

Old House Guide

8/10/07

Compiled from:

Old House Journal

XXX- national park service web pages/Office of HP

XXX- HRB web pages

XXX- www.sohosandiego.org

XXX- AIA Guide to HP

XXX- my jargon to fill in

XXX- oldhouses.com.au/docs/oldrule.html

XXX- www.historicvallejo.org/contactUs/FAQ.shtml

XXX- Indianapolis study

XXX- Oakland Heritage Org.

XXX- "Homes" by Sara Schaefer Munoz

XXX- "Homework"

I. Overview of Historic Preservation in San Diego

If we wish to have future with greater meaning, we must concern ourselves...with the total heritage of the nation and all that is worth preserving from our past as a living part of the present. —With Heritage So Rich, 1966

A. SOHO

1. Mission Statement

Since 1969, Save Our Heritage Organisation (SOHO), a non-profit 501©3 organization, has been a powerful catalyst for preservation of our nation's heritage by raising awareness and appreciation of the architectural and cultural heritage of the San Diego region. Through education, advocacy, and stewardship our mission is to preserve, promote and support preservation of the architectural, cultural, and historical links and landmarks that contribute to the community identity, depth, and character of our region.

SOHO is the only resource for historic homeowners and answers thousands of inquiries each year. Educating the public is a large part of our mission and our success. We hold several annual preservation themed events. These are comprehensive and cultural events that include programs such as: lectures, workshops, architectural tours, art, antique and artifact exhibitions and resources and references. The events showcase the diverse range of architecture, history and culture in San Diego.

2. Who

Affiliated with the National Trust for Historic Preservation. The National Trust is a nationwide educational organization that encourages Americans to participate in preserving the best of their heritage. Chartered by Congress in 1949, the Trust cares for historic properties around the country.

B. Who's Who In Historic Preservation

California Office of Historic Preservation, OHP

The OHP and the State Historic Preservation Officer, SHPO, administer both the state and federal historic preservation programs and carry out a wide range of activities that encourage the preservation of cultural remains of our past. Historical state registration programs maintained by OHP for significant

cultural resources, include the new CA Register of Historical Resources and State Historical Landmarks and State Points of Historical Interest. OHP maintain the master list of state owned historical resources. State Agencies must consult with OHP prior to initiating any undertaking that would affect a listed or eligible resource. The CA Environment Quality Act, CEQA, may require that significant historical resources be identified and considered during the local or state planning processes. The responsibility for compliance, however, lies at the local level. OHP administers the National Historic Preservation Act, NHPA, in CA. The National Register of Historic Places has formed the basis for this federal program since 1966. Local governments that meet specific standards are also eligible to be certified by National Park Service, NPS, to carry out certain preservation responsibilities at the local level under the Certified Local Government programs. OPH provides forms and guidelines for all of these programs; consults with local governments, community organizations, and property owners, advises people preparing nominations; and reviews certification applications.

State Historical Resources Commission, SHRC

The SHRC is a state review board with professional and public members. The Commission reviews applications for listing historic properties on the National Register of Historic Places, the CA Register of Historic Places, and for designation as State Historical Landmarks and State Points of Historical Interest. Commission recommendations for National Register nominations are forwarded with the SHPO's concurrence to the Keeper of the National Register in Washington, D.C., and for state designation to the Director of the CA Department of Parks and Recreation in Sacramento.

California Preservation Foundation, CPF

CPF is a state wide, non-profit, tax-exempt educational organization. CPF is an advisory organization dedicated to fostering historic preservation in CA. Among its activities are sponsorship of the annual CA Historic Preservation Conference, workshops, publications, films, and technical assistance.

California Council for the Promotion of History, CCPH

CCPH is a non-profit organization which advocates the conservation and perpetuation of CA's diverse historical resources. It seeks to foster, facilitate, and coordinate efforts involving the greater appreciation of the state's historical heritage, the application of history skills in both the public and private sectors, and the preservation, interpretation and management of historical resources. Membership is open to any person in CA who wishes to participate in its activities and share its goals. Members receive a CCPH newsletter and notices of special activities. CCPH sponsors an annual conference designed to foster an appreciation of CA history.

Society for California Archaeology, SCA

SCA is a non-profit organization that serves to promote and set standards for archeological research within CA.

California Main Street Program

The California Main Street Program is designed to demonstrate the

effectiveness of historic preservation programs as a revitalization methodology to help reverse the decline of downtown core areas.

State Historical Building Safety Board

State Historical Building Society Board is composed of representatives of the building design professions and state and local officials. It is authorized to advise and consult with local officials. It is authorized to advise and consult with local building officials regarding use of the alternative State Historic Building Code when reviewing the rehabilitation of historic properties.

California Heritage Preservation Commission

The California Heritage Preservation Commission advises the California State Archives on the retention and preservation of the State's historic government records. It also serves as the State review board for National Historic Publications and Records Commission.

The Native American Heritage Commission

The Native American Heritage Commission is a nine member commission appointed by the governor, assigned to address the religious and cultural concerns of California Indians. Its members represent Native American communities throughout California.

California Historical Society

The CA Historical Societies (CHS) is a statewide historical society with a strong educational component. Its publications, programs, exhibits, seminars, and library stimulate an interest in history and help the general public achieve a wider appreciation of the historic events which continue to shape CA.

National Park Service

The National Park Service (NPS) administers grants awarded to the state offices of historic preservation for the implementation of the National Historic Preservation Act, as amended. The National Register of Historic Places, the Historic American Buildings Survey, and the Historic Preservation Fund grants to Indian Tribes are programs managed by the NPS.

Advisory Council on Historic Preservation

This council was established by the National Historic Preservation Act of 1966. It advises the President and Congress on matters pertaining to the preservation of historic, archaeological, architectural, and cultural properties.

National Trust for Historic Preservation

The National Trust for Historic Preservation is a private, nonprofit membership organization chartered in 1949 by Congress to preserve historically significant properties and to encourage public participation in the preservation of buildings, sites, objects, and maritime property important in American history and culture. The National Trust's services include providing advisory and technical assistance to private preservation organizations, collecting and exchanging information on successful preservation projects, providing guidance to new preservation programs and groups, and carrying out special projects to further preservation of target areas.

- C. (insert) Architectural Timeline of San Diego

1. Layout of Time in Reference to Architects, Settlement, Historical Events show importance of San Diego's Heritage in Relation to U.S.

