

SEVEN STEPS FOR A SUCCESSFUL PRESERVATION PROJECT

So you have a historic building – town hall, church, school, home – and you want to preserve it. Where do you begin? How do you make sure your project is successful over the long haul?

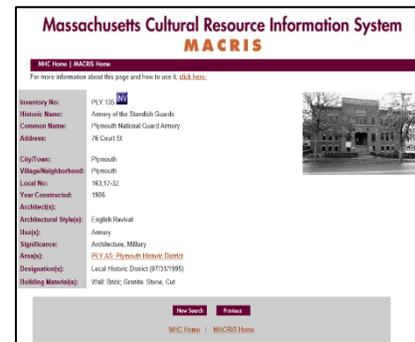
The following are some steps, tips and links to help you get started!

STEP 1 **Historic/Architectural Assessment**

You know why this building or site matters to you, but why should it matter to the rest of the community? How can you make a case that this site should be saved? Having a thorough knowledge of the property’s historic and architectural significance can help you promote your project to local officials and to potential funders and supporters.

You’ll want to know who used this building or site, and what happened there. What interesting stories does this building or site have to tell? What does it reveal about your community’s history? What is significant about its architecture – the way it looks, how it was constructed, who designed it?

If the building is already on the **Massachusetts State Inventory of Historic Resources** or on the **National Register of Historic Places**, the inventory form or National Register (NR) nomination may provide much of the information you need to assess and promote the site’s significance. To find inventory and NR forms, go to the **Massachusetts Historical Commission’s (MHC) online database**, the **Massachusetts Cultural Resource Information System (MACRIS)** - <http://mhc-macris.net/>. Many inventory forms and National Register nominations can be downloaded from MACRIS. If the form you want isn’t online, contact MHC to request a copy.



similar resources in your own community. The National Trust for Historic Preservation also has tips for doing research on historic buildings and homes.

- Boston- http://www.cityofboston.gov/Images_Documents/How%20to%20Research%20a%20Historic%20Building%20in%20Boston_tcm3-18172.pdf
- Andover - <http://www.mhl.org/historicpreservation/research.htm>
- National Trust for Historic Preservation - <https://savingplaces.org/stories/preservation-tips-toolshomep-10-ways-research-homes-history#.XRTeWOhKiUk>

If you need information about architectural styles and American architectural history, check out the references and books below.

- Old House Dictionary: https://www.amazon.com/Old-House-Dictionary-Steven-Phillips/dp/047114407X/ref=sr_1_1?ie=UTF8&qid=1548346589&sr=8-1&keywords=old+house+dictionary
- A Field Guide to American Houses: https://www.amazon.com/Field-Guide-American-Houses/dp/0394739698/ref=sr_1_cc_2?s=aps&ie=UTF8&qid=1548346982&sr=1-2-catcorr&keywords=a+field+guide+to+american+houses
- Historic New England has an online guide to American architectural styles here: <http://www.historicnewengland.org/preservation/your-older-or-historic-home/architectural-style-guide#first-period-post-medieval>
- The following website has a very good illustrated architectural dictionary and guide to architectural styles. Although the site focuses on Buffalo, NY, much of the information applies to Massachusetts examples as well. - <http://www.buffaloah.com/index.html>

Once you know as much as possible about the property's historical and architectural significance, share that information as widely as possible. Do as much as you can to make the community feel as though the building or site is something that should be cherished and preserved for generations to come.

- If your community has a local newspaper, you might consider publishing some articles highlighting the building's history in order to generate excitement about the project.
- Starting a Facebook page is easy (and free) and can serve as a central location for sharing information, updates and outreach for community members.
- Other social media platforms, such as Instagram and Twitter can be extremely helpful also and facilitate sharing. If you are not familiar with how to use social media platforms, inquire at your local library or chamber of commerce about classes or sessions on social media.

STEP 2 Physical Assessment

What is the building's present condition? Is it structurally sound, or does it need new sills or a roof? Is water getting into the building? What needs to be done to stabilize the building and bring it up to code? The key to preserving any building is knowing what the structure's immediate needs are and knowing what work has to be done to meet those needs.



Interior Condition

You may need a variety of experts to help assess the building's condition – architects, engineers, contractors, etc. A good preservation consultant can guide you through the assessment and rehabilitation process, assist you with locating funding sources, and help supervise contractors and subcontractors when work is underway. There are a number of online directories that list preservation professionals.

- Preservation Massachusetts maintains a Preservation Directory on our website: <https://www.preservationmass.org/preservation-directory>
- The National Park Service has qualifications standards for professionals involved in preservation and related fields: https://www.nps.gov/history/local-law/arch_stnds_9.htm
- The Texas Historical Commission has a document on why to hire a preservation professional: <https://www.crt.state.tx.us/Assets/OCD/hp/nationalregister/nominationpacket/WhyHireHistoricPreservationProfessionals.pdf>

Make sure to ask your contractor or consultant what experience he or she has in dealing with buildings of the same age, materials, and construction techniques as your building.

