considered a component of the resource setting.

**1. Viewshed**

a. The viewshed of a historic structure or complex is generally defined as the foreground of the primary structure(s) to the public right-of-way that serves as the primary access to the site.

b. In the case of a historic district or a landscape such as a battlefield, the viewshed should include the views to and from all public rights-of-way adjacent to the district or landscape.

c. The viewshed should be protected from at least one point on the public right-of-way that serves as the primary access to the site.

d. Some historic properties are located in less visible areas of the County from the perspective of heritage tourism and public access. These sites are typically located away from major travel corridors, nestled in remote corners of the county, etc. In such areas that are typically not frequented by tourists or the general public, the viewsheds may be terminated at the property boundary and not extend to the public right-of-way.

**2. Resource Setting**

a. Protect the historic resource in the context of their historic setting that includes both the natural and cultural landscape elements on the property.

b. The resource setting is the immediate foreground and background of the resource and includes the following elements:

- All contributing structures
- Landscape elements such as tree lines, driveways, historic roadbeds, gardens, walls and fences associated with the structure.

c. The resource setting should be protected from at least one point on the public right-of-way that serves as the primary access to the site. The setting will include all or part of the viewshed as defined above.

d. Include all contributing structures in the definition of the setting. If this is not feasible, focus on the primary structure.

e. Applicants should identify contributing landscape elements, define the boundaries of the resource settings and assess their historic significance within the scope of a Context Analysis Report. The Context Analysis Report should also identify the viewing point(s) and include a definition and analysis of the areas visible from these viewing points on the public right-of- way.

f. Qualified County staff and/or the Heritage Commission will review applications requesting to modify the historic settings. The modified setting and the materials should not detract from the historic authenticity of the resource. Characteristics such as the height, density and species/species composition of vegetation, design, material and layout of landscape elements such as stone walls and/or the architectural compatibility of buildings intended to redefine the natural boundaries of viewsheds should be considered in the review.

**3. Buffer Guidelines**

In developing buffers around historic resources to protect them from incompatible development patterns or to modify the boundaries of a historic setting or viewshed, the following guidelines will be followed.

a. A historic structure or complex should be appropriately buffered from surrounding development when the structure or complex cannot be protected in its natural or cultural setting or the historic landscape cannot be preserved in its entirety.

b. Buffers may serve to define or direct views to and from the resource. They may also be used to define narrower boundaries for the viewshed or resource setting of a historic structure and shield the historic resource from incompatible surrounding developments.

c. Buffers may consist of vegetation or be constructed out of traditional landscape elements such as stone walls.

d. These buffers should be protected through perpetual open space easements.

e. Applications should be reviewed to ensure that the design, layout and choice of materials for the buffer maintain or enhance the historic authenticity of the resource.

## Development Siting Guidelines

Application

Development siting guidelines are intended to mitigate the impacts of new development on the historic and cultural resources and landscapes of Loudoun County. These guidelines will apply to all new developments proposed within the viewshed or resource setting of a historic structure, cultural landscape or historic district. The historic significance of a resource will be determined through the Phase-1 Report. The development siting guidelines will also apply to all new developments proposed within the viewsheds of designated heritage corridor, including Virginia Byways, State Scenic Rivers and mountain ridges.

**1. Site Development**

a. Retain natural site contours

b. Avoid placing structures on ridgelines or hilltops. Structures should follow the natural topography unless sound engineering standards suggest that it is not feasible.

**2. Site Layout**

a. Incorporate existing features such as trees, hedgerows, walls and fences into the design of new building sites in order to blend with the surrounding landscape.

b. Locate new buildings in such a way that the natural contours and vegetation screen them from the historic resource.

c. Orient buildings in a coherent relationship to each other with one or more organizing elements such as a park, civic or community center, stream corridor or access road.

d. Face buildings towards the public right-of-way. Exceptions to this guideline will be considered on a case-by-case basis. This rule may be waived if for instance, buildings face each other across a pedestrian pathway, a green, square, etc.

**3. Building Design**

a. Building form and orientation should enhance and/or direct existing views.

b. Break down the building mass into smaller units, except for uses that are characterized by large buildings such as barns.

c. The design should establish a hierarchy in the building mass, with the smaller masses located closer to the public right-of-way.

d. The design should be visually compatible with adjoining historic properties. This does not necessarily mean that the architectural style of the historic structure should be duplicated.

e. Designs associated with national franchises or chains proposed within the viewshed of historic resources should be subject to review by the Heritage Commission to ensure their consistency with established architectural compatibility standards.

f. Avoid large expanses of blank walls. Modify surface planes through recessions, projections, introduction of fenestration, variations in building materials, color, texture, etc. Exceptions may be allowed in uses that are designed in accordance with traditional architectural principles, such as barns.

**4. Transportation and Parking**

a. Reduce the number of curb cuts by consolidating site access with shared, well-defined entrances.

b. Avoid large expanses of parking lots. Break parking areas into smaller units. Landscape parking areas to minimize the visual and environmental impacts of impervious surfaces.

c. Avoid placing parking areas in front of buildings. Distribute parking spaces to the sides and rear of buildings.

**5. Services**

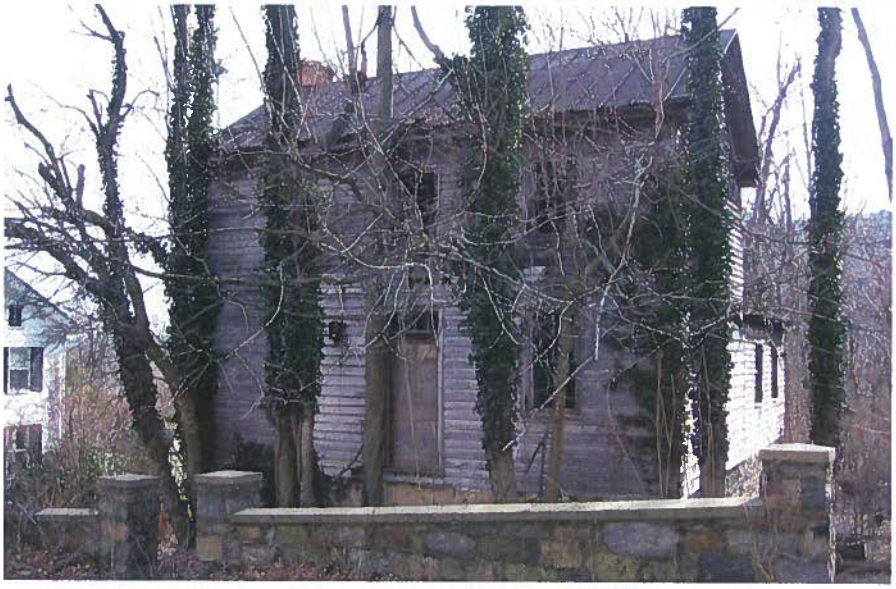
a. Locate storage and service areas away from public view and screen them with plant materials and/or berms, as necessary.

**6. Towns and Villages**

a. When developing within a town, its Joint Land Management Area or a village, the development should be compatible with the predominant development pattern within the town or village.

b. The primary factors that should be considered in determining the compatibility of a proposed development include density, street layout, building siting, mass, form and orientation.