II. A B C's of Preservation

A. What is Historic?

Buildings, Districts, Landscapes, and other features are considered historic if they are "significant" and possess "integrity." "Significance is achieved in several ways:

- * Association w/historic events, activities, or patterns
- * Associated w/important persons
- * Distinctive physical characteristics of design, construction, or form
- * Potential to yield important information

Historic is generally considered to be 50 years or older, but more recent buildings are considered for landmarking sooner based on their individual merits

1. what has historic integrity?

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

"Integrity" is subjective, however it must be grounded in a understanding of a structure's physical features and how they relate to it's surroundings to make it significant.

* Location: The place where the historic property was constructed or where a historic event occurred.

* Design: The combinations of elements that create the form, plan, space and style of a property.

* Setting: The physical environment of a historic property.

* Materials: The physical elements that were combined or deposited during a particular period of time and in a certain pattern or configuration to form the property.

* Workmanship: The physical evidence of the crafts of a particular culture during any given period in history or prehistory.

* Feeling: A property's expression of the aesthetic or historic sense of a certain period of time.

* Association: The direct link between an important historic event or person associated w/historic property.

B. Understanding the Process of Preservation

HP is not simply a matter of competently repairing a building or altering it for a new use. It requires a creative design process just as a new building does. This involves collecting and analyzing information, evaluating the impact or alternative treatments, conceptualizing how the building may be used or interpreted in the future, and then implementing a series of coordinated design decisions to achieve a set of project goals. – AIA Guide to HP

Alternative treatments- properly preserving a building or site is a design process. As in any other design process, there will be series of choices involving future use, materials repair or replacement, period of restoration, interior environment, code compliance, alteration of equipment, furnishings, and landscape concerns

Maintenance -- critical importance in the preservation of historic resources should not be overlooked. Maintenance is preserving. Serious preservation problems arise b/c ordinary, routine maintenance has been deferred or is nonexistent. W/ reg. maintenance, the life of a structure or resource can be

measurably extended w/o loss of historic fabric. To preserve, adequate planning and funding is required for all maintenance needs.

C. Why preserve?

The spirit and direction of the Nation are founded upon and reflected in its historic heritage.

The historical and cultural foundations of the Nation should be preserved as a living part of our community life and development in order to give a sense of orientation to the American people.

Historic properties significant to the Nation's heritage are being lost or substantially altered, often inadvertently, with increasing frequency.

The preservation of this irreplaceable heritage is in the public interest so that its vital legacy of cultural, educational, aesthetic, inspirational, economic and energy benefits will be maintained and enriched for future generations of Americans.

Part of our commitment as citizens of San Diego is to help evolve this city to become the best San Diego that it could be. This includes preserving important pieces of San Diego's history. Here are some determining factors:

(1) A property's integrity of location, design, setting, materials, workmanship, feeling, & association.

(2) A building that is an excellent example of a style, period, or method of construction.

(3) A site where a major historical event occurred, or an important person lived or worked.

(4) A structure that represents a turning point in architectural design, planning, or technology.

(5) A site that has yielded, or is likely to yield, important historical info

1. effects of preservation—preservation efforts stabilize neighborhoods and promote cultural tourism as well as offer a wide range of other benefits
 - a. protects the unique history, architecture, or character of a community
 - b. provides the “competitive edge” of place differentiation and community livability
 - c. enhances quality of life
 - d. provides a sense of neighborhood and community pride
 - e. stabilizes or increases property values
 - f. maintains or enhances tax revenue credits
 - g. provides housing and jobs
 - h. is an incremental economic development strategy
 - i. nourishes cultural organizations, non-profits, and entrepreneurs
 - j. generates heritage tourism
 - k. attracts new residents
 - l. is environmentally responsible
 - m. reduces construction debris in landfills
 - n. uses existing infrastructure
 - o. reduces air pollution congestion
 - p. discourages sprawl
 - q. conserves farmland, open space, and endangered habitat
 - r. reduces need for additional roads, sewers, utilities in outlying areas
 - s. est. strong community ties

- t. enhances community problem solving and consensus making ability
- u. strengthens communication between neighborhoods and city hall
- v. provides a sense of time and place
- w. stabilizes neighborhoods
- x. promotes “Business Improvement Districts” or “Main Street Programs” that provide resources for marketing and promotion, trash collection, graffiti removal, and increased public security
- y. increases neighborhood population diversity-ethnicity, occupations, age, income
- z. provides long-term assurance for property owners, lenders, and investors that inappropriate, out of scale buildings will not be built in historic district
- a. increase the composite values of the sum of ALL properties within district
- b. promotes active community participation

2. property value

examples...need Indy, IN website

Lockerbie Square in Indianapolis, Indiana: 1974 boarded and dilapidated houses and unsightly vacant lots dominated the area around the preserved museum home of James Whitcomb Riley. Today, Lockerbie is a charming restored neighborhood and a highly desirable downtown address where property owners must receive prior approval from the Indianapolis Historic Preservation Commission for exterior rehabilitation, new construction, and demolition. Virtually every house has been restored, and nearly every vacant lot filled by a new home.

historic districts were chosen which have been in place long enough for the impact on property values to be measurable; these districts reveal that historic districts in IN not only provide valuable protection for each community’s historical resources but protect and enhance individuals’ financial resources as well.

Anderson, IN– the values of properties in the study areas steadily appreciated after the creation of historic districts.

Elkhart, IN– the rate of appreciation of properties in the historic district, a particularly depressed area, mirrored the rate of appreciation of the entire Elkhart market.

Evansville, IN- the appreciation of properties within the local historic district outpaced both the surrounding historic properties not included in the local district and the overall Evansville market.

Indy, IN- the property values in the local historic district increased at a rate consistent with the metropolitan Indy

overall market and exceeded the rate of both, the adjacent and highly similar neighborhood and the larger area of Indy within which it sits.

Vincennes, IN- while the amount of appreciation over the 15 year period was modest for both commercial and residential properties in the downtown historic district maintained a pattern of appreciation similar to both the rest of the commercial properties and the overall Vincennes real estate market.

Downtowns traditionally have served 3 important economic roles in a community. 1) as a geographically defined, multifunctional setting for a variety of economic activities; 2) as an informal incubator for new

businesses which need both affordable space and the interaction with a number of other types of activities; 3) as the permanent home of institutions and long-term businesses.

Property values rise with local historic district designation, equaling if not outpacing similar undesignated areas and often the performance of the city as a whole; and investment often takes place when a neighborhood's assets are protected.