- Ask for a list of similar projects and past clients whom you can contact for references.
- Ask if the consultant has experience working on historic tax credit or grant-funded projects.
- Ask if the contractor is familiar with the Secretary of the Interior's Standards for Rehabilitation of Historic Structures.

Unless the project is a small one, you'll probably want your preservation consultant to prepare a written report of the building's condition. There are two kinds of reports that you might be interested in having:

- 1) A **conditions assessment** provides a summary of the building's current physical problems, and includes recommendations for repair along with cost estimates.
- 2) A **historic structure report** goes into much more depth than a conditions assessment, particularly regarding the building's history and methods of construction. Not only will it discuss needed repairs, but it will analyze the sequence of construction of the building, its history and design, significance and integrity, and its designers and builders.



National Parks Service Preservation Brief 43: Preparation and Use of Historic Structure Reports

You can find information on conditions assessments and historic structures reports at the following websites:

- National Park Service: <http://www.nps.gov/tps/how-to-preserve/briefs/43-historic-structure-reports.htm>
- Architecture Week: How to Write an Historic Structure Report http://www.architectureweek.com/2011/0518/building_1-1.html
- Historic Structure Report Format Example: <http://ohp.parks.ca.gov/pages/1072/files/historic%20structure%20report%20format.pdf>
- New Jersey Historic Preservation Office <http://www.nj.gov/dep/hpo/4sustain/preparehsr.pdf>

Once you have a thorough physical assessment of the building, you will have a good idea of what needs to be done to stabilize it and bring it up to modern safety and accessibility codes.

The National Park Service has a number of technical publications and online tutorials that can help you assess your building and learn about appropriate preservation treatments. Go to:

<http://www.nps.gov/tps/how-to-preserve.htm>

STEP 3 Finding a Use for the Property

If the property is currently vacant, you will need to find a viable use for it. Ideally the property's use should support the costs of ongoing maintenance. Even if the property is occupied, you might want to assess whether it is being used as effectively as it could be. Keep in mind that the more actively used a property is, the more likely it will be preserved over the long run. A house museum that is open only once a month is more likely to fail than a building that has multiple uses and is frequently open to the public.

You might need to do an **assessment of your community** to learn whether there are unmet needs that your site could fulfill. Who are the potential users and/or audience for this site? Do not limit yourself to one type of user, or to the interior of the building. Can the grounds and outbuildings be used as well?

Think beyond museums, exhibits, and historic programming. Could the building host dinners, parties, special events, club meetings? Could it be rented for office or classroom space, housing, artisan/craftsperson studios, retail space? Are there other organizations in the community that might want to share the space with you and become your partners in this project? Is there open land that could be rented to a farmer?

Pay particular attention to uses that will **bring income to the property**, as it is important that the project become financially self-sufficient. A steady income stream is the best insurance that a building will be preserved over the long run.



Voke Lofts: a successful adaptive reuse of a historic mill building in Worcester

You might want to conduct surveys or have someone do a feasibility study to come up with potential uses for the building. A college or university that has a historic preservation or urban planning program might be able to provide assistance with such feasibility work, or help you set up a charette to assess potential uses.

STEP 4 Creating a Plan of Action

Once you've decided what the building's physical needs are and how the building will be used, you'll want to come up with a plan of action. Your plan will be an important document to present to potential funders; it will show them that your concept for the building is organized and well-thought out, and that your goals are achievable. Also, if any of your project's organizers leave the group, a written plan of action will let new members of your organization know what your goals are and keep them on track to complete the project.

In addition to the rehabilitation needs outlined in the conditions assessment or historic structures report, your plan should identify the potential audience for the site, activities that will take place on the site, and the benefits the rehabilitated site will bring to the community. It should also identify long-term income sources.

A good business plan can help you ensure the property will be self-sufficient over the long term. You will also need to plan for any **design review and approval processes** that may impact your project, such as local historic commission review and approval or if there is a preservation restriction on the property. It is important to be aware of these as they can add time to your overall work plan. Check with your local historical commission or online at the Massachusetts Historical Commission's MACRIS website (<http://mhc-macris.net/>) to see what, if any, restrictions may be on your project property.

You might not be able to complete all rehabilitation work at once, particularly if the building is a large one. Work might need to be phased over several years. Your plan should include a timeline for completion of various phases of the work.