*Late 18th Century House, Cooksville*
*Lost to demolition*



*Left susceptible to invasive vegetation, vermin, and weather, this structure may soon be beyond rehabilitation.*

## A. INTRODUCTION

Historic buildings are irreplaceable community assets. Once they are gone, they are gone forever. With each successive demolition, the integrity of a district is further eroded. The loss of even one building creates a noticeable gap in the historic fabric of the villages and rural areas.

The HDRC is given the responsibility of reviewing Certificates of Appropriateness (CAPP) to raze, demolish, move or relocate any historic landmark, building, or structure in Section 6-307 and the authority to do so in Section 6-1900 of the Zoning Ordinance. The HDRC will consider most applications for Certificates of Appropriateness for partial demolition as exterior alterations rather than demolition.

## B. DEMOLITION

Through the adoption of these guidelines by the Board of Supervisors, the HDRC will use the criteria listed below in evaluating the appropriateness of requests for demolition of historic structures, sites, and objects. An application for demolition will be approved if the preservation of a structure, site, or object is found to be either physically or economically unfeasible under the provisions of the Zoning Ordinance.

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## B. DEMOLITION, continued

### 1. Demolition Criteria

A decision by the Committee approving or denying a CAPP for the demolition of any historic landmark, building, or structure shall be guided by:

a. The historic, scenic, cultural, aesthetic or architectural significance of the building, structure, site, or object.

b. The importance of the historic structure, site, or object to the ambiance of the district.

c. The difficulty or the impossibility of reproducing such a building, structure, site, or object because of its design, texture, material, detail, or unique location.

d. Whether the historic structure, site, or object is one of the last remaining examples of its kind in the district.

e. Whether there are definite plans for reuse of the property if the proposed demolition is carried out, and what the effect of those plans on the character of the surrounding area would be.

f. Whether reasonable measures can be taken to save the historic structure, site, or object from collapse.

g. Whether the historic structure, site, or object is capable of earning reasonable economic return on its value.

h. The condition of the structure and its probable life expectancy.

i. Whether or not the proposed demolition could potentially affect adversely other historic buildings or the character of the historic district.

j. The reason for demolishing the structure and whether or not alternatives exist.

k. Whether or not relocation of the structure would be a practical and preferable alternative to demolition.

l. The public necessity of the proposed demolition.

m. The public purpose or interest in the land or building(s) to be protected.

### GUIDELINES

1. Demolish a historic structure only after all preferable alternatives have been exhausted.

2. Document the building thoroughly through photographs and measured drawings. File this information with the Loudoun County Department of Planning and the Virginia Department of Historic Resources.

3. Maintain any empty lot appropriately so that it is free of hazards and trash and is well tended if the site is to remain vacant for any length of time.

## C. MOVING

The moving of any building from its original site should be avoided if at all possible. Once a building has been moved from its original site, it loses its association with the site, and thus loses its place in time. Each of Loudoun County's Historic and Cultural Conservation Districts is a unique entity, with a variety of building traditions that represent the long history of development in the county.

Moving a building should be considered only after it is determined that, should it remain at its original site, it would meet sure demolition. All other avenues should be explored if the purpose is the preservation of the structure. If there is no other option to save a building from demolition, careful plans should be undertaken to find a suitable site for the structure.

The first choice for relocation should be a vacant site in the same historic district. Such a site will allow the building to continue to contribute to the character of the district and help to ensure compatibility with existing structures. If the building must be moved outside of the historic district, a suitable site should be chosen after consulting *Chapter 4: Guidelines for New Construction*.

Since the relocation of a historic structure is a rare occurrence in a historic district, the following *criteria* may serve as a guide for both the property owner and the HDRC in a discussion of the relocation request.

### 1. Moving Criteria

A decision by the HDRC approving or denying a Certificate of Appropriateness (CAPP) for the relocation of a historic structure, or object, shall be guided by:

a. The historic, scenic, cultural, aesthetic or architectural significance of the building, structure, site, or object.

b. The importance of the historic structure, site, or object to the ambiance of a district.

c. Whether there are definite plans for the property to be vacated and what the effect of those plans on the character of the surrounding area will be.

d. Whether the historic structure or object can be moved without significant damage to its physical integrity.

e. Whether the proposed relocation area is compatible with the scenic, cultural, aesthetic, historical, and architectural character of the building, structure, site, or object.

f. The public necessity of the proposed move.

g. The public purpose or interest in the land or building(s) to be protected.

h. The effect of the vacant lot on the continuity of the district and its character.

i. The condition of the structure and its probable life expectancy.

j. The view of the structure from a public street.

k. Whether relocation is the only practical means of saving the structure from demolition.

### GUIDELINES

1. Move buildings only after all alternatives to retention have been examined, but prior to demolition.
2. Seek guidance from the Department of Planning for information about moving buildings and documenting the building on its original site before undertaking the move.
3. Contact the Virginia Department of Historic Resources for assistance prior to moving the building if there is a desire for it and the district to remain listed on the Virginia Landmarks Register and the National Register of Historic Places.
4. Photograph the building and the site thoroughly and also measure the building if the move will require substantial reconstruction.
5. Assess the building's structural condition in order to minimize any damage that might occur during the move.
6. Select a contractor who has experience in moving buildings and check references with other building owners who have used this contractor.
7. Secure the building from vandalism and potential weather damage before and after its move.
8. Improve the empty lot in a manner consistent with other open space in the historic district if the site is to remain vacant for any length of time.

# 43 Preservation Briefs

Technical Preservation Services
National Park Service
U.S. Department of the Interior

## Preservation Brief 43
## The Preparation and Use of Historic Structure Reports

**Deborah Slaton**

»Introduction
»Guiding the Treatment of Significant Historic Properties
»When to Prepare the Report
»Commissioning the Report
»How Much Will It Cost?
»Report Preparation
»Report Organization
»Report Production and Availability
»Summary

**A NOTE TO OUR USERS:** The web versions of the **Preservation Briefs** differ somewhat from the printed versions. Some illustrations are new, captions are simplified, illustrations are typically in color rather than black and white, and some complex charts have been omitted.

## Introduction

A historic structure report provides documentary, graphic, and physical information about a property's history and existing condition. Broadly recognized as an effective part of preservation planning, a historic structure report also addresses management or owner goals for the use or re-use of the property. It provides a thoughtfully considered argument for selecting the most appropriate approach to treatment, prior to the commencement of work, and outlines a scope of recommended work. The report serves as an important guide for all changes made to a historic property during a project-repair, rehabilitation, or restoration-and can also provide information for maintenance procedures. Finally, it records the findings of research and investigation, as well as the processes of physical work, for future researchers.

