

Historic Structure Assessment Scope of Work

(Modified from State Historic Fund)

COVER PAGE

The Cover Page of the report must include:

1. *The name and address of the property*
2. *The date of report completion*
3. *The required acknowledgement of HPF as a funding source* (“This project was paid for by Louisville Historic Preservation Fund grant.”)
4. *State Site Number, if applicable*

TABLE OF CONTENTS

Please number pages in the report, and include the pages in the Table of Contents.

1.0 INTRODUCTION

1.1 RESEARCH BACKGROUND / PROJECT PARTICIPANTS

Discuss the purpose of the project and describe the process taken to complete the report, including:

1. *List consultants involved in preparing the report, and what their roles were.*
2. *Note weather condition(s) experienced during all field (site) visits.*
3. *Include sources of information used to complete this report, including available historical documentation and interviews with building users/managers as relevant (see Section 2.0).*

1.2 BUILDING LOCATION

Please provide the following:

1. *Vicinity map*
2. *Site plan (Site plans should show the property lines, as well as the designated area, and display all of the improvements, features, and landscape elements within the property boundaries. Indicate a north arrow and scale or NTS.)*
3. *Legal description*

2.0 HISTORY AND USE

The research and analysis of the structure’s history and use determines the basis for the preservation treatment recommendations prescribed in the assessment section. This portion of the HSA includes a history of the resource, the architectural significance and construction history, and a detailed discussion of the proposed use. A basic social history, prepared by the Louisville Historical Museum, for each property is available from the Louisville Planning Department.

Potential sources for information:

Louisville Planning Department, Louisville Historical Museum, Louisville Library, Boulder County Property Assessor, Carnegie Library - Boulder

2.1 ARCHITECTURAL SIGNIFICANCE & CONSTRUCTION HISTORY:

Describe the structure’s architectural style, including character-defining exterior and interior materials, features, and spaces. Include a general chronology of additions and alterations to the original structure, and discuss past and current use(s) in relation to these modifications. This information will provide the basis for recommendations for appropriate treatments and design of suitable modifications for use.

1. *Note whether or not the building is listed on the National, State or Local Register.*
2. *Include historical photographs of the structure’s exterior and interior*
3. *Excerpt portions of referenced documents that are relevant to the building/resource.*

2.2 FLOOR PLAN:

The structure(s) should be graphically represented in accurate proportions. The plan(s) should be drawn with measurements, but it is not required to be drawn to scale. In this section, you must:

1. *Label individual rooms for reference within the narrative of Section 3.0.*
2. *Show the general chronology of additions.*
3. *Note/identify within the plan or illustrations significant spaces and/or spatial relationships.*
4. *Indicate a north arrow and scale or NTS.*

2.3 PROPOSED USE(S):

Discuss any proposed use(s) or alterations, including the functional needs and potential impact to the existing structure, and evaluate whether or not the intended use or alteration is appropriate for the structure in accordance with The Secretary of the Interior's Standards and the Louisville Municipal Code.

3.0 STRUCTURE CONDITION ASSESSMENT (SECTIONS 3.1-3.8)

Each section below should be addressed in a comprehensive narrative. In order to provide a more user-friendly and organized document, please include a separate sub-heading under each section for the three main components of the narrative: (1) **Description**, (2) **Condition Evaluation**, and (3) **Recommendations**. (For example, when discussing the Roof Framing System in section 3.3, you will include a Description of the system, a Condition Evaluation of the system, and a Recommendation of what to do with the system based on The Secretary of the Interior Standards and future plans/use.) The sections describing materials, features, elements, and spaces should follow the specific order listed in the Historic Structure Assessment outline provided below (e.g., 3.1 Site; 3.2 Structural System; etc.). If the resource does not have a component, simply indicate this in the narrative (e.g., "Perimeter foundation drainage: There is no perimeter foundation drainage.").

DESCRIPTION: Please *describe* each element, feature or space.

The intent of this subsection is to identify the elements, features, and spaces that make up the resource. The narrative should first indicate whether the element, feature, or space is original, historic or non-historic, and should then provide a detailed description of **what it is, what it looks like, the materials from which it is made, and the methods used in its construction**.