Values of homes in historic areas in Memphis, Tenn., rose 14% to 23% higher than those in non-historic areas, according to a 2005 study by researchers at Penn State and Rutgers Universities. A similar study of homes in Texas found historic designation was associated with value increases of between 5% & 20% over similar non-historic neighborhoods.

- D. San Diego Preservation Worthy
 - 1. Architects Influential to San Diego
 - a. their styles, known/existing structures, locations, pictures
 - 2. Architectural Styles of San Diego
 - a. Style vs. Period

III. Getting Started - Initial Research

A. Professional Options

The choice between doing it yourself and hiring a professional involves time, money, interests, and skills. The more work you hire others to undertake, the more time you will save.

1. Architect

Architects are trained in materials and methods of construction, building design, code compliance, and architectural historians are usually qualified to perform services related to the adaptive use or rehabilitation of older buildings...The use of an architect who has specialized education and experience in historic preservation is recommended for buildings that have substantial historical significance and therefore require more skilled preservation, accurate restoration, or authentic reconstruction. Historical architects are familiar with the historic review process and tax credit procedures. – AIA Guide to HP

* Great Reference: [How to Work With an Architect](#) By Gerald Lee Morosco, AIA

Select one familiar with historic buildings; architects specialize. Contact the local or state chapter of the American Institute of Architects (AIA). The AIA can provide a list of firms that have indicated their interest and abilities in restoration or rehabilitation work. Architects can provide a number of services. They can inspect the house to determine existing conditions of materials and finishes. They can develop the architectural program for the house to determine the best uses for the existing rooms and if an addition is necessary. Architects can also provide conceptual designs, design development drawings, preliminary cost estimates, and contract documents. Architects can assist a homeowner to obtain and review bids from contractors, subcontractors, and craftspeople to undertake the construction. They can also develop the construction schedule and budget and oversee the work as it is being done to ensure it is consistent with the contract documents; can provide historical research and complete local, state, and National Register nomination forms. An architect will usually charge between 10-15% of the construction value of

a rest oration or rehabilitation project for his or her services. Architects can also provide standard contracts between the homeowner and contractors, subcontractors, craftspeople, and others involved in the project.

2. Architectural Historian/Historical Researcher

A historical researcher typically provides the homeowner with a written report detailing the history and architecture of the house, along with biographical sketches of former owners or inhabitants, particularly if they were important figures. A researcher traces the development of a house over time, focusing on important periods or dates to consider in its restoration or rehab. Researchers can also complete nomination forms to list properties in the National or state register or local list of historic buildings.

3. Archaeologist

Archaeological research- investigates below-ground project area, specifically on historically important sites to recover, protect, and evaluate artifacts and earlier periods of occupation and use

4. Landscape Architect/Designer or Historic Landscaper

Able to analyze the design and condition of an existing landscape, design one that is appropriate to your house, and prepare drawings and specifications for its restoration or rehabilitation. Can also help to obtain construction bids from landscape contractors and oversee the work as it is being done. Some are qualified to conduct research into the history and development of the landscape. Select a landscape architect or designer who is familiar with historic landscapes as part of a rehabilitation or restoration project. Often names of qualified landscape architects and designers can be obtained from the state chapter of the American Society of Landscape Architects (ASLA) as well as from the SHPO.

Landscape analysis- surveys existing conditions and historic significance of landscape design, features, and other site considerations

a. Creating A Historic Landscape: Why, Know How, & Resources

The homeowner should choose those most appropriate to the history and architecture of the house. Finding a correct and compatible garden plan can be an appealing challenge. There have been many variations in the styles of landscaping and gardens.

-18th Century usually was rigid and compartmentalized, complementing the formal, symmetrical house designs of that period. The landscape commonly was outlined by fences into functional areas such as the barnyard, laundry yard, vegetable garden and orchard. For the average family the only ornamental garden was the front dooryard containing shrubs and perennial and annual flowers. Shrubs were not planted along the foundation because it was commonly thought they promoted "bad air" and harbored snakes and insects. Herb gardens were included in the landscape, usually near the house, for cooking and medicinal purposes.

In 1841 Andrew Jackson Downing published "A Treatise on the Theory & Practice of Landscape Gardening," considered one of the most influential landscape design books ever written in the U.S. As house styles became asymmetrical and less formal with

the advent of the Gothic Revival and other revival styles, the landscape followed suit in a romantic and natural fashion.

-19th Century, homeowners became more attuned to the appearance of their homes and gardens because of an increase in books and journals on the subject, the rise of the Victorian interest in home “improvement,” and increasing prosperity. Specimen plants and flower carpet beds of elaborate designs and shapes became popular along with gazebos and cast iron garden furniture. Closely trimmed lawns came into fashion in the 1870’s with the introduction of the lawnmower.

Books guiding the Victorian-era homeowner in architecture and landscape became popular, such as “The Art of Beautifying Suburban Home Grounds,” by Frank J. Scott.

Towards the end of the century, some architectural styles, such as the Craftsman style, drew people closer to nature through the design of the house. Architectural elements such as sleeping porches, terraces, and pergolas began to appear as an integral part of the landscape. Other new approaches includes the practice of planting around house foundations. An owner should always approach restoration or rehab of the grounds around the house systematically. Take stock of what is currently growing on the site but also research the types of plantings used for the period of your house and the designs the followed in later years. Remnants of the original or early landscapes may still be visible, providing a base to work from. Old photographs of your home or other houses from the period are useful guides as are diaries and letters.