**A historical "first."** The first historic structure report prepared in the United States, *The Moore House: The Site of the Surrender-Yorktown*, was written by Charles E. Peterson of the National Park Service in the early 1930s. In the decades since the Moore House report was completed, preservation specialists commissioned by owners and managers of historic properties have prepared thousands of reports of this type. Similar studies have also been used for many years as planning tools in France, Canada, Australia, and other countries, as well as in the United States. Although historic

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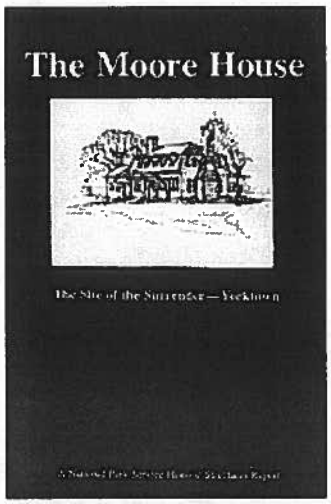
structure reports may differ in format, depending upon the client, the producer of the report, the significance of the structure, treatment requirements, and budgetary and time restrictions, the essential historic preservation goal is the same.

*"Just as an art conservator would not intervene in the life of an artistic artifact before obtaining a thorough knowledge of its history, significance, and composition, so those engaged in the preservation of buildings...should proceed only from a basis of knowledge. Too often in the past, the cultural integrity of countless buildings...has been compromised by approaches to restorations grounded on personal whim, willful romanticism, and expedient notions of repair...The preparation of a historic structure report is the first step in adopting a disciplined approach to the care of a historic building."* (From the introduction to *The University of Virginia, Pavilion 1, Historic Structure Report,* Mesick Cohen Waite Hall Architects, 1988.)




**In the introduction to the first historic structure report in this country, Charles E. Peterson of the National Park Service wrote in 1935, "any architect who undertakes the responsibility of working over a fine old building should feel obligated to prepare a detailed report of his findings for the information of those who will come to study it in future years." Since then, thousands of historic structure reports (HSRs) have been prepared to help guide work on historic properties. Photo: National Parks and Conservation Association.**

In response to the many inquires received on the subject, this Preservation Brief will explain the purpose of historic structure reports, describe their value to the preservation of significant historic properties, outline how reports are commissioned and prepared, and recommend an organizational format. The National Park Service acknowledges the variations that exist in historic structure reports and in how these reports address the specific needs of the properties for which they have been commissioned. Thus, this Brief is written primarily for owners and administrators of historic properties, as well as architects, architectural historians, and other practitioners in the field, who have limited experience with historic structure reports. It also responds to the requests of practitioners and owners to help define the scope of a historic structure report study.

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## Guiding the Treatment of Significant Historic Properties

**Historic structure reports are prepared for many different types of structures with various intended uses. Examples include courthouses and state capitols still serving their historic function, such as the Wisconsin State**

A historic structure report is generally commissioned by a property owner for an individual building and its site that has been designated as historically or architecturally significant, particularly buildings open to the public, such as state capitols, city halls, courthouses, libraries, hotels, theaters, churches, and house museums. It is certainly possible, but is less common, to prepare a historic structure report for a privately owned residence.

Besides the building itself, a historic structure report may address immediate site or

**Capitol (above); significant properties that are to be rehabilitated and adaptively reused; and properties that are to be preserved or restored as house museums. Photo: Wiss Janney Elstner Associates, Inc.**

landscape features, as well as items that are attached to the building, such as murals, bas reliefs, decorative metalwork, wood paneling, and attached floor coverings. Non-attached items, including furniture or artwork, may be discussed in the historic structure report, but usually receive in-depth coverage in a separate report or inventory. One significant property may include multiple buildings, for example, a house, barn, and outbuildings; thus, a single historic structure report may be prepared for several related buildings and their site.

**The scope of such studies includes the interior as well as exterior of the historic structure. This is the interior of the Stanley Field Hall, Field Museum, Chicago. Photo: McGuire Igleski & Associates, Inc.**

**The University of Vermont has more than thirty contributing buildings in four historic districts listed in the National Register of Historic Places. The Campus Master Plan recognizes a commitment to respect and maintain the historic integrity of these facilities. Historic structure reports are available for many of the University's historic structures. Photo: University of Vermont Historic Preservation Program.**

Historic structure reports can be prepared for other historic resource types as well, including bridges, canals, ships, mines, and locomotives, which are categorized as structures by the National Register of Historic Places; sculpture and monuments, which are categorized as objects; and college campuses and industrial complexes, which are categorized as districts. For battlefields, gardens, designed landscapes, and cemeteries, which are categorized as sites, parallel evaluation and investigation is usually undertaken through a separate document called a cultural landscape report.

**A team approach.** With such an array of subject matter, it is not surprising that preparation of a historic structure report is almost always a multidisciplinary task. For a small or simple project, the project team may include only one or two specialists. For a complex project, a team may involve historians, architectural historians, archeologists, architects, structural engineers, mechanical engineers, electrical engineers, landscape architects, conservators, curators, materials scientists, building code consultants, photographers, and other specialists.

The disciplines involved in a specific historic structure report reflect the key areas or issues to be addressed for the particular property. The project leader or designated principal author for the report is responsible for coordinating and integrating the information generated by the various disciplines. Designation of a principal author may depend on the goals of the historic structure report and on which disciplines are emphasized in the study.

**For small or simple projects, the project team may include only one or two specialists while complex projects may involve a large number of investigators and specialists. Evaluation of this barn may primarily involve an historian, an architectural**

**Value of the Historic Structure Report**

conservator, and a structural engineer. Photo: Wiss Janney Elstner Associates, Inc.

The completed historic structure report is of value in many ways. It provides:

- A primary planning document for decision-making about preservation, rehabilitation, restoration, or reconstruction treatments
- Documentation to help establish significant dates or periods of construction
- A guide for budget and schedule planning for work on the historic structure
- A basis for design of recommended work
- A compilation of key information on the history, significance, and existing condition of the historic structure
- A summary of information known and conditions observed at the time of the survey
- A readily accessible reference document for owners, managers, staff, committees, and professionals working on or using the historic structure
- A tool for use in interpretation of the structure based on historical and physical evidence
- A bibliography of archival documentation relevant to the structure
- A resource for further research and investigation
- A record of completed work

**Benefits for large-scale and long-term projects.** In the development of any historic structure report, the scope of work and level of detail are necessarily adjusted to meet the requirements of a particular project, taking into account the property's significance, condition, intended use, and available funding. This does not mean that every significant historic property requires-or receives-a comprehensive investigation and detailed report. Some historic structure reports are of very limited scope. It may be necessary for a project to proceed without a historic structure report, either because of the cost of the report or a perceived need to expedite the work.

Most large-scale or long-term work projects would benefit greatly from the preparation of such a report-and not only from the value of the report as an efficient planning tool (See box above). If work proceeds without a historic structure report to guide it, it is possible that physical evidence important to understanding the history and construction of the structure may be destroyed or that inappropriate changes may be made. The preparation of a report prior to initiation of work preserves such information for future researchers. Even more importantly, prior preparation of a report helps ensure that the history, significance, and condition of the property are thoroughly understood and taken into consideration in the selection of a treatment approach and development of work recommendations. One of the goals of a historic structure report is to reduce the loss of historic fabric or significance and to ensure the preservation of the historic character of the resource.

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## When to Prepare the Report

**Optimal first phase.** The historic structure report is an optimal first phase of historic preservation efforts for a significant building or structure, preceding design and implementation of preservation, rehabilitation, restoration, or reconstruction work.

