CARING FOR HISTORIC PROPERTIES

PART 1: PRESERVATION PLANNING
Overview of Part 1 – Preservation Planning

- Planning What to Do With Your Historic Resources
  - Planning Documents
  - Treatment Documents

- Secretary of the Interior’s Standards and Guidelines for Preservation Planning
Why Plan?

- Set goals and objectives
- Be consistent
- Create metrics and data
- Improve budgeting process
- Preserve institutional memory
What type of plan do you need?

- Planning-type documents
  - Preservation Plan (and attachments)
  - Preservation Master Plan

- Treatment-type documents
  - Historic Structures Report
  - Treatment Plan
  - Condition Assessment
  - Cultural Landscape Report
Meet the Plans...

- Planning-type documents
  - Preservation Plan (and attachments)
    - Preservation Master Plan
  - Treatment-type documents
    - Historic Structures Report
    - Treatment Plan
    - Condition Assessment
    - Cultural Landscape Report
Municipal Preservation Planning?

- City-wide Preservation Plan
  - Usually a component of the City/County Master Plan

- May include:
  - Survey Plan
  - Strategic Plan for preservation program
Municipal Preservation Plans

- Comprehensive
- Long-term strategic goals and objectives
- Broad Public Input
Municipal Plans can Cover:

- Survey & Identification of historic resources
- Public Outreach & Engagement
- Legal Framework
- Incentives
Municipal Survey Planning

- History never stops – neither does a community’s development
- Ongoing process
- How to create & manage the record of a community’s built environment
Planning - Municipal Outreach & Engagement

- Specific kind of outreach and engagement
- Ensure preservation program is responsive
- Educate public about existing programs and their purpose
Planning - Municipal Legal Framework

- Does design review process work?
- What changes are needed / acceptable to protect cultural resources?
- Is it consistent with underlying state/federal statutes and guidelines?
Municipal Preservation Incentives

- Activating existing federal and state incentives
- Local incentives
- Partnership programs w/ non-profits
Finding Appropriate Uses & Treatments

- Preservation treatments are guided by the Secretary’s Standards for Treatment of Historic Properties
  - Reactive
  - Individualized to each resource
Meet the Plans...

- **Planning-type documents**
  - Preservation Plan (and attachments)
  - Preservation Master Plan

- **Treatment-type documents**
  - **Historic Structures Report**
    - Treatment Plan
    - Condition Assessment
    - Cultural Landscape Report
Historic Structures Reports

- Preservation Brief 43: The Preparation and Use of Historic Structures Reports
- Guide to Historic Preservation (AIA)
- Cover 1 Resource (building or structure)
- Two main sections:
  - History, Development, & Condition
  - Preservation Objectives & Treatment
HSR – Areas to Cover

- **Section 1**
  - Historical Research
  - Condition Survey
  - Investigation & Testing
  - Evaluation

- **Section 2**
  - Selection of Appropriate Treatment
  - Work Recommendations
  - Cost Estimates (if available)
HSR – When to Use?

- Best when treating an individual, stand-alone resource, or a critical component of an historic district
- When significant funding is available
- When a vision for future use is formulated
HSR – Assembling a Team

- Depends on size, scope, and goal of project

- Almost always includes:
  - Architect and/or Historical Architect
  - Historian and/or Architectural Historian
  - Structural Engineer
Meet the Plans...

- **Planning-type documents**
  - Preservation Plan (and attachments)
  - Preservation Master Plan

- **Treatment-type documents**
  - Historic Structures Report

**Treatment Plan**

**Condition Assessment**

- Cultural Landscape Report
Treatment Plan / Condition Assessment

- HSR “Light”

- Includes:
  - Program/use for resource
  - Condition Assessment
  - Treatment Reccs.
  - Cost estimates

- Feasibility Study
TP/CA – When to Use?

- NRHP document is high-quality (i.e., HSR depth not needed)
- Speed is necessary
- Funding is short
- Attached to broader master planning effort
TP/CA – Who does these?

- Architects or Historical Architects
- Architectural Historians
- Depending on what they find, a structural engineer
TP/CA – What to Include

- Cosmetic vs. Structural

- What analyses do you need?
  - Seismic/structural
  - Windows/envelope
  - Roof
  - Masonry?

- What is critical vs. what can wait?

- Focus on treatment, not building history
Summary

- Planning is a tool to save time, money, and resources.

- The appropriate plan depends on the use/program/project