- b. In addition, the following resources should be helpful:
 - “Landscapes and Gardens for Historic Buildings,” by Rudy J. Favretti & Joy Putman Favretti
 - “The Garden, An Illustrated History,” by Julia Berall
 - “A History of Gardens,” by Christopher Thacker
 - “Early American Gardens: For Meate and Medicine,” by Ann Leighton
 - “American Landscape Architecture: Designers and Places,” published by Preservation Press
 - “Theme Gardens.” Barbara Damrosh. Workman Publishing, New York. 1982. How to plant 16 different gardens. Themes shown include Victorian, Shakespearian, and Colonial.Other books on specific landscape architects such as Downing, Frederick Law Olmsted, Beatrix Farrand and Calvert Vaux can be extremely useful.
5. Engineer- prepare preliminary design documents for structural, mechanical, electrical, and site development
 - Engineering investigation- structural, mechanical, electrical, and civil engineering surveys and analysis of the property; architectural base drawings are usually used to evaluate and map the various building or site systems
 - a. Structural surveys determine deficiencies due to settlement, deflection of beams, seismic inadequacy, or cuts through structural members for mechanical pipes and ducts

6. Interior Designer
An interior designer specializes in interior finishes, including wall, floor, and ceiling surfaces, fixtures such as lighting, kitchen, and bathroom, and furnishings. It is important to work with a designer who is familiar with historic homes.
7. General Contractor
A general contractor provides the construction services required to actually restore or rehabilitate your house. They also typically obtain building and other permits required by the local government. The National Association of Home Builders (NAHB) can provide you with a list of general contractors who have listed their expertise in residential remodeling. Many general contractors use standard contract forms published by the AIA. General contractors must be licensed by the state and are required to be bonded and insured.
 - a. One indication of his thinking and intentions is the price he quotes. If it's dirt cheap, look out. By far the majority of contractors who quote a reasonable price will do what they say they will, and will be glad to give you references. Keep in mind you are working in a subjective area, and what former customers may say about him can be slanted pro or con for myriad reasons not remotely related to his work. Other indications you can glean from talking with him relate to the way he operates. For example, does he have a regular crew, or does he pick up men wherever he can find them for each job? Will he be on the scene himself, and for how long? An established contractor who works alone or with the same men is your best bet. If he sends someone else, he should be on hand at the start, but he won't have to call back very often to check on anyone who works regularly for him. If you still aren't sure, contract a part of the job and see what happens. If the workmen show up on schedule and you see the same ones each day you're probably OK. If they don't come when they say they will, or if you keep seeing different faces, you'd best watch things closely. Likely you are being used for fill-in work by a large operator, or you have a contractor who is picking up painters as he can. Another indicator relates to the respect and care these people exhibit regarding you and your home. Do they track dirt all over? What effort is made to keep the job as neat as possible? Do they sweep up? Carry empty cans to the trash? These things are often good clues to the attitude and care being taken in the work being done. One other point: Don't be overly influenced by membership in organizations with high sounding names such as something like the "American Institute of Painting Decorators or similar sounding names. Like all or certainly most all, other professional and trade associations of our times, such organizations are largely self-serving.
8. Subcontractors
Subcontractors provide specialized building trades or services. Most subcontractors must be licensed and are required to be bonded and carry insurance.
9. Craftspeople

Craftspeople provide specific crafts or services not typically used in new construction, such as repairing or installing stained glass or applying gold leaf to surfaces. Obtain lists of professionals from your SHPO and appropriate professional or trade associations. Remember the one with the lowest fee is not necessarily the best one to undertake the restoration or rehabilitation of your home.

B. Finding Professionals with Historical Experience

1. SOHO Resource Directory
2. people to contact

Finding a qualified person to assist with the restoration, rehabilitation, and/or maintenance of an old or historic home can be a significant problem for the homeowner. Our suggestions are:

- 1) Ask your local or state historic society, preservation organization, municipal historical or landmarks commission or the staff of local historic house museums who they use for needed work on their old houses.
- 2) Talk to owners of old houses in your area and ask for recommendations on crafts people they have used.
- 3) Local hardware stores can sometimes provide names and telephone numbers of reliable workers and contractors.
- 4) Your city or county planning and development agencies may be good sources. Many such agencies have a planner who is responsible for historic preservation and could help with suggestions of qualified craftspeople.
- 5) Inquire at schools of architecture or historic-preservation planning.
- 6) Ask craftspeople whose work you trust about others who are dependable and knowledgeable. Many craftspeople work together on jobs and can recommend others who are experienced with old houses.
- 7) Other possible sources of information on craftspeople might be museum curators and historians, antique dealers, appraisers and restorers, architectural salvage dealers, architectural and preservation publishers, and suppliers of wallpaper and authentic hardware and lighting fixtures.

When you think you have found an appropriate old-house craftsperson:

-interview him/her in person by asking of: experience, references, explanation of how job will be done, how much of original will be kept, of replacements what material and how, estimate.

After the interview ask yourself if this person makes reasonable suggestions about the work. Many times it is easy to detect whether a contractor or craftsperson really knows what s/he is talking about, especially if you are somewhat knowledgeable yourself. If you have any doubts, do not jump into an agreement. Interview other prospects and talk it over with others who are experienced in hiring craftspeople.

Try to obtain at least 2-3 estimates before making a final decision.

If possible, try to make arrangements to see work that the person has already done for another homeowner.

Always get a written contract that thoroughly documents all aspects and costs of the work to be done.

Did the professional listen to the owner's ideas and discuss how they could be incorporated into the design?

Did the professional listen to the owner's ideas and explain why they should not be incorporated into the design?

Was the design sensitive to the historic and architectural character of the house?

C. To Be Researched/Obtained in Prior To...

1. Obtained

a. codes

Code profile- identifies all applicable codes and regulations and describes how the codes apply to the building and site; includes recommendations for life safety, access for people w/disability, regulatory compliance.

b. permits/approval

Approval- assist in obtaining approvals from authorities having jurisdiction over the project including public bodies such as local planning and zoning boards, historic landmark and historic district review boards, and the state historic preservation office.

A building permit is required for most work that is more than minor repair. Building permits are issued by the municipal or county building permit department or in some jurisdictions, by the fire marshal.

HRB-codes, permits, approval- Are there easements, overlay zones, or local ordinances governing alterations to property?

Depending on the current/anticipated use, how does the Americans with Disabilities Act, a federal civil rights law, apply?

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

Is local historic commission review required? YES

Section 106- a regulatory process which governs how the federal government spends its money on projects impacting historic resources.

Test: Is the physical resource that you are looking at developing eligible for or listed in the National Register of Historic Places? If it is eligible for listing or listed in the National Register & you are using federal funding in your mix of funding sources, then you need to be aware of the 106 process. The 106 process is advisory, but like our CEQA, it does have a series of steps to it to insure that your project will not significantly adversely affect that resource and that you are not going to do anything to it that will destroy its historic character.

If you are doing environmental review under the CEQA, you can parallel these processes. The report that you write and the forms that you fill out are quite similar.