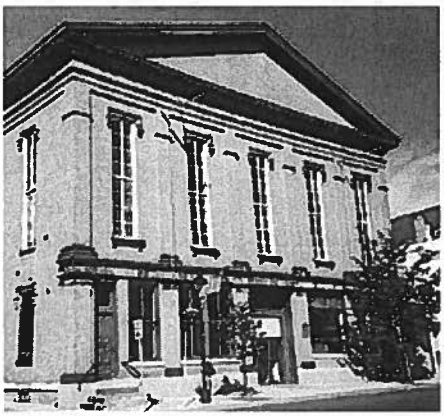
Information contained in the report documents existing conditions and serves as a basis for proposing physical changes. As additional information is learned relevant to the history of the building, and as work on the historic structure is implemented, the report can be amended and supplemented.

**Scope of Work**

The following questions should be answered to determine the scope of work required for the study:

- Is the building's history well understood?
- Has the period of significance been established?
- Does the building represent a variety of periods of construction, additions, and modifications, not all of which may be significant?
- What archival documentation is available?
- Does the building have physical problems that require repair? What construction materials and systems are known to exhibit distress or deterioration?
- Does the building have code or functional problems that interfere with its use?
- Is the building in use? Is a new or more intensive use planned?
- Is funding available to commission the report needed to address these requirements? If not, can the scope of the report be reduced to answer critical questions in a limited report?
- Has the time frame for the overall project been established?

The length of time required to prepare a historic structure report and the budget established for its development will vary, depending on the complexity of the project, the extent and availability of archival documentation, and to what extent work has already been performed on the building. If the scope of a historic structure report for a simple building is limited to a brief overview of historic significance, a walk-through condition assessment, and general treatment, the study and report may be completed within a few months' time by an experienced investigator. On the other hand, a historic structure report for a larger building with numerous past alterations and substantive problems will require extensive research and on-site study by a multidisciplinary team. This type of report can often take up to two years to complete.



**At the Hudson Opera House, a multi-arts center in Hudson, New York, the historic structure report was prepared incrementally. The first phase of the report focused on assessment and recommendations for**

**Incremental preparation.** If budgetary constraints preclude completing the historic structure report as one project, it can be prepared incrementally. The work recommendations should not be developed or implemented prior to completion of research and investigation, except for emergency stabilization to prevent immediate failure or damage, or temporary measures to address critical health and safety issues. A partial historic structure report can be completed in preparation for anticipated work that must be initiated to preserve or protect the building. This type of report includes analysis of only those building elements and systems that may be affected by the proposed work, and involves only the specialists needed to address the types of investigation and work planned. For example, research and documentation of existing interior finishes may be required before undertaking localized

**repair of the roofing, the most critical issue in preservation of the building. Photo: Gary Schiro.**

structural stabilization that will require removal of interior materials.

In undertaking such work prior to the completion of a historic structure report, caution should be taken not to alter or unnecessarily remove changes to the building that had occurred over time. The completed report may conclude that such changes to the building may have acquired significance in their own right and therefore merit preservation.

**Documenting past work.** Sometimes a historic structure report is initiated when repair or restoration work on the historic building has already been completed. Although it is always recommended that the study be done prior to new work, in this case, the report needs to document--as fully as possible-the condition and appearance of materials, elements, and spaces as they existed prior to the work performed. The extent to which this can be achieved depends on the quality of archival documentation available and physical recording undertaken prior to the completed work. The report should describe the nature and extent of the past repair or restoration work, and, if possible, should also document research performed, reasons for design decisions made, and the construction process for the work already completed on the structures.

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## Commissioning the Report

Commissioning a historic structure report requires answering a series of questions to establish the scope of work. The goals of the report need to be defined and the report should be designed to support planning for the future of the historic structure. This effort may involve gathering information to answer questions about what is significant about the building and site; what uses are appropriate for the building, or whether existing uses need to be modified; what known conditions require repair and whether those repairs are urgent; and what short-term and long-term goals need to be addressed. Finally the available budget for the historic structure report project should be established before a request for proposals is issued.

The procedures for preparing a historic structure report and the outline of report content and organization can serve as the basis to develop a scope of work for the study and also to solicit proposals for a report that reflects the requirements of the specific structure, and, of course, the available budget. Although the request for proposals should always establish such a scope of work, firms may be invited to suggest adjustments to the scope of work based on their past experience. The request for proposals should include a qualifications submittal from each proposer. This submittal should include resumes for the principal investigators and a description of experience in preparing historic structure reports or similar studies, as well as experience with buildings of similar type, age, and construction to the subject of the study. References and sample of work may be requested from the proposer as part of this submittal. An interview with one or more candidates is highly recommended, both so that the proposers can present their project approach and qualifications, and so that the client can ask questions in response to the submitted proposal.

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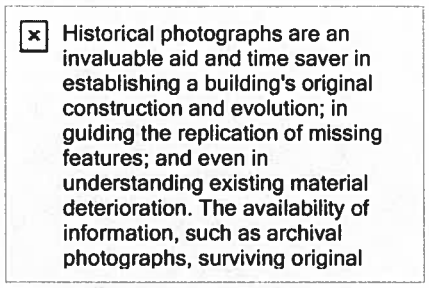
## How Much Will It Cost?

The cost of undertaking a historic structure report is determined by numerous factors, some of which may be unique to a particular property. Common to most projects, however, are seven factors that help determine the cost of a report:

1. The level of significance of the property will certainly influence the cost. That is, a property that is nationally significant would likely require a greater effort than a property that is only locally significant.

2. The treatment and use for which the historic structure report information provides a basis is an important cost consideration. If the decision is reached to maintain a building in its current form, the level of effort required in preparing a historic structure report would be less than where the intended treatment is a comprehensive restoration. A change in building use likewise may increase the level of effort; for example, the additional work involved in addressing different building code provisions.




**Historical photographs are an invaluable aid and time saver in establishing a building's original construction and evolution; in guiding the replication of missing features; and even in understanding existing material deterioration. The availability of information, such as archival photographs, surviving original architectural drawings, or HABS documentation, has a direct bearing on the cost of preparing a historic structure report. In this circa 1890 photo of the Rancho San Andrés Castro Adobe, the "lumbering up" on the south end is a character-defining feature of adobe construction that is rarely seen today. Photo: Historic photograph from the Historic Structure Report for Rancho San Andrés Adobe by Edna Kimbro, State Historian, California State Parks, Monterey District.**

3. The availability of information about the historic resource has a direct bearing on costs. Some historic structures are well researched, and drawings may have been prepared to exacting standards, while others may require considerable original research and investigation to establish the evolution of the structure. On occasion, a property owner's in-house staff or volunteers may undertake research in advance of a contracted study as a way to reduce the cost of the report.

4. The location of and access to a historic building is a cost factor for some studies. A property in a remote mountain location can involve high travel costs relative to properties in or near an urban area. A structure requiring special techniques for exterior physical inspection would involve higher access costs than a small residential structure.