The Description sub-heading should not include information about the condition: Perhaps one of the most common mistakes is to include a discussion of the *condition* of each material, element, feature, or space as part of the *description* narrative—it is important to avoid this. The intent is to describe the element, feature, or space as it exists at this point in time (e.g. "Interior walls are plaster over wood lathe, with a smooth texture and painted finish [see photos #2, 3, 12 and 15]."). This serves the purpose of documenting the material, element, feature, or space as it exists now so that in the future, users of the assessment will have a clear understanding of how this looked prior to any treatment.

Significance: Please identify each element's, feature's, or space's relationship to the age of the structure and identify its significance as it relates to the integrity of the resource overall. It is important to remember that all materials, elements, features, and spaces of a structure impact the resource's historic integrity (contributing to or detracting from); therefore, each component should be described regardless of its historic significance. A significant element, feature, or space should be described in greater detail and include **photographic documentation** to illustrate that description.

Windows, doors, and other repetitive elements or features: Often an element or feature is a series of similar, repetitive items, such as windows or doors. In this case, the feature should be described as one feature and then specific discrepancies should be noted or highlighted—for example, "all nine windows on the 3rd floor are historic, the six 1st floor windows are not." Although describing as *one*, please include the total quantity of the element or feature in the

description. A schedule to augment the narrative may be included. Remember to include even small repetitive elements such as hardware, lighting, and security.

CONDITION EVALUATION: Please *evaluate the condition* of each feature, element, or space. Please provide a detailed discussion of the **existing condition and integrity** of each element, feature or space based on the comprehensive physical evaluation. As noted above, destructive investigation is acceptable as a means of obtaining information, but it is not required. The Condition Evaluation must include **photographic documentation** to illustrate the condition (or range of conditions for repetitive elements or features). Please use the following terms in your evaluation and discussion of the condition of each element, feature, or space: **Good Condition**, **Fair Condition**, and **Poor Condition**. Criteria/guidelines for each are as follows:

- ▶ **GOOD CONDITION:** An element, feature, or space is evaluated in *good* condition when it meets the following criteria:

1. *It is intact, structurally sound, and performing its intended purpose.*
2. *There are few or no cosmetic imperfections.*
3. *It needs no repair and only minor or routine maintenance.*

Please note: Elements, features, or spaces that are in *good* condition do not need lengthy narratives; state that they were examined and found to be in *good* condition, and why you have made that determination.

- ▶ **FAIR CONDITION:** An element, feature, or space is evaluated in *fair* condition when one or more the following are evident:

1. *There are early signs of wear, failure, or deterioration, although the feature or element is generally structurally sound and performing its intended purpose.*
2. *There is failure of a sub-component of the feature or element.*
3. *Replacement of up to 25% of the feature or element is required.*
4. *Replacement of a defective sub-component of the feature or element is required.*

Please note: When an element, feature, or space is in *fair* condition, it is important to provide a comprehensive discussion of this evaluation; **do not** simply state that the condition is “fair” without explaining that evaluation. Also, please avoid using generic descriptors such as “weathered” or “damaged” without a more specific explanation (e.g. how/why is it weathered/damaged).

- ▶ **POOR CONDITION:** An element, feature, or space is evaluated in *poor* condition when the following is evident:

1. *It is no longer performing its intended purpose.*
2. *It is missing.*
3. *It shows signs of imminent failure or breakdown.*
4. *Deterioration/damage affects more than 25% of the feature/element and cannot be adjusted or repaired.*
5. *It requires major repair or replacement.*

Please note: When an element, feature, or space is in *poor* condition, it is important to provide a comprehensive discussion of this evaluation; do not state that the condition is “poor” without explaining that evaluation. Also, please avoid using generic descriptors without a more specific explanation.