What does Section 106 mean? Basically, you need to run your project by the State Office of Historic Preservation, so you prepare a report that assesses your project in terms of whether or not there is any impact on a historic structure. Keeping the structure as part of your project is usually the mitigation that they would like to talk about. The State Office then confers with

the Advisory Council on Historic Preservation, makes its recommendation, and sends its recommendation in the form of a negotiating statement called a memorandum of agreement back to the local agency. The local agency will sign this memorandum of agreement with the State Office. Under those rules and regulations that the funds are released. The funding department should know what the regulations are, what the guidelines for reports are, etc. You need not be part of a government agency to comment on the Advisory Council actions; the process is intended to be a public participation process.

2. Researched

Compiling the history of your house from the time it was built to the present will help you determine what parts of the structure are original and what parts are alterations or additions. By documenting the chronology of the house, you can decide if a particular architectural or historical period is important and should be taken into account during the rehab or restoration. Research will show if your house was associated with important local, regional, or even national events or figures. Research will also place your house within the development of your community as well as identify its relationship to regional building types and styles. The history of your house will give you the information needed to determine if it should be listed in the local list of historic buildings or in the state or National Register of Historic Places. There are two primary sources of information on the history of your old house. The first is the house itself. The second is written, printed, or graphic documentation.

a. Gathering Clues from Your Historic House

Every house contains clues to its original design and alterations. The clues may be hidden under modern finishes or in crawl spaces and attics. Does the exterior of the house have one or more styles of architecture? If so, it may suggest that certain parts were added or that they were remodeled.

Does the interior have one or more styles of architecture? If more than one style is present and corresponding styles are found on the exterior, it strongly suggests the presence of an addition. If different styles can be seen on the interior, but not on the exterior, it suggests that some of the rooms were remodeled.

Are the exterior walls of different materials? Unless the house is a Queen Anne or other style that typically used different materials on the exterior, a change of materials, particularly at a wing or setback, suggests an addition.

If the exterior walls are of the same materials is it exactly the same?

Does the roof shape and material appear to belong to the house, or does it look awkward?

Is the placement and size of doors, windows, and their surrounds consistent with the style of the house?

Is the floor plan consistent with the style of the house?

Are interior walls of uniform thickness, or do they show bulges or depressions? The latter may indicate a blocked-up door or

opening. Are the floor boards similar or different in width? Do they change direction within a room? Differences in the width or direction of floor boards may indicate that a wall has been removed or an addition constructed.

Are the ceilings lower in some rooms or parts of rooms on the same floor? May indicate that a wall was removed, mechanical systems were added, or an addition was constructed.

Are rafters, joists, and beams in the basement and attic consistent in size, direction, and spacing? If changes are confined to one portion of the house, it may indicate an addition. Changes in structural members may also indicate that part of the house was rebuilt.

If you look under electrical switch and receptacle plates or behind molding and trim, do you find pieces of old wallpaper or paint? This is evidence of the room's finishes at some point in its history. Is the interior trim around windows, doors, baseboards, and other moldings consistent or does it change from room to room, particularly on the same floor?

Clues may also be found by examining the yard and landscaping. Geometric depressions in the ground or patterned changes in grass color may give indications. If your neighbor's walls and fences are exactly the same as yours, it may indicate that a portion of your property was sold for development, particularly if your neighbors' houses were built later.

b. **Gathering Clues from Documents:**

pictures/structure visual- What was the original configuration of the building? What are the architectural changes that have been made over time during successive occupancies? These changes may or may not be an integral part of the historic character and should be evaluated very carefully prior to work.

→ additions such as a porch, wing, or upper story

→ changes to surfaces and finishes

→ 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

Deeds- provide information about who owned the house and may indicate the date of its construction

Property Abstracts- give information about the sequence of ownership. The seller must provide a copy of the property abstract when you purchase the house.

Tax Records- can provide clues about when the house was originally built and when additions were constructed. Look for an increase in assessed value that does not coincide with a community-wide reassessment or increase.

Building Permits- issued for the construction of a house, major alterations or additions

Birth, Marriage, & Death Certificates- usually have street addresses and can be helpful in tracing who lived in the house

Wills & Probate Records- give information about who owned the property as well as the value of the house and land, and sometimes an inventory of furnishings. Inventories can reveal particularly important clues about how the house was furnished at a particular period.

Insurance Records- provide information about the house, its property and contents

Family Papers, Letters & Scrapbooks- make the history come alive

Newspapers- can provide a wealth of information about the previous owners of your house as well as its history. Look for marriage and birth announcements and obituaries as well as articles about the owners. The classified section of the paper may contain advertisements for the sale of your house and articles may cover its construction, report on a fire or natural disaster that affected your house or provide documentation of important events there.

City Directories- are annual listings of occupants of buildings published for many communities. Organized by street address, city directories can be helpful in determining names of former owners and tenants of your house. They can also be helpful in determining its date of construction, since the first time your house appears in the directory is probably the year it was built.

Prints, Lithographs & Postcards- of your town or street may show your house.

Planning & other City/County Maps- may show the outline of your house or former buildings on your property.

Insurance Maps- have been issued since the 1860's by companies such as the Sanborn Map Company. They show the outline of buildings and provide information on the number of stories and major exterior materials.

Sanborne maps- Each Sanborn map page depicts an area of about six blocks, giving the location of buildings and some structural information. Sanborn maps were updated periodically after their initial printings. The updates are pasted over the printed page and indicate a new structure, alteration, or change of use. This is also the easiest place to find a building's pre-1911 address. Make sure that you are looking at the right building, and note its orientation and its distance from the nearest cross streets.

Plat Books- show property boundary lines and are usually found in city hall or the county courthouse.

Aerial Photographs- have been commissioned by many cities and towns since the 1920s; will show roofs, landscaping features, driveways and secondary buildings

Bird's Eye Drawings- of cities and towns were very popular in the second half of the 19th century.

Atlases- began to appear for many counties by the mid-19th century. They depict roads, streams, fields, RR, cemeteries, and often individual buildings.

Architectural Plans- are the most detailed graphic documents you may be able to find.

Builders' Guides and Stock Plan Books- were often used by builders to construct houses, particularly since the late 19th century. Guides and plan books may not show your exact house, the builder may have made modifications to fit the site or the budget of the original owners.