**Collecting Information for the Report**

**A typical study involves:**

- Preliminary walk through
- Research and review of archival documentation
- Oral histories
- An existing condition survey (including exterior and interior architectural elements, structural systems, mechanical and electrical systems, etc.)
- Measured drawings following the *Secretary of the Interior's Standards and Guidelines for Architectural and Engineering Documentation*
- Record photography
- Evaluation of significance
- Discussion with the owner and users about current and future intended uses for the structure

- Selection and rationale for the most appropriate approach to treatment (preservation, rehabilitation, restoration, or reconstruction)
- Development of specific work recommendations

5. The size and architectural character of a property affects the time required to prepare a historic structure report. A simple four-room vernacular structure would usually involve less effort than a complicated high-style courthouse with many significant spaces.

**Numerous factors influence the cost of preparing a historic structure report including the level of significance, size, and complexity of the property; required treatment and use; existing condition; and the location and access to the structure. Historic structure reports were prepared for several small lighthouses along the Oregon coast, including the Coquille River Lighthouse, shown here. Photo: Wiss, Janney Elstner Associates, Inc.**

6. The physical condition of the structure and also the extent of physical fabric that is accessible for study will be cost determinants as well. Obviously, a property in good condition is usually less problematic than one in a deteriorated state. For a structure that was continuously occupied and where alterations cover earlier fabric, the opportunity to extract information from physical fabric dating to early periods may be limited without extensive removals that are usually beyond the scope of the historic structure report study. Even where buildings are vacant, there are instances where certain physical investigations may need to be limited because of the destructive impact that will occur to historic fabric.

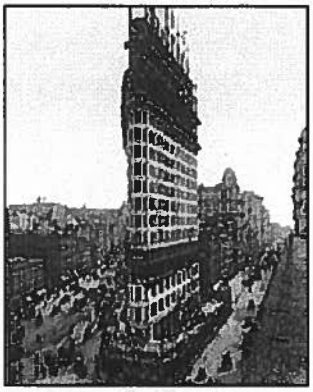
7. The type of final report that is required can significantly affect the cost of the project, but is an area where costs can readily be controlled. Historic structure reports do not necessarily need to be professionally bound and printed. In-house desktop publishing has become commonplace, and a formal work product can often be obtained without excessive costs. Overly sophisticated printing and binding efforts represent a misplaced funding allocation for most historic properties. There are distinct advantages to having a report prepared in an appropriate electronic form, thus reducing the number of hard copies and facilitating future updates and additions to the report. For most properties where historic structure reports are prepared, ten or so hard copies should suffice. Providing one copy of the report in a three-ring binder is a helpful and inexpensive way to furnish the owner with a "working" copy of the document.

***Suggested steps for collecting information prior to configuring the data into the actual report are as follows:***

**Preliminary walk through.** A preliminary walk through of the building and its site with the owner or site manager, appropriate building staff representatives, and key members of the historic structure report team is important to review the project scope of work. During the walk through, a brief review of existing conditions can be performed to highlight user concerns and gather information about distress and deterioration observed. Building staff may also be able to provide information on recent repairs, current maintenance procedures, and specific areas of active deterioration. A brief review of existing documentation available on site is also useful. Site personnel may be able to recommend additional archival resources.

**Historical research.** Archival research should be directed toward gathering information on the building's history, original

construction and later modifications, occupancies, and uses over time. Research for the report is not intended to produce a large compendium of historical and genealogical material, but rather selected information necessary to understand the evolution of the structure, its significance, and justification for the treatment selected. For significant sites where other types of studies such as archeological investigations or a cultural landscape report have been completed or are underway, coordination is required to ensure that research information is shared and that the research effort is not duplicated.



**Historical research is directed toward gathering information on a structure's history, original construction and later modifications, occupancies, and uses over time. Research may range from national repositories such as the Library of Congress to local collections or private family records. Old newspapers, architectural journals and even manufacturing trade catalogs can be surprising sources of historical accounts and illustrations. This circa 1902 photograph of New York's Flatiron Building is of the construction in progress; such photographs are useful in understanding building chronology as well as concealed conditions of as-built construction such as building framing. Photo: Library of Congress, LC-D401-14278.**

If a National Register nomination or other inventory has already been completed for the building and its site, the bibliography of that document may suggest possible sources for further research. In addition, a completed National Register nomination can serve as a starting point for development of the historic structure report sections on history and significance, and can be included in the appendix of the report.

Public and university libraries, and state and local historical societies are likely sources of relevant materials. Municipal records collections often contain deed and building permit information that is useful in developing a chronology of ownership and construction. Architectural, engineering, and construction documents, shop drawings, repair documents, and maintenance records are valuable sources of information. The original drawings and specifications, if extant, may be kept at the archives of the historic building but may also have been retained by the firm that designed the building or successor firms. Building records and other archival documentation may have remained with the structure or site, with previous owners, or with related properties.

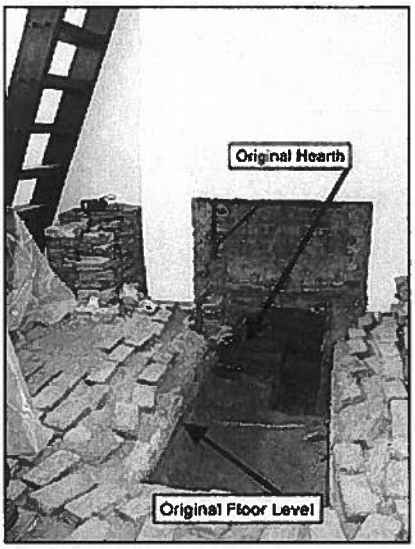
Historic photographs are invaluable in developing a chronology of building changes and in determining the character and detailing of missing elements. Photographs in private collections, not intended as formal documentation, can often be useful. For example, family photographs taken outdoors can document a building that appears in the background. Renderings and paintings can also be useful, but these images must be carefully analyzed and compared with other information to ensure accurate interpretation. Correspondence and oral histories can be important additions to the overall information, but may be unreliable and should be confirmed, when possible, by comparison with photographic documentation and physical evidence.

Fire insurance maps, such as Sanborn maps, can provide information on type of construction materials. When maps from different years are available, these can be useful in developing a chronology of additions and other changes to the structure.

**Existing condition survey.** A survey is performed to document physical spaces and elements, and to assess the current condition of building materials and systems. In conjunction with historical research, the condition survey helps determine the historic integrity of a structure. The survey and inspection should address the building's exterior and interior materials, features and

finishes; structural systems; interior spaces; mechanical, electrical, and plumbing systems; and fire detection and security systems. Further study may be required such as non-intrusive or intrusive investigation, field testing, sample removal, and laboratory testing and analysis of materials.

Archeological investigations can provide information on the locations of building foundations and other sub-grade building elements, and can assist in developing information on the function of adjacent site areas, building elements, and previously unfinished floor spaces. The survey may also address the immediate site landscape, if this is not covered in a separate cultural landscape report.



**Archeological studies may be valuable in uncovering important evidence of changes to a historic structure. Following historical research and after several archeological soil probes, a decision was made to excavate an area in front of a mid-nineteenth century fireplace, revealing the original dirt floor and hearth undetected by earlier restoration efforts. Photo: NPS files.**

Information gathered during the survey can be documented with field notes on baseline drawings consisting of field sketches or measured drawings. In addition, documentation can include photographs (35-mm, large format, digital, perspective-corrected, and scale-rectified photographs; photogrammetry; and laser techniques), sketches and measured drawings, computer-aided design and drafting (CADD), video records, and written notes and field measurements. Depending upon project requirements, documentation may need to be prepared to archival standards regarding paper, photographs and negatives, electronic records, and backup data.