RECOMMENDATIONS: Please provide a *recommendation* for each element, feature or space, based on (1) the evaluation of existing conditions and (2) the significance or importance of the building and its associated features and elements. Recommended treatments should comply with, and specifically address, *The Secretary of the Interior’s Standards for the Treatment of Historic Properties* and the recommendations in the *Guidelines* (e.g., “recommendation is based on *Preservation Brief 9: The Repair of Historic Wooden Windows...*”).

If an element, feature, or space has been evaluated in *good condition*, and there is no recommendation, state, “No recommendation at this time.” For all others, consider the following when making a recommendation:

1. *The needs of the resource should be considered the first priority (sometimes a proposed use or treatment is contrary to the best interest of the resource).*
2. *Recommendations should discuss a specific course of action (**not**: “Repair according to the Standards”).*
3. *Clearly explain and substantiate recommended treatments within the context of the selected treatment approach.*
4. *If more than one treatment is viable, discuss the pros and cons of each approach/option.*
5. *Provide sufficient information and analysis to aid in the preparation of future construction documents.*
6. *Research and provide alternative solutions when the recommendation conflicts with the guidelines for The Standards. Consult the NPS Preservation Briefs and Tech Notes for potential solutions/alternatives.*
7. *Consider the future welfare of the resource, and the practicality of maintenance, when recommending treatments.*
8. ***Do not** present the quickest, easiest, or most economical solution as the only recommendation.*

3.1 SITE:

- Associated Landscape Features
- Grading/Grading
- Parking
- *Archaeology (optional)*

3.2 STRUCTURAL SYSTEM:

- General Structural System Description
- Foundation Systems
- Floor & Ceiling Systems
- Roof Framing System

3.3 ENVELOPE – EXTERIOR WALLS:

- Exterior Wall Construction
- Exterior Finishes
- Exterior Masonry
- Exterior Appendages—Porch, Stoop, Portico, etc.

3.4 ENVELOPE – ROOFING & WATERPROOFING:

- Roofing Systems
- Sheet Metal Flashing
- Perimeter Foundation Drainage
- Drainage System, Gutters & Downspouts
- Skylights / Cupolas

3.5 WINDOWS & DOORS:

- Doors (including Hardware, Casing/Trim, and Finishes)
- Windows (including Hardware, Casing/Trim, and Finishes)

3.6 INTERIOR FINISHES (Optional)

- *Wall Finish Materials*
- *Ceiling Finish Materials*
- *Floor Finish Materials*
- *Trim and Built-Ins (not previously addressed in Section 3.5)*

3.7 MECHANICAL SYSTEMS*:

- Heating & Air-Conditioning

- Ventilation
- Water Service, Plumbing, & Sewer Utilities
- Fire Suppression—Sprinklers

3.8 ELECTRICAL SYSTEMS*:

- Electrical Service & Panels
- Electrical Distribution System
- Lighting
- Fire Detection System
- Security Systems

*For residential briefly describe.

4.0 ANALYSIS AND COMPLIANCE

In-depth code review and materials analyses may be completed for the structure. However, at a minimum, general observations on each of the following are required, and should be based on the information in Section 2.0, History and Use, and Section 3.0, Structure Condition Assessment.

4.1 HAZARDOUS MATERIALS:

- Provide observations of likely sources (e.g., lead paint, asbestos); materials testing may be recommended.
- For residential, recommend if testing is needed.

4.2 MATERIALS ANALYSIS (COMMERCIAL ONLY):

- Suggest further testing as warranted for creation of specifications (i.e., paint, mortar, masonry, finishes).

4.3 ZONING CODE COMPLIANCE:

- Identify potential conflicts between zoning requirements and the proposed use(s).
- For residential, include Floor Area Ratio and Lot Coverage Analysis per the Old Town Overlay.

4.4 BUILDING CODE COMPLIANCE (COMMERCIAL ONLY):

- List the code(s) referenced. Consider alternate codes (UCBC, IEBC) and possible variances.
- Identify potential conflicts between applicable building codes and retention of historic elements, features, materials and spaces.

4.5 ACCESSIBILITY COMPLIANCE (COMMERCIAL ONLY):

- Identify potential conflicts between meeting ADA Accessibility Guidelines and retaining the building's historic integrity.
- Recommendations for alterations needed to meet accessibility requirements should reflect an effort to minimize material loss and visual change to a historic building.