- The National Trust for Historic Preservation has a guide to planning rehab and restoration projects: <https://savingplaces.org/stories/10-on-tuesday-how-to-plan-your-restoration-or-rehabilitation-project#.XEnvDVxKiUk>



NTHP Guide to Planning Rehabilitation & Restoration

In order to qualify for preservation grants or tax credits, plans for rehabilitating a property should preserve the property's architectural and historic integrity. Paying attention to these details in the planning stage will save you a lot of grief when you begin construction. The National Park Service has some online tutorials that guide property owners through appropriate rehabilitation techniques here, with many illustrations for correct and incorrect rehab work: http://www.nps.gov/tps/education/online-trainin_g.htm

STEP 5 Finding Funding

How will you pay for your preservation project? Will you apply for grants, ask for donations, take out a loan, use historic preservation tax credits? There are many ways to fund your project, and you'll probably want to take advantage of as many as possible. Preservation Massachusetts has a list of many funding resources available on our website.

- The **Library of Congress** has a directory of foundation grants for museums, archives, and libraries online here: <https://www.loc.gov/search?new=true&q=directory+of+foundation+grants+for+museums%2C+archives%2C+and+libraries+>
- The Foundation Center's online Foundation Directory lists thousands of grant resources: <http://foundationcenter.org/products/foundation-directory-online> This service is available by subscription only. However, many libraries have subscriptions to this resource or have print copies of the directory.
- Fundsnet.com has a free online directory of grants and foundations, searchable by type of grant.
- Philanthropy Massachusetts has several resources and tools online: www.philanthropyma.org

Your project might be eligible for more funding assistance than you think. While there are only a few grant, loan, and tax credit programs specifically targeted at historic preservation projects, many preservation projects include cultural, arts, education, and environmental components that may qualify them for other types of funding.

When looking for funding assistance, consider all aspects of your project.

- Are you trying to make your building energy efficient, or are you working on a historic park or other landscape project? If so, you might qualify for a grant from an environmental organization.
- Can you incorporate an educational element into your project to teach people about the historical, cultural, or architectural aspects of your site? If so, you might qualify for an arts, cultural, or educational grant.
- Will your project enhance your community, promote tourism or business, or create housing? If so, you might qualify for community development funding.
- Explore as many opportunities as you can.

Creating a **written fundraising plan** can help you identify potential funding sources and decide on the best tactics for approaching them. There are many online resources that can walk you through the process of creating a fundraising plan. Some sites that might be worth checking out:

- The Network for Good has a number of free online publications and checklists to guide nonprofits through fundraising and grant seeking. Go to www.fundraising123.org
- Fundraising planning worksheet - http://www.fundraising123.org/files/KleinNP911_Fund_Plan_Worksheet.pdf
- The National Council of Nonprofits has a number of online tools and resources for fundraising and grant writing: <https://www.councilofnonprofits.org>
- Ten Steps to Creating Your Fund Development Plan: <http://www.massnonprofit.org/expert.php?artid=1756&catid=19>
- Creating a 60-day Fundraising Plan <http://www.tripointfundraising.com/creating-a-60-day-fundraising-plan-days-1-15/>
- How to Keep Your Restoration Project From Breaking the Bank, NTHP <https://savingplaces.org/stories/10-on-tuesday-how-to-keep-a-renovationrehabilitation-project-from-breaking-the-bank#.XRIpYhKhhE>

If you're planning on applying for a grant, make sure you learn as much as possible about the grantmaker. If possible, obtain a list of projects they've funded in the past. You might want to contact past grant recipients to learn about their experience with the funding source. Many grant makers will provide examples of successful grant applications, and will give guidance on how to prepare a good application. Some even provide workshops or tutorials for grant seekers.

The Community Toolbox has step-by-step guidelines for writing a grant application: http://ctb.ku.edu/en/dothework/tools_tk_14.aspx

Don't limit your fundraising efforts to grants and foundations. Solicit donations from local businesses and individuals, plan special events and activities, and think about ways that your site can generate income. The more varied and creative your fundraising activities are, the better your chances of success.

STEP 6 Design & Construction

You've determined your building's physical needs, and have raised enough money to get started on design and construction.

How do you find good architects, consultants and contractors? Since 2005, Preservation Massachusetts has maintained a Preservation Directory of many individual consultants and firms who specialize in a variety of preservation related fields.

- Preservation Massachusetts Preservation Directory:
<https://www.preservationmass.org/preservation-directory>
- The Federal Trade Commission also has a brochure on contractor evaluation online here:
<http://www.consumer.ftc.gov/articles/0242-hiring-contractor>
- The National Trust for Historic Preservation has tips for selecting contractors for historic building work.
<https://savingplaces.org/stories/preservation-tips-tools-find-contractors-architects-historic-home-renovation#.XEnvOlxKiUk>

You might want a preservation consultant to assist with your project. A good preservation consultant will make sure that all work meets the appropriate preservation standards; this is particularly important if you're applying for preservation grants or tax credits or submitting your plans for review and approval.