**Measured drawings and record photography.** The collection of the Historic American Building Survey/Historic American Engineering Record (HABS/HAER) archive at the Library of Congress should be searched in case the property has been previously documented through drawings and photographs. While many historic properties have been documented since the start of this invaluable collection in the 1930s, it is still more likely that this type of documentation does not exist for a property for which a historic structure report is being undertaken. Preparation of such documentation to portray the current condition of a property can be an invaluable addition to the historic structure report. Besides serving as a documentary record of a structure, the recording documents can serve another purpose such as an easement document, information for catastrophic loss protection, interpretive drawings, or baseline drawings for proposed work. If undertaken as part of the current building study, the measured drawings and record photography should follow the *Secretary of the Interior's Standards and Guidelines for Architectural and Engineering Documentation*.

**Materials Investigation and Testing.** Field examination and testing of building material may include non-destructive (non-intrusive) or, where necessary, destructive (intrusive) examination and/or testing of materials, components, and systems. Examples of non-destructive methods of field examination and testing include field microscopy, the use of a metal detector to locate concealed metal elements, and X-ray techniques to assess concealed conditions. Some examples of

**The use of special access methods may be necessary for close-up investigation of building elements. At the Wisconsin State Capitol, project architects and engineers used rappelling techniques. Photo: Wiss, Janney, Elstner Associates, Inc.**

destructive methods of field examination and testing include structural testing, strain relief testing, and inspection openings (probes).

Instruments such as a borescope, through which concealed conditions can be viewed through a small hole, permit enhanced examination while limiting damage to the existing building fabric.

Depending upon existing conditions and the results of the site inspection, field monitoring may be required. Field monitoring can include humidity and temperature monitoring, documentation of structural movement and vibrations, light level monitoring, and other environmental monitoring.

In addition, materials samples may be removed for laboratory studies. A wide range of laboratory testing may be appropriate to establish the composition of various construction materials, determine causes of deterioration, and identify and assess appropriate conservation and repair measures. Materials analysis may also be helpful in dating changes to the structure and in developing a chronology of construction. For example, mortar analysis may be performed to determine the composition of original and repointing mortars and to provide information for use in designing a mortar mix for repointing. As another example, paint and other coatings may be analyzed to determine finish types and composition, and original and subsequent color schemes, using special analysis techniques and comparison with color standard systems. Samples should generally be returned to the owner and retained in case future testing is required. In some cases, it may be appropriate to reinstall the samples after materials studies have been completed.

**Paint studies may not only help establish the chronology of paints and paint colors used on a building but also may aid in the dating of existing architectural features. Examination of the paint layers on these modillions utilizing a hand-held microscope enabled an investigating team to confirm in the field which modillions were original and which were later replacements. Photo: NPS files.**

Sample removal and analysis may also be required to identify hazardous materials, which are present in many historic buildings. For example, lead and other heavy metals are components of many older paints and coatings, and asbestos is a constituent of some roofing materials, claddings, sealants, and insulation. Mold and mildew may be present and require special treatment; in this case a consulting industrial hygienist may need to be included in the project team. Analysis may be performed to confirm the materials present, determine the nature of the hazard, and help identify methods of remediation or management.

As buildings constructed during recent decades become "historic," newer materials require study and analysis as part of historic structure reports. For example, curtain wall components and joint sealants may require analysis to determine their composition, identify causes of deterioration, and select appropriate replacement sealants. Composite materials and plastics, present in post-World War II buildings, may also require special effort to determine repair techniques or appropriate materials for replacement.

All of the information gathered during the physical investigation, and through field testing and laboratory analysis, should be documented in field notes, sketches, photographs, and test reports. This information is incorporated in the historic structure report and provides a basis for the development of treatment recommendations.

**Evaluation of significance.** The process of evaluation occurs throughout the study of the historic structure as information is gathered, compared, and reviewed. Historical data and physical evidence are reviewed to help evaluate the historical, architectural, engineering, and cultural significance of the property, its construction and use, and occupants or other persons associated with its history and development. This evaluation includes determination of the period(s) of primary significance. An overview of the building's history and an assessment of its significance are included in the report.

**The Secretary of the Interior provides four distinct but interrelated approaches to the treatment of historic properties:**

- **Preservation** focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time.
- **Rehabilitation** acknowledges the need to alter or add to a historic property to meet continuing or changing uses while retaining the property's historic character.
- **Restoration** is undertaken to depict a property at a particular period of time in its history, while removing evidence of other periods.
- **Reconstruction** re-creates vanished or non-surviving portions of a property for interpretive purposes.

Depending on the historical significance of the property, and whether a detailed history has already been written, a brief or more detailed history may be appropriate. A chronology of construction and changes to the building, developed through historic and physical research, is an effective approach to identifying original building elements, as well as modifications that have occurred over time. If a comprehensive National Register nomination or other inventory has been prepared, the significance may already be defined. In other cases, the significance of a building and even its treatment may have been established through authorizing legislation or through the charter of an organization or foundation that owns the historic property. Where appropriate, however, the building's significance should be re-evaluated in light of research performed for the historic structure report.

The results of the research, investigation, and field and laboratory testing are reviewed as a basis for developing specific work recommendations. The history and significance of the building and its site are evaluated to understand what spaces, elements, and finishes are of architectural or historical importance, and to confirm the overall project goals and treatment direction. The physical condition of the building and its systems is evaluated with regard to existing deterioration and distress, and needed repairs, as well as changes required to meet treatment goals. Attention is given to identification of life safety issues and code considerations. Conditions are also identified that could lead to future safety risks, loss of historic fabric, or loss of performance.

**Selection of a treatment approach.** Once the building's history, significance, and physical condition have been researched and investigated, an appropriate treatment is usually selected. Depending upon the intended use of a

property, funding prospects, and the findings of the investigation, it may be necessary in some cases to identify and discuss an alternate treatment as well. For example, a building currently occupied by caretakers that is a candidate for restoration and use as a museum may require such ambitious funding support that, for the foreseeable future, a more practical treatment could be to preserve the building and retain the caretakers. In this case, the treatment recommendation would be to restore the property and project work relevant to the restoration would be described. However, the alternate treatment (in this instance an interim one) of preserving the building in its current form would also be described, including discussion of work appropriate to preservation such as repairing the existing roof and installing a monitored fire detection system.

**The treatment approach selected for a building usually is determined by the intended use of a property, funding prospects, and the findings of an investigation. The Wolf Creek Inn, operated by the Oregon Parks and Recreation Department, is among the most intact and oldest active traveler's inns in Oregon. The historic structure report outlined a rehabilitation treatment which included such work recommendations as repairs to specific historic fabric, landscape restoration and site improvements, and upgrading of the building's mechanical and electrical systems. Photo: Historic American Building Survey, 1934.**

In selecting an appropriate treatment, *The Secretary of the Interior's Standards for the Treatment of Historic Properties* can be particularly helpful. In use for more than twenty-five years, the Standards are a widely accepted means of planning for and undertaking project work in a manner that preserves historic materials and elements. The Secretary's Standards have been adopted by many state and local review entities for review of work proposals on historic structures.

