

How to Select a Preservation Consultant or Contractor

Introduction

Owning and caring for historic properties in a *responsible* manner requires people with a preservation ethic - - arrived at inherently, through training, or by avocation - - a particular attitude, and a certain amount of dedication. It also takes qualified and experienced historic preservation professionals and craftspeople.

But how are well-intentioned historic property owners – in other words, **you** – supposed to figure out who “out there” is qualified and experienced to do their preservation design or construction work?

This dilemma may also be exacerbated in emergency situations, such as natural disasters.

Be that as it may, approaching these challenges by following the practical guidance offered here on how to select a preservation consultant or contractor should produce a satisfactory result.

Developing a Preservation Project – A Very Simplified Version

Every preservation project, whether it's replacing a worn or damaged roof, repairing a window, or completely rehabilitating a house or building can be broken down into three basic steps. First is the initial concept of the project – the idea that comes about as a result of identifying or recognizing a need or problem. The second step is planning or designing the project – the means to an end. And, third is actually implementing the plan so that the idea is fulfilled or the problem resolved.

Following this process to complete a preservation project typically takes a team effort involving you, as the client, the preservation consultant, (such as a preservation architect), and other necessary parties, including sub-consultants and contractors. In most cases, you, as the client, define or outline the initial concept of the preservation project and involve the others accordingly and as necessary.

To select the preservation consultant or contractor best suited for your project, you should consider these three factors: **Competence, Chemistry, and Cost.**

Competence

You need to determine the qualifications of each consultant/contractor you select – relevant to your particular project and relevant to each other.

To do this you should first get a sense of their experience, if possible, by researching readily available information, such as requesting pertinent information directly from them (*don't be afraid to ask for references*), visiting their websites, checking with local building inspection or permitting offices, or local organizations like the Better Business Bureau, Main Street / Better Home Town, etc, which might have a track record of their past performance.

Then you need to provide each of them with a fair and consistent description of the project concept, general budget, schedule, and known issues.

Finally, you need to evaluate their responses. Responses may be presented in a variety of formats, including formal written proposals or discussions of the project in meetings or interviews.

The information you should gather includes:

1. How they will approach the project
2. Their interpretation of what the service or work product resulting from the project will be
3. Their experience with other similar projects – ask for examples
4. Evidence of their skill and ability to perform the work – ask for references

5. Who specifically will be working on the project
6. Their availability
7. Can the project, as described, be completed within the budget and schedule
8. An estimate of their fee
9. Up-to-date references

Chemistry

Simply put, you need to determine if your personality and the consultant/contractor's personality are complementary. You will be working together as a team on your project so it's better to have a good working relationship than to have one in conflict. However, this doesn't mean you want someone that always agrees with you or blindly follows your lead. You're hiring someone for his or her expertise and you should expect to be given informed counsel. Nonetheless, it is also a business relationship, so your communication, management, and decision-making styles should be compatible.

When you meet with your potential consultants/contractors ask questions about these matters and see if their answers are acceptable to you.

Cost

While the cost of a project will always be the most likely defining moment for whether a preservation project or activity will actually proceed, it should never be considered out of context with the other two factors. This is because a dollar amount doesn't, in and of itself, mean a project will be successful.

A low bid for work may mean that there are hidden costs. Maybe something you wanted has been left out by mistake or intentionally. To get it will cost you extra. A low bid may mean the consultant/contractor doesn't understand the project or what you expect. Accepting a low bid may mean a difficult working relationship with the winning consultant if your management styles are incompatible. Just how much is that aggravation worth?

Another way to look at cost is to consider selecting the consultant/contractor that provides the service at the *lowest and best cost*. This approach brings all three selection factors into consideration. It may mean you have to re-evaluate the project, such as delaying it until more funding can be acquired or revising the scope of the project. But, because you have included the other considerations in your decision, you should have greater flexibility, consultant/contractor ability, and working relationship to ultimately achieve the successful completion of the project.

Conclusion

When you finally make your consultant/contractor selection, you should enter into a contractual agreement, which should clearly define the scope of project work, consultant/contractor services, financial terms, which should include equitable contract termination provisions and a retainage clause so final payment is held pending receipt of a satisfactory final product, and other aspects of the project or client-consultant/contractor relationship, as applicable, before starting the project work.

Associated with the contract, don't forget to confirm insurance coverage, including liability, workman's compensation, and even job completion insurance (to ensure a project gets finished by someone else at no additional cost to you if, for instance, a contractor "walks off the job" or fails to perform in accordance with the contract). You might also need to confirm licensing, if applicable, of the consultant or contractor you've decided on. Check with your city or county government to find out about local licensing requirements.

Essentially, when selecting and hiring a consultant/contractor and when negotiating and formalizing a contract, be sure **your** best interests are protected, so that you get what you expect, when you expect it, and at the cost you expect.