

A CHECKLIST FOR REHABILITATING HISTORIC BUILDINGS

Introduction

Rehabilitation acknowledges the need to alter or add to a historic building to meet continuing or changing uses while retaining the building's historic character.



This series of questions is designed to help anyone who is considering the rehabilitation of a historic building. The checklist suggests a typical process of documenting, evaluating, and assessing a historic building prior to undertaking rehabilitation work.

Please note that the following is general guidance; therefore, it cannot be used to determine which features of a specific historic building are important in defining the historic character and must be preserved, or which features could be altered - if necessary - for the new use. This kind of careful case-by-case decision-making is best accomplished by seeking assistance from qualified historic preservation professionals in the planning stage of the project. Such professionals include architects, architectural historians, and historians who are skilled in the preservation and rehabilitation of historic buildings.

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1. Check Available Documentation

What historical or architectural documentation is available about the building and site that can help to determine how it looked early in its history, as well as the cumulative changes made over time? For example:

- state or local historical survey or inventory
- historical documents, views, photographs in libraries, archives, historical societies, recorded by Historic American Buildings Survey/Historic American Engineering Record
- National Register nomination

2. Evaluate the Historic Character (The Way It Looks Today)

Historic buildings are physical records of past inhabitants.

The character-defining aspects of the building that need to be identified and evaluated may include the form and detailing of interior materials, such as masonry, wood, and metal; exterior features such as roofs, porches, and windows; interior materials, such as plaster and wood; and interior features, such as moldings and stairways, room configuration, and spatial relationships, as well as structural and mechanical systems.

What is the original configuration of the building? What are the architectural changes that have been made over time during successive occupancies?

They may include:

- additions such as a porch, wing, or upper story
- changes to surfaces and finishes (unpainted to painted, slates to asphalt; polychrome to monochrome)
- blocking of windows, removal of shutters
- changes to grade
- change to a cornice, loss of stairs or steps
- adding false fronts
- changes to basic plan (single family to multiple family).
- changes to the building site

Remember that most buildings change over time with different occupancies and uses. These changes may or may not be an integral part of the historic character and should be evaluated very carefully prior to work.

3. Assess Architectural Integrity, Including Physical Condition

Has the architectural integrity of the historic building and its setting been assessed?

Architectural integrity means the intactness of the building as an architectural system (its plan, features, materials, finishes, and structural system).

Are there physical problems that threaten the building's architectural and structural integrity?

Has a structural survey determined deficiencies due to settlement, deflection of beams, seismic inadequacy, or cuts through structural members for mechanical pipes and ducts?

Is there inherent material damage, such as material failure due to poor design, poor quality materials, severe environmental or moisture problems, neglect, or improper maintenance?

Is there human-inflicted damage, such as removed or lost ornamentation, inappropriate coatings, bad repointing or cleaning, insensitive additions, or partitioning of significant interior spaces?

Are historic features hidden behind later alterations? These may include ornamental ceilings or cornices obscured by dropped ceilings.

4. Plan for the Rehabilitation Work

Have both the interior and exterior of the historic building been thoroughly photographed to document their condition prior to any construction work?

Will testing be needed to determine the condition of the materials or the systems?

Will the project require specially fabricated replacement materials, such as terra-cotta or ornamental metals?

Will the project involve specialized crafts, such as stone carving or ornamental plastering, and if so, where can the necessary expertise be found? It is generally necessary to write unique specifications rather than use standard specifications for certain types of work on a historic building.

Will the impact of a proposed new addition or adjacent new construction be minimized by keeping the size, shape, materials, and detailing in scale with the surrounding environment?

What protective measures will be taken to preserve character-defining features and finishes during the construction work?

Will the project require making bathrooms or other areas and amenities accessible to persons with disabilities? Have options been studied to achieve accessibility without threatening or destroying character-defining interior spaces, features, and finishes?

On the exterior, will the rehabilitation work preserve distinctive historic fabric and the historic character? Loss of fabric or change of character often occur when:

- storefronts are altered
- visible skylights are added on top of an existing building
- new dormers are added on prominent roofs
- entire new floors are added on top of an existing building
- porches are enclosed
- new window openings are created

- brick walls are abrasively cleaned
- configuration and detailing of new window sash is historically inappropriate

On the interior, will the rehabilitation work preserve distinctive historic fabric and the historic character? Loss of fabric or change of character often occur when:

- principal rooms are partitioned
- interior plaster is removed to expose brick
- interiors are gutted to introduce new atriums or add new floor levels
- significant stairs are removed or altered
- prominent hallways are narrowed in width
- decorative ceilings are covered by dropped ceilings

Will an architect or other qualified historic preservation personnel be available during construction to ensure that work is carried out according to established preservation principles?

Have construction personnel received adequate training in undertaking historic preservation work?

5. Check Codes and Other Legal Requirements

Are there easements, overlay zones, or local ordinances governing alterations to property (check deed records, zoning offices)?

Depending on the current or anticipated use (museum, commercial/retail, public space), how does the Americans with Disabilities Act, a federal civil rights law, apply to the historic building?

How do state and local building codes apply to the historic building? What impact will they have upon the character and integrity? Are code variances available? Are there code equivalency possibilities for the building?

Is local historic preservation commission review required?

6. Check Use of Federal Funds / Review Requirements

Will federal funds be involved in the project, necessitating review by the State Historic Preservation Office and consultation with the Advisory Council on Historic Preservation?

Will federal [historic preservation tax incentives](#) be used? If so, do you have a copy of the *Secretary of the Interior's Standards for Rehabilitation* (36CFR 67)?

Have you obtained a copy of the *Historic Preservation Certification Application* package from the State Historic Preservation Office?

Please note that for federal historic preservation tax credits, the *Secretary of the Interior's Standards for Rehabilitation* (36 CFR 67) take precedence over local requirements and design guidelines.

7. Check Available Publications [Top](#)

- [Caring for the Past](#), a catalog of historic preservation publications developed by Technical Preservation Services, National Park Service. This comprehensive listing of sales publications includes the *Preservation Briefs* series, *Preservation Tech Notes*, and *Guidelines for Rehabilitating Historic Buildings*.
- [The Secretary of the Interior's Standards for Rehabilitation](#). (1990) in English or Spanish (please specify). 36 CFR 67.
- [Historic Preservation Tax Incentives](#), an overview of the federal Preservation Tax Incentives program and its requirements.
- [Historic Preservation Certification Application](#), used to apply for the federal Historic Preservation Tax Incentives.
- [Contact the **National Park Service**](#)