3. Getting Started With Research & Tips for Designation

HRB web address & explanation

- a. reference "A Field Guide to American Homes" by Virginia & Lee McAlester to determine the style of structure
- b. Do a title search at the San Diego County Recorder's Office, hire a mortgage company, or architectural historian to do this search for you. Once the original owner is found, check for a Notice of Completion to determine the builder and/or architect. **A list of owners and Notice of Completion should be included in your report.**
- c. To further document or establish the date of construction call the SD City Water Department records archives at (619)527-7482 and request information regarding the water & sewer hook-up at your address. You may need to provide them with the assessor's parcel number, the subdivision, block & lot. IF they find documents relating to your property, you can get a free copy at 2797 Caminito Chollas, SD, CA 92105. **Include this data in your report.**
- d. Check San Diego City & County Directories, 1872-1980, at the San Diego Public Library California Room and at the San Diego Historical Society to learn about the people associated with your house: the owners and/or occupants (make note of their professions), and the architect & builder. **A chronological list starting with earliest owners/occupants associated with your house and their professions should be included in your report.**
- e. When you know the names of owners, occupants, architect, builder, check the San Diego Historical Society biographical files and computerized index for further information; search for information in local biographical histories compiled by Smythe, Black, McGrew, Heilbron, and Who's Who In San Diego (1936); also check the San Diego Union index at the San Diego Public Library California Room for references. **Mount important biographies and obituaries, etc. on separate pages with sources identified for inclusion in your report.**
- f. If you know approximately when your house was built but don't know the architect or builder, search through the San Diego Union on microfilm during that time period, which can be obtained at the San Diego Public Library Newspaper Room. Development sections are included in the Sunday editions of the San Diego Union commencing in the 1920s. If your house was built after 1927 you can search through the Southwest Builder & Contractor, which can be obtained in the periodical section on the first floor of the downtown library. Also the San Diego Daily

Transcript lists building permits and notices of completion. **Include all articles you find relating to your house in your report.**

- g. Check the historical photograph collection at the San Diego Historical Society to locate any photo documentation of your house. You may order pertinent photographs for about \$20 or obtain a Xerox copy for \$1. Check under owners' names, neighborhoods, architectural files, family scrapbooks, or aerial photographs. **All historic photographs should be included in your report with credit given to the San Diego Historical Society.**
 - h. If your house was designated by a prominent local architect, check the architectural drawing files at the San Diego Historical Society; you may purchase copies of the drawings. Also obtain biographical information about the architect in San Diego Architects, 1868-1930, compiled by U.S.D. and available at the San Diego Historical Society. **You may include a copy of the biographical information in your report with credit given to U.S.D. as well as architectural drawings of your house with credit given to the San Diego Historical Society.**
 - i. Check the Sanborn Fire Maps for your community/city. These date back to the late 1800s and show your house with additions, etc. over time. The Sanborn Fire Maps on microfilm are available in the Newspaper Room at the San Diego Public Library (the librarian has an index) and at the San Diego Historical Society. **Include fire map copies in your report.**
 - j. Conduct oral interviews of previous owners and architect/builder, if possible, to obtain further information about your house. The San Diego Historical Society also has collected numerous oral interviews of prominent San Diegans.
 - k. Obtain a copy of the Residential Building Record for your home from the San Diego County Assessor's Office 5473 Kearny Villa Road, 3rd floor. The cost is \$2 per page (back to back), and this shows a configuration of your house with changes over time, as well as assessor notations. **You may want to include this in your historic report.**
 - l. Obtain the DPR forms (Primary Record & Building Structure & Object forms) from the secretary to the San Diego Historical Resources Board, 619-533-6307 & web address
- D. Research Resources (w/link)
U. S. Censuses

National Park Service Brief 17: "Architectural Character Identifying the Visual Aspects of Historic Buildings as an Aid to Preserving Their Character"
<http://www.cr.nps.gov/hps/tps/briefs/brief17.htm>

National Register Bulletin 15: "How to Evaluate the Integrity of a Property"
http://www.cr.nps.gov/nr/publications/bulletins/nrb15/nrb15_8.htm

National Register Bulletin 15: "How to Evaluate a Property within its Historic Context"

http://www.cr.nps.gov/nr/publications/bulletins/nrb15/nrb15_5.htm

HRB's designation criteria, review "Guidelines for the Application of HRB Criteria" <http://www.sandiego.gov/planning/programs/historical/index.shtml>

"California Office of HP Technical Assistance Series #1: California Environment Quality Act (CEQA) & Historical Resources"
<http://ohp.parks.ca.gov/pages/1054/files/ts01ca.pdf>

Department of Parks & Recreation DPR form at
www.ohp.parks.ca.gov/default.asp?page_id=1069

Reference: A Field Guide to American Houses by Virginia & Lee McAlester

E. Where to Go/What You'll Find:

1. San Diego County Assessor/Recorders Office
1600 Pacific Highway, Room 13
San Diego, CA 92101
619-527-7482
*do a title search or hire a mortgage company or architectural historian to do it
Residential Building Record- configuration of house w/changes over time, assessor notations
Notice of Completion- for builder/architect
Deed Information- chain of title
2. City of San Diego Water Operations, Maps & Records
2797 Caminito Chollas
San Diego, CA 92105
619-527-7482
Water & Sewer Connection Records- dates of hookups
3. San Diego Historical Society
Casa de Balboa, lower level
1649 El Prado, Balboa Park
619-232-6203
*look under owner's name, neighborhood, architect files, family scrapbooks, aerial photo's, architectural drawings by local architects
*bio information of architects in San Diego Architects (1868-1930) by U.S.D.
Historical Photographs
Biographical Information- owners/professions
Historical Maps- Sanborn maps
oral interviews of prominent San Diegans
San Diego directories
local bio histories compiled by Smythe, Black, McGrew, Heilbron, & who's who is San Diego ('36)
4. South Coast Information Center
4283 El Cajon Boulevard, St. 250
San Diego, CA 92105

- 619-594-5682 (call for appt.)
 Previous Surveys/Records of the Property
 Previous Surveys/Records of Surrounding Properties
5. San Diego Public Library
 Central Library, California Room
 820 E Street
 San Diego, CA 92101-6478
 619-236-5800
San Diego Directories- (1872-1980)- the directories can establish date & duration of residency
Sanborn Fire Insurance Maps- date to late 1800's, show additions over time; microfilm in newspaper room
Historical Newspapers & Clippings
 Rare Books
Union Tribune- index for references; 'Development' Section on Sundays started in 1920's; built after 1927, search SW Builder & Contractor located in periodical section (1st floor)
 San Diego Daily Transcript lists building permits & notice of completion
 6. City of San Diego Development Services Dept.
 1222 First Avenue, 2nd Floor, Records Section
 San Diego, CA 92101
 619-446-5200
 Building/Construction Permit Records- except in areas not annexed until later, every building from late 1905 on should have a City Building Permit. Permits will also document alterations to earlier buildings, and give additional owners' names.
 7. City of San Diego Planning Department
 202 C. Street, 4th Floor
 San Diego, CA 92101
 619-235-5224 (call for appointment)
 inventory forms from previous surveys
 Historical Site Designation Files
 info on established Masters
 8. Various University Libraries
 bio info of architects in San Diego architects (1868-1930) by U.S.D.
 newspaper articles & images
 magazines
 scholarly research
 special collections
 9. HRB
 Civic Center, Floor 4
 San Diego, CA 92xxx
 DPR forms for Primary Record & Building, Structure & Object

IV. Understanding/Using Surveys
 "Statewide Surveys are prepared by your State Historic Preservation Office (SHPO) and may list properties and districts as local landmarks. States also recommend listings for the National Register."