5.0 PRESERVATION PLAN

The Preservation Plan should take the recommended treatments prescribed in section 3.0 Structure Condition Assessment and **prioritize** the work into a logical order. This order should rank the most urgent work, such as deterioration, structural weakness, and/or life safety issues, over less urgent repairs. In the discussion provided for sections 5.1-5.3, please remember the following:

1. *All recommended treatments should be included in the Preservation Plan.*
2. *The first priority of the Preservation Plan should be to address the needs of the historic building/resource.*
3. *Programmatic needs of building owners and/or clients need to be represented as secondary priorities.*

5.1 PRIORITIZED WORK:

Recommended Treatments for elements, features, or spaces should be prioritized and identified utilizing the following terms: Critical Deficiency, Serious Deficiency, and Minor Deficiency. Criteria/guidelines for each are as follows:

- ▶ **CRITICAL DEFICIENCY:** One or more of the following indicate a critical deficiency:
 1. *Advanced deterioration has resulted in failure of the building element, feature, or space, or will result in its failure if not corrected within two years.*
 2. *Accelerated deterioration of adjacent or related building materials has occurred as a result of the feature or element's deficiency.*
 3. *The feature or element poses a threat to the health and/or safety of the user.*
 4. *The feature or element fails to meet a code/compliance requirement.*
- ▶ **SERIOUS DEFICIENCY:** One or more of the following indicate a serious deficiency:
 1. *Deterioration, if not corrected within two to five years, will result in failure of the feature or element.*
 2. *Deterioration of a feature or element, if not corrected within two to five years, may pose a threat to the health and/or safety of the user.*
 3. *Deterioration of adjacent or related building materials and/or systems will occur as a result of the deficiency of the feature or element.*
- ▶ **MINOR DEFICIENCY:** One or more of the following indicate a minor deficiency:
 1. *Standard preventive maintenance practices and building conservation methods have not been followed.*
 2. *A reduced life expectancy of affected or related building materials and/or systems will result.*
 3. *A condition exists with long-term impact beyond five years.*

5.2 PHASING PLAN:

If work is to be completed in more than one phase, propose a logical and sequential phasing plan.

- *Phased plans need to consider mobilization, seasons, sequencing, protection of building, and current uses.*

5.3 ESTIMATE OF PROBABLE COST OF CONSTRUCTION:

Dated cost estimates should reflect the current market and include a percentage cost increase to account for inflation if the project is phased or delayed. (If applicable, please include cost estimates for archaeological monitoring, hazardous materials testing, and/or abatement.)

6.0 PHOTOGRAPHS AND ILLUSTRATIONS

Historic and current photographs and illustrations should be included with the assessment to illustrate and support the information provided in the narrative. Where the photographs and illustrations are located in the report is optional (in each section, after each section, at the end of the report, etc.). Follow the guidelines below for photographs and illustrations:

1. *Provide comprehensive and "readable" (i.e., high quality and clear) photographic documentation.*
2. *Photographs and illustrations should be clearly numbered and captioned.*
3. *Provide at least one view of each elevation.*
4. *Provide clear pictures of specific conditions and deficiencies that are discussed.*
5. *In the narrative, include in-text references to the numbered photographs (for example, "Due to poor drainage, the lower portion of the column is significantly deteriorated [see photos 3, 5, and 6]").*

7.0 BIBLIOGRAPHY

List all consulted sources. All the sources you have utilized should be listed alphabetically following a recognized bibliographic style (e.g., Chicago Manual of Style/Turabian, Modern Language Association (MLA), American Psychological Association (APA)).

- Indicate if the consulted sources did, or did not, contain pertinent information.

8.0 APPENDICES

Drawings and other information should be included in the appendices

- Historical/original plans (if available) may be included.
- Schematic design, design development, construction drawings, or measured drawings (previously prepared, or prepared outside the scope of this HSA) may be also included in addition to the sketch plans provided under Section 2.2, but are not required.