

Preservation Plan Guidelines for Historic Properties

What is a Preservation Plan?

A Preservation Plan for a Historic Property is a planning and management tool that assembles information about a historic resource (including buildings, sites, structures, and archaeological resources) in order to provide the necessary information to responsibly deal with existing issues and concerns about the resource and plan for its future, guide implementation of recommendations resulting from the plan, and act as a reference source.

It is a comprehensive document or series of documents that guides the development, prioritization, and implementation of repair, rehabilitation, and restoration projects, directs the use and maintenance of the historic property, and functions as a primary source of archival information for planning and reference. A Preservation Plan for a Historic Property integrates all other preservation planning activities, which may be developed separately, such as Historic Structure Reports, Conditions Assessment Reports, archaeological investigations, maintenance plans, and technical reports.

Considerations in Commissioning a Preservation Plan for a Historic Property

Almost by definition, a Preservation Plan should be comprehensive, covering every aspect of documenting and maintaining a historic property. However, developing a Preservation Plan is also dependent on the condition and complexity of the property, the amount of information readily available or attainable, resources available to commission the plan, and the goals of the property's owners or controlling interest. As a result, a Preservation Plan may be a compilation of other reports and documents, such as property histories, Historic Structure Reports, etc. If phased development of a Preservation Plan is or becomes an apparent probability, such an approach should be recognized as an acceptable alternate planning method, acknowledged as circumstantially necessary, and be accompanied by pre-planning to determine the priority of commissioning associated documents to guide the overall planning project toward its eventual goal of a comprehensive Preservation Plan.

While a Preservation Plan is a management tool and some aspects of it overlap broader management concerns, it should not be perceived as an overall site management or master plan, which includes business operations of the property and development plans, etc. (*see also Master Planning Guidelines for Historic Sites*). Instead, a Preservation Plan should concentrate on and addresses those issues that have or may have physical effects on existing features of the historic property.

As a tool, a Preservation Plan is not a static document, but one that should be regularly revised and updated as information and circumstances allow and should be the means by

which preservation and other work to the resource are determined, developed, and recorded. And, as with other preservation planning documents, it should be organized so that it provides necessary information in a manner understandable by the end user, who may not be an expert in the field.

A comprehensive Preservation Plan for a Historic Property should include:

1. Introductory information, including volume designation (as applicable), a table of contents, property identification information, including address, ownership, listing on historic registries, historic names, etc., and an executive summary, including acknowledgements, why the plan is being done and for whom, current use of the property, a summary of the methods used to create the report, etc.
2. Historical Overview – a detailed as possible history of the property, its historic function and any significant personal history associated with it. If copious amounts of information about the history of the property are available, a summary history may be more appropriate, with reference to sources of additional information.
3. Comprehensive Historic Structure Report(s) for all buildings and structures on the property (see also: *Historic Structure Report Guidelines*), including:
 - a. Setting/Environmental/Function Context
 - b. Architectural and Landscape Overview
 - c. Conditions Assessment Report (see also: *Conditions Assessment Report Guidelines*)
 - d. Accessibility Assessment
 - e. Building code issues evaluation
 - f. Recommendations for repair/replacement/restoration/maintenance treatments and associated work projects. Recommendations should be consistent with the *Secretary of the Interior's Standards for the Treatment of Historic Properties*, consider the potential impact of recommended treatments, and avoid significantly altering the property's historic character and context.
 - g. Existing conditions recordation, including site plans, "as built" floor plans and elevations, detail photographs or drawings of significant features, context photo-documentation, and existing conditions detail photo-documentation.
4. Historic Landscape Plan (if applicable) – documentation and plans of existing landscape features and historic plantings, etc. with recommendations for repair/replacement/restoration/maintenance of historic built landscape features, maintaining existing historic plantings and arrangements, recreating known landscaping, or creating appropriate contemporary landscaping to help interpret the landscape aspects of the property.
5. Archaeological Analysis (if applicable) – an evaluation of the site to determine its archaeological potential, identify areas that should be protected from disturbance, and establish procedures for professional investigation and documentation when projects involve ground disturbing activities.
6. Property Use Analysis and associated recommendations – an evaluation of the current use of the property to determine if activities are or potentially causing detrimental physical impacts. Analysis should include owner/occupant use and visitor use. Recommendations should identify ways to modify or regulate use to minimize or eliminate identified problems.

7. Adaptive Use Recommendations (if applicable) – an analysis of the property for other feasible uses, especially if it is vacant, newly acquired, or has a current use that is obsolete and subject to termination, in order to identify those that might keep the property from falling into neglect by providing an active and useful function. Recommendations should be consistent with the *Secretary of the Interior's Standards for the Treatment of Historic Properties*, consider the potential impact of recommended use changes, and avoid adaptive uses that would require significantly altering the property's historic character and context.
8. Maintenance Plan, including identifying and describing short-term and long-term maintenance issues that need to be addressed in appropriately managing and operating the historic property. Such issues include custodial activities, site maintenance, seasonal system inspections, inspection of historic or other features subject to wear and exposure, such as windows, exterior surfaces, and gutters, and infrequent, but predictable, work such as roof replacement and repointing masonry, etc. The Maintenance Plan should also list and establish a schedule for all maintenance items.
9. Future planning activities recommendations. These may include feasibility studies for various potential adaptive uses, nominating property for listing in the National Register of Historic Places, fund raising strategies for preservation projects, special event planning, master planning (see also *Master Planning Guidelines for Historic Sites*), disaster planning, etc.
10. Supplementary information, including, but not limited to: building and site plans, photographs, technical reports (such as hazardous materials- -lead paint, asbestos- -assessments and structural reports), cost estimates, etc. Supplementary information including, as requested, applicable, and available: archaeological investigation reports, cost estimates, technical reports (including Structural Assessment Report, paint analysis, and hazardous materials assessments - -lead paint, asbestos), historic maps (Sanborn Maps), historic photographs, historic plans, reference materials (bibliography of useful preservation books and publications, Secretary of the Interior's Standards, Preservation Briefs, National Register information, etc.), end notes, etc.