A. Potential Historical Significance: Significance is determined by a comparative analysis of similar properties within a related context, which in turn are developed through professionally prepared Context Statements that accompany the survey and provide the framework for decision-making.

1. What is a Survey/Context Statement

“Surveys also enable property owners to understand the relative significance of their buildings and the kind of professional assistance that will be needed to accomplish the proper treatment.” – AIA Guide to HP

A Historical Survey is an inventory of properties that are at least 45 years old and retain reasonable architectural integrity; often used as planning tools; though often conducted by volunteers, they are best prepared by professional individuals w/standards from the National Park Service.

A Context Statement provides the history of the survey area, organized into significant themes and related property types. Property types are identified and analyzed for expected frequency, location, and integrity; in this way, common, ever-present and representative property types can be identified, and interesting rare or exceptional examples are likewise noted. Rare properties in poor condition could attain exceptional status, in contrast to common properties in poor condition that would not be considered significant.

2. What does it mean to my property to be included in a historical survey?

-most likely means your property is 45 years old or older and has good architectural integrity, could indicate that your property is 1)potentially eligible for individual designation, or 2)is a contributor to a potential historical district, 3) is not historically significant.

-if property is id'd as potentially historic, further research would need to be done to determine if it meets HRB criteria for designation, which is only nec. to designate; to demolish/remodel a historical study would have to be provided prior to getting a permit

-requirements for historical studies are located in the Land Development Manual Historic Resources Regulations

a. Reconnaissance Level Survey

-broad-brush look at a study area to indicate what is potentially historical, not historical, and what needs additional study to make a determination of historical significance. Typically, properties are mapped, photographed, and documented on standardized state forms; documentation includes info available through public records; includes original owner, architect, builder and date of construction, building condition noted, including alterations/additions w/dates; description records style, materials, and method of construction; also evaluated for potential historical significance based upon condition and architectural merit.

-this type of survey is a sorting tool; separates properties with no potential for historical significance from those that merit closer scrutiny; baseline data for future research; not nec. reveal info of

persons/events related to site; most useful for quickly analyzing opportunities/constraints for future development as part of a larger planning effort

b. Intensive Survey

-starts w/info provided by Reconnaissance survey, and adds more property-specific historical data; Chain of Title indicates persons involved w/site as well as events, patterns of events for San Diego's history as provided in context statement; also identifies the architect, builder/contractor as significant practitioners and assesses how their body of work is represented by the subject property

3. San Diego Surveys...regions, status, & neighborhood org. to contact

a. La Jolla...Status- findings incomplete and indicate 11 potential districts based upon this survey

Mid City Survey...Status- 13 potential districts based upon this survey. Shirley Ann Place & Burlingame were adopted, Bankers Hill, Kensington, Marston Hills, South Park, etc. are inactive

North Park...Status- preliminary findings one potential additional district based upon this survey

Uptown...Status- survey results have not been reviewed to determine the possible districts

Warehouse Survey (East Village)...Status- one district in process by city staff

African American Thematic Study...Status- one district identified and the Black Historic Society has conducted search

V. Jargon to Understand Before Getting Dirty

A. Sec. of Interior Standards (w/link)

The Standards are neither technical nor prescriptive, but are intended to promote responsible preservation practices that help protect our Nation's irreplaceable cultural resources. They cannot be used to make essential decisions about which features should be saved/changed. Once a treatment is selected, the Standards provide philosophical consistency to the work.

1. 4 Treatment Approaches:

preservation- places a high premium on the retention of all historic fabric through conservation, maintenance, and repair; reflects building's continuum over time, through successive occupancies, and the respectful changes & alterations that are made.

rehabilitation- emphasizes the retention and repair of all historic materials, but more latitude is provided for replacement b/c it is assumed that property is more deteriorated prior to work; acknowledges the need to alter or add to a historic building to meet continuing or changing uses while retaining the building's historic character.

restoration- focuses on the retention of materials from the most significant time in a property's history, while permitting the removal of materials from other periods.

reconstruction- establishes limited opportunities to re-create a non-surviving site, landscape, building, structure, or object in all new materials.

The Secretary of the Interior's Standards for Rehabilitation are ten basic principles created to help preserve the distinctive character of a historic building and its site, while allowing for reasonable change to meet new needs. The standards apply to historic buildings of all periods, styles, types, materials, and sizes. They apply to both the interior and exterior of historic buildings; as well as encompass related landscape features, the building's site, and environments as well as attached, adjacent, or related new construction.

- projects must meet the Standards, by NPS, to qualify as "certified rehabilitation" eligible for the 20% rehab tax credit

2. The Standards are applied to projects in a reasonable manner, taking into consideration economic and technical feasibility.
 - 1) A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
 - 2) The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
 - 3) Each property shall be recognized as a physical record of its time, place and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings shall not be undertaken.
 - 4) Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
 - 5) Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a historic property shall be preserved.
 - 6) Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
 - 7) Chemical or physical treatments that cause damage to historic materials shall not be used. The surface cleaning of structures shall, if appropriate, shall be undertaken using the gentlest means possible.
 - 8) Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
 - 9) New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, scale, size, and architectural features to protect the historic integrity of the property and its environment.
 - 10) New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the

essential form and integrity of the historic property and its environment would be unimpaired.