The Standards and their accompanying Guidelines describe four different options for treatment and list recommended techniques for exterior and interior work consistent with each option. One treatment (preservation, rehabilitation, restoration, or reconstruction) is usually selected and followed throughout the course of a project involving a particular building. Application of a single treatment approach helps to avoid inappropriate combinations of work, such as restoring a building's appearance to an earlier time in history while simultaneously constructing a new addition.

**Development of work recommendations.** The work recommendations are a central feature of the report. They are developed only after the research and investigation has been completed and the overall project goal established as to whether a particular building should be preserved, rehabilitated, restored, or reconstructed. The specific work recommendations need to be consistent with the selected treatment. If analysis performed during the study suggests that the approach or use initially proposed would adversely affect the materials, character, and significance of the historic building, then an alternate approach with a different scope of work or different use may need to be developed. The process of developing work recommendations also needs to take into account applicable laws, regulations, codes, and functional requirements with specific attention to life safety, fire protection, energy conservation, abatement of hazardous materials, and accessibility for persons with disabilities.

In addition to project goals, the proposed work is also guided by the building's condition. The scope of recommended work may range from minor repairs to structural stabilization to extensive restoration. In addition, the scope of work may be very narrow (e.g., priming and painting of woodwork and repair of deteriorated roof flashings), or very extensive (e.g., stabilization of timber framing or major repair and repointing of

exterior masonry walls). The result of implementing (or not implementing) the recommended work needs to be considered as the recommendations are developed.

**The historic structure report for the Hotel Florence, shown here in 1886, provided a basis for stabilization and repair work which has been completed. Initial phases of work addressed preservation of the building envelope, structural repairs, and limited mechanical and electrical improvements. The report also provided recommendations for future rehabilitation work that will be implemented in phases as funding becomes available. Photo: Historic American Buildings Survey.**

Of course, the available project budget is also a factor in determining the extent of recommended work and whether it must be accomplished in several phases or projects. Whether or not available budget is the primary factor in determining the extent of work that can be performed, it is often useful to prioritize recommended work items. The recommended tasks can be examined in terms of relative importance and the time required for implementation. Prioritizing repairs can be critical where immediate or short-term work is needed to stabilize a building or structure, eliminate safety hazards, make the building weather tight, and protect it against further deterioration.

Appropriate procedures for undertaking the recommended work items are described in the historic structure report and are intended to serve as a basis for planning the repair, rehabilitation, or restoration design. The level of detail to which the work items are defined should be limited in the historic structure report, as these recommendations serve as the foundation for, rather than in place of, design and construction documents for the work. For example, baseline drawings annotated with existing condition notes can later serve as a starting place for development of construction drawings. Outline procedures provided in the report for recommended work items can be used later to develop specifications for the work. Finally, a general opinion of probable costs associated with the recommended work is often prepared. A cost estimate is useful to building owners and managers in budget planning and also assists in prioritizing the work. For large or complex projects, the services of a professional cost estimator may be helpful in this effort.

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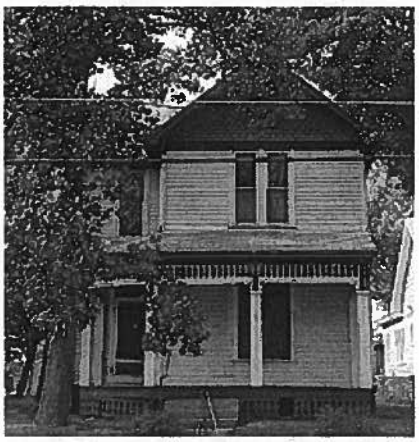
## Report Preparation



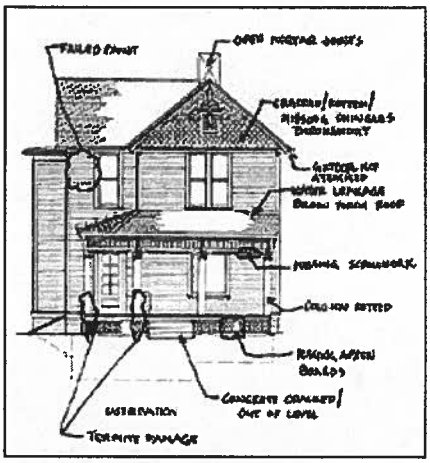
**The historic structure report for the**

Upon completion of the research, physical investigation, evaluation, and work recommendations, the historic structure report is compiled. The principal investigator may submit an outline of the report for owner review at the beginning of the report preparation. A draft report may also be submitted for review when the report is partially complete, especially if there are many new research findings, significant physical distress conditions to be addressed, or complicated choices to be made in determining the treatment.

The report should be prepared in a style and format that is readily

**Noland House in Independence, Missouri, a vernacular house that is significant as part of the context of Harry S. Truman's life and family in Independence, Missouri, includes photographs and measured drawings to record existing features and conditions of the building. The measured drawings will also provide a basis for construction documents for future preservation work. This photograph illustrates the front elevation of the house. Photo: Bahr, Vermeer & Haecker, Architects Ltd.**

accessible and user-friendly; however, it is not essential that a standardized method or format be followed for all historic structure reports. The report can be primarily narrative or graphic, but is most typically a combination of these formats. Ease and economy of report preparation should be considered but should not take precedence over clarity and thoroughness of documentation.



**This is one of the measured drawings for the Noland House (see above, left). Drawing: Bahr, Vermeer & Haecker, Architects Ltd.**

**Meetings and presentations.** In addition to meetings with site personnel early in the study process, it is helpful for the project team to meet at key points during the research, investigation, and development of the historic structure report. For example, it is useful for the project team members performing archival research to meet with site personnel to review documents and findings, and to help ensure that important archival sources have not been overlooked. Project team members may also walk through the building with site personnel during the investigation phase to review and discuss existing conditions and possible recommendation approaches. When the report is in draft form, a meeting of the project team with those personnel who will be reviewing and using the report is useful to discuss overall goals, treatments, and recommendations as these are being developed. Finally, when the study is complete, a presentation of the completed study by the project team helps to familiarize the owner and building personnel with the report, highlight key issues, answer questions, and provide a transition to the use of the report as a working document by the building's caretakers.

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## Report Organization

The scope of the study-historical research, condition survey, investigation and testing, evaluation, selection of appropriate treatment, and development of specific work recommendations-generates a wealth of information about the history and condition of the building and the specific work needed to, preserve, rehabilitate, restore, or reconstruct it. This information is typically a combination of historical and technical data obtained by different members of the project team and presented as an integrated report in text, photographs, drawings, and tables. The project leader or principal author must guide the development of the report so that key issues are addressed, information is documented and assimilated in the report findings and discussion, recommendations are clearly presented, and no information is lost or misinterpreted in the compilation process.

In order to integrate the many pieces of information into a coherent and comprehensive whole, the historic structure report is generally organized into two principal sections preceded by a brief introduction that summarizes overall findings and recommendations and provides project administrative data. The main sections of the report consist of (1) a narrative that documents the evolution of the building, its physical description, existing condition, and an evaluation of significance; and (2) a discussion of historic preservation

objectives, together with recommendations for an overall treatment approach and for specific work. The report is usually supplemented with footnotes or endnotes, bibliography, and appendices of historical documentation and technical data.