In general, a good historic preservation project should meet the **Secretary of the Interior's Standards for Rehabilitation**. The Standards provide preservation best practices in non-technical language. You can find out more about the standards at the National Park Service's (NPS) website: <http://www.nps.gov/tps/standards.htm>. The NPS site also has good tutorials on the Standards as well as technical publications about many details of construction - from roofs to foundations.



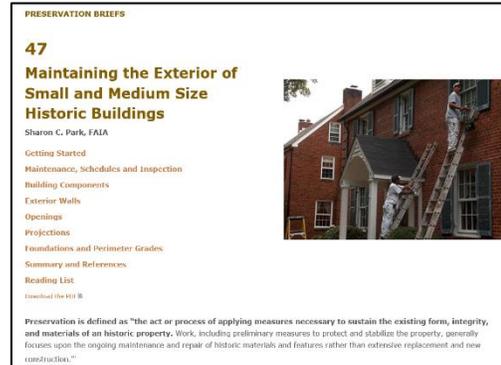
Secretary of the Interiors Standards, National Park Service

STEP 7 Maintenance

Your project is complete! You've had a ribbon-cutting, the building is being used and now you can sit back and relax, right? Well, not quite. If you want to make sure that your building stays in good condition, you'll need to plan for maintenance. Good maintenance plans and procedures will ensure that you catch small problems before they become big, expensive ones.

A **written maintenance plan** and **good record-keeping** will help you keep track of when and how maintenance and repairs were done, who did the work, and how much it cost.

- You'll want to create a schedule for regular inspections of the building and for chores that need to be done at regular intervals (painting, putting windows, cleaning gutters, etc.).
- Know the approximate lifespan of roofs and other building components, and plan for repairs before water starts getting into the building or paint starts peeling. You'll want to set aside funds for anticipated large repairs, like roofs, so that you're not caught empty-handed when expensive repairs crop up.



Preservation Brief 47: Maintaining the Exterior of Small and Medium Size Historic Buildings

Even with the best maintenance plan, the unexpected happens – storm damage, a burst pipe that floods the basement, etc. Plan for disasters before they strike. Make sure that you have an emergency fund set aside for such occurrences. Make sure your insurance is up-to-date and that the property is insured for full replacement value.

The National Trust for Historic Preservation has some online resources that can help you with disaster planning:

- Disaster Planning and Recovery <https://savingplaces.org/stories/10-tuesday-toolkit-round-disaster-prevention-recovery-historic-places#.XEnxwVxKiUk>
- 10 Steps to Mitigate Natural Disaster Damage <https://savingplaces.org/stories/10-tips-to-mitigate-natural-disaster-damage#.XEnx7FxFkiUk>

If you're having difficulty finding appropriate insurance because of the historic nature of your property, you might try contacting National Trust Insurance Services, which specializes in insurance for historic properties - <http://nationaltrust-insurance.org/>

The following websites provide information and models for maintenance planning.

- The National Park Service has a publication on maintaining historic buildings here: <http://www.nps.gov/history/hps/tps/briefs/brief47.pdf>
- Whole Building Design Guide has an online resource that discusses creating an Operations and Maintenance Plan for historic structures. http://www.wbdg.org/resources/omhs.php?r=ensure_health
- Maintenance Guide for Historic Homeowners <http://www.carson.org/Modules/ShowDocument.aspx?documentid=32085>
- Historic New England's recommended maintenance schedule for historic properties: <http://www.historicnewengland.org/preservation/your-older-or-historic-home/recommended-maintenance-schedule>

In addition to the steps in this document, there are several excellent online resources that outline steps for historic preservation projects: http://www.wbdg.org/design/apply_process.php
<http://www.preservationpa.org/page.asp?id=54>

7+ Pay It Forward

Congratulations on a successful project! Preservation is catalytic, meaning if one successful project happens, chances are there will be interest in future projects in other historic buildings around your community. Showcasing your project, through social media, news articles, discussions, open houses, community forums, award programs, etc. can help keep the preservation train moving while sharing valuable lessons. People learn best from those who have gone through the process themselves. If you want preservation to succeed in your community, beyond your project, becoming a resource yourself is a great thing. Be willing to talk about the project and process, owning the ups and downs. Offer to speak at public forums, conferences or gatherings that involve preservation, public history, community activism and more. Sharing your story is an important way to make sure all of the great work you put in doesn't get forgotten after the project is completed. Preservation Massachusetts' Storytellers series shares and promotes these experiences from all across the Commonwealth and are available on our website.

Just remember that preservation takes time, often a lot more time than you think. But if you have a clear vision, plan and dedication to the restoration and active use of your historic building, you can and will succeed!

And throughout your process, Preservation Massachusetts is available to you as a resource, supporter and partner!

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Oscar Romero House in New Bedford was vacant for over 15 years and in deplorable condition before its renovation



Oscar Romero House after renovations done by Community Action for Better Housing (part of Catholic Social Services), WHALe, and NEI General Contracting.