It is highly recommended that a post project record of all work performed later be added as a supplement to the historic structure report. This record may consist of annotated drawings, photographs, and other documentation of the work performed. Site personnel may help coordinate this supplement or record if the principal author of the report is not involved in the later construction phase. Some organizations and government agencies consider the post project record to be a third part of a historic structure report and not just a supplement.

When physical evidence is discovered during the course of the construction work or when new documentary evidence is discovered as research continues after completion of the report, this also should be recorded and incorporated into the historic structure report or in an appendix to the report. An important goal of the historic structure report process is to maintain the report as an active and working document, both to facilitate the use of information compiled in the report and to permit the report to readily accommodate new information as it becomes available.

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## Report Production and Availability

The historic structure report is most often prepared in the form of a printed, illustrated manuscript. In recent years, attention has been given to creating or transforming the historic structure report into an electronic document as well. In electronic format, the report can easily be shared with interested parties and is readily updated.

However, because historic structure reports are still mostly produced in printed format (although sometimes concurrently with an electronic document), it is important that, after production, one or more copies be provided to the property owner and also made available to the project team. As the basis for design and construction documents, the historic structure report needs to be readily available and extensively used during implementation of the work.

At least one site copy should be maintained in a physical format that can be readily updated, such as a three-ring notebook to which additional documentation can easily be added. Field documentation materials, including photographs and negatives, measured field drawings, condition reports and surveys, materials test reports, and other information gathered during the study can be stored in an archive by the building owner for future reference.

An archival copy should also be provided to the owner, and a minimum of one archival copy kept at the project site and at an appropriate local or regional archive, such as a state historical library. Copies of the historic structure report may also be provided to a local historical organization or university and the state historic preservation agency or historical society. In addition, a copy may be given to the National Trust for Historic Preservation Library at the University of Maryland at College Park, which has established a reference collection of historic structure reports.

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## Summary

Various agencies and organizations have employed historic structure reports as planning tools for many years, for example, the National Park Service, General Services Administration, New York State Office of Parks, Recreation and Historic Preservation, and the Society for the Preservation of New England Antiquities. These and other agencies and organizations may have specific requirements and procedures for reports prepared for properties under their stewardship that differ from those described in this Preservation Brief. All historic structure reports, however, share a common goal-the careful documentation and appropriate treatment of significant historic structures.

The historic structure report is an optimal first phase of historic preservation efforts for a significant building, preceding design and implementation of its preservation, rehabilitation, restoration, or reconstruction. If work proceeds without a historic structure report as a guide, physical evidence important to understanding the history and construction of the building may be destroyed. The preparation of a report prior to initiation of work provides documentation for future researchers. Even more importantly, prior preparation of a report helps ensure that the history, significance, and condition of the property are thoroughly understood and taken into consideration in the selection of an appropriate treatment and in the development of work recommendations. A well prepared historic structure report is an invaluable preservation guide.

**Content and Organization of Report**

Cover Page
Table of Contents
Introduction
  Study Summary
  Project Data

**Part 1 - Developmental History**
  Historical Background and Context
  Chronology of Development and Use
  Physical Description
  Evaluation of Significance
  Condition Assessment

**Part 2 - Treatment and Work Recommendations**
  Historic Preservation Objectives
  Requirements for Work
  Work Recommendations and Alternatives
Bibliography
Appendices
Supplemental Record of Work Performed (section often added later)
  Completion Report
  Technical Data (on work completed)

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**Introduction.** This section includes a concise account of research and investigation findings and recommendations for treatment and use, and a record of project administrative data.

- *Study Summary* - a brief statement of the purpose, findings, and recommendations of the study, including major research findings, key issues addressed by the study, and a summary of recommendations for treatment and use.
- *Project Data* - a summary of project administrative data (e.g., location, ownership, and landmark status of property) and the methodology and project participants.

**Part 1 Developmental History.** This section consists of a narrative report based on historical research and physical examination documenting the evolution of the building, its current condition and causes of deterioration, and its significance.

- *Historical Background and Context* - a brief history of the building and its context, its designers and builders, and persons associated with its history and development.
- *Chronology of Development and Use* - a description of original construction, modifications, and uses, based on historical documentation and physical evidence.
- *Physical Description* - a description of elements, materials, and spaces of the building, including significant and non-significant features of the building.
- *Evaluation of Significance* - a discussion of significant features, original and non-original materials and elements, and identification of the period(s) of significance (if appropriate).
- *Condition Assessment* - a description of the condition of building materials, elements, and systems and causes of deterioration, and discussion of materials testing and analysis (if performed as part of this study).

**Part 2 Treatment and Work Recommendations.** This section presents the historic preservation objective and selected treatment (preservation, rehabilitation, restoration, or reconstruction), requirements for work, and recommended work that corresponds with the defined treatment goal.

- *Historic Preservation Objectives* - a description and rationale for the recommended treatment and how it meets the project goals for use of the building, e.g., rehabilitation for a new use, restoration for interpretive purposes, etc.
- *Requirements for Work* - an outline of the laws, regulations, and functional requirements that are applicable to the recommended work areas (e.g., life safety, fire protection, energy, conservation, hazardous materials abatement, and handicapped accessibility).
- *Work Recommendations and Alternatives* - a presentation of tasks recommended to realize the proposed treatment approach; evaluation of proposed solutions; and description of specific recommendations for work, including alternate solutions, if appropriate.

**Notes, Bibliography and Appendices**

- Footnotes or endnotes
- Bibliography, annotated if possible
- List of sources of information (e.g., archives, photograph collections)
- Appendices (e.g., figures, tables, drawings, historic and current photographs,

reference documents, materials analysis reports, etc.)
- Index (if the report is particularly long or complex)

**Supplemental Record of Work Performed.** This section documents work performed, which may include planning studies, technical studies such as laboratory studies or structural analysis, or other investigation work that was not part of the scope of the original historic structure report, and records physical work on the building (construction documents, annotated drawings, photographs). The section is usually added later to update the report, as most historic structure reports are issued prior to implementation of the recommended treatment approach and specific work. It is sometimes referred to as Part 3 of the report.

- *Completion Report* - a record of the work accomplished, physical evidence discovered during construction, and how findings affect interpretation of the building.
- *Technical Data* - a collection of field reports, material data sheets, field notes, correspondence, and construction documents.

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**Front cover image: Wisconsin State Capitol. Photo: Wiss, Janney, Elstner Associates, Inc.**

This publication has been prepared pursuant to the National Historic Preservation Act, as amended, which directs the Secretary of the Interior to develop and make available information concerning historic properties. Comments about this publication should be directed to: Charles Fisher, Technical Publications Program Manager, Technical Preservation Services, National Park Service (Org. 2255), 1849 C Street, NW, Washington, DC 20240. This publication is not copyrighted and can be reproduced without penalty. Normal procedures for credit to the author and the National Park Service are appreciated. Unless otherwise indicated, photographs are from NPS files. Excepting NPS photos, the photographs used in this publication may not be used to illustrate other publications without permission of the owners.

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