3. how to understand/interpret Secretary of Interior's Standards "Historic Preservation Treatments: Toward a Common Language"
www.cr.nps.gov/hps/tps/common_language_article.htm

- B. Mill's Act (w/link) -Mills Act can significantly reduce property taxes (LINK), which is the statewide preservation law enacted by former State Senator Jim Mills that allows for a significant reduction in the property taxes of designated historic a 30-70% reduction in property taxes provides that property is subject to a historical property contract be valued using the rental income that could be expected from that property rather than using comparable sales to establish the assessed value. This generally results in a much lower assessment if the property has been recently purchased.

Purpose of the Mills Act Program- Economic incentives foster the preservation of residential neighborhoods and the revitalization of downtown commercial districts. The Mills Act is the single most important economic incentive program in CA for the restoration and preservation of qualified historic buildings by private property owners.

Mills Act property tax reduction for locally designated sites in certain areas of the City of SD. Contracts entered into based on the Mills Act state law allow a different method of property tax valuation to be prepared by the County Tax Assessor.

1. benefits to owners:
Owners of historic buildings may qualify for property tax relief if they pledge to rehabilitate and maintain the historical and architectural character of their properties for at least a ten-year period. It is especially beneficial for recent buyers of historic properties and for current owners of historic buildings who have made major improvements to their properties.
to qualify:
it must meet qualifying criteria such as significant architecture, association w/ historically significant event/person, location in historic district
contract term:
minimum of ten years; contracts are automatically renewed each year and are transferred to new owners when the property is sold; the contract is binding to all owners during the contract period.
who qualifies:
City of SD, City of Chula Vista, City of Coronado, City of Escondido, City of La Mesa, and the City of National City have enacted ordinances to grant Mills Act exclusion. County of SD also passed an ordinance for historical properties in the unincorporated areas of the county.
savings to expect:
owners can expect 20%-70% savings on taxes; under state law the lesser of 1) the current market value, 2) the proposition 13 value, or 3) the restricted value based on the rents will be used to calculate your property taxes.

Mills Act participants may realize substantial property tax savings of between 40%-60% each year for newly improved or purchased older properties because valuations of Mills Act properties are determined by the income Approach to Value rather than by the standard Market Approach to Value. The income approach, divided by a capitalization rate, determines the assessed value of the property. In general, the income of an owner-occupied property is based on comparable rents for similar properties in the area, while the income amount on a commercial property is based on actual rent received. Since rental values vary from area to area, actual property savings vary from county to county. Additionally, as County Assessors are required to assess all properties annually, Mills Act properties may realize slight increases in property taxes each year.

2. binding restrictions:

once designated, it is subject to the rules/regulations of Office of HP, Sec. Int. and Historic Building Code. Owner must protect, maintain, rehab the property into perpetuity. Periodic inspections by city or county officials ensure proper maintenance of the property. Local authorities by impose penalties for breach of contract or failure to protect the historic property.

Once a property is designated as a Historical Property, it must be permanently maintained as a historical site.

a. interpretive link

b. ordinances/phone numbers

San Diego- Historical Resources Board-619-235-5224

Chula Vista- Planning Department-619-691-5101

Coronado- Community Development Dep.-619-522-7326

Escondido-Planning Department- 760-839-4553

La Mesa- Community Development- 619-667-1177

National City- Planning Dept.- 619-336-4310

County of SD-Dept. of Planning & Land Use Historical Properties- 858-694-2981/3656

- C. CA Historic Building Code (w/link)—provides regulations/standards for the rehab, preservation, restoration or relocation of historical buildings. Standards are intended to allow for restoration/change in occupancy so as to preserve the building's original or restored elements/features. Code also encourages energy conservation and a cost effective approach to preservation; provides for safety from fire, seismic forces, or other hazards, provides reasonable availability/usability by the disabled. Code provides flexibility in meeting requirements; most older buildings do not meet today's building code standards, and may have to conform to new ones when doing major renovations/repair if not historically designated. Designated building would be exempt from some current building code requirements, and/or would be able to meet them by alternative means/methods.

www.sandiego.gov/planning/programs/historical/faq/code.shtml—link to “Requests for Alternate Materials and Methods”

1. Exceptions to Rules, Codes, etc.

California Historical Building Code—A historically designated building would be exempt from some current building code requirements and/or may be able to use alternative means/methods.

- D. CEQA (w/link)
 - 1. interpretive link
- E. Historic Structure Report (HSR)
- F. Historic Resource Board

The HRB shall advise the Mayor, City Council, City Planning Commission, Park & Recreation Board and City Manager relating to the identification, protection, retention and preservation of historical sites in the City. There are 15 two-year staggered terms and until a successor is appointed and qualified. Each member is prohibited from engaging in any activity which could result in conflict of interest and must make an annual statement of financial disclosure.

 - 1. <http://www.sandiego.gov/planning/programs/historical/faq>
- G. Maintenance Guidelines

this is of critical importance in preservation and should not be overlooked; maintenance is preservation; problems often arise because ordinary, routine stuff was deferred. Reg. maintenance, the life of a structure or resource can be measurably extended w/o loss of historic fabric. To preserve adequate planning/funding is required for all maintenance needs.

www.sandiego.gov/planning/programs/historical/benefits/inde. for link to “Minimum Maintenance Standards

“Good maintenance is invisible to most observers.”

VI. Creating a Plan

- A. Existing Conditions

Investigating the existing conditions – What parts of the structure, materials, finishes, fixtures, and mechanical and other systems are in good condition and which need to be restored, rehabilitated, repaired, or replaced? These all need to be examined. The appraiser who helped establish the sale price should have provided the seller and buyer with a report on existing conditions.

 - 1. Analysis To Do
 - Preliminary Survey- describes the property in general terms and evaluates its level of integrity, physical condition, and probable historical significance. Recommends historic preservation work plan and professional services that will be needed
 - Archival/Literature Search- locates, id’s, and assembles original drawings, historic photos, and written accounts or descriptions to aid in tracing development of structure through different periods.
 - Documentation- prepares measured drawings, collects field notes, and takes photographs that will provide a record of the property as found.
 - Conservation Analysis- investigates and monitors the structure in relation to its behavior and composition; recommends procedures for stabilizing the building, controlling the interior environment, minimizing further deterioration, and repairing damaged parts.
 - Fabric Analysis- analyzes the materials, workmanship, and equipment of the structure in relation to their physical nature, sources, and dates of construction.
 - Building chronology- traces the development of the structure through its construction periods, ownership, and uses; analysis usually takes the form of text and a series of chronological plan overlays
 - 2. Deciding Which Route to Take

choosing the most appropriate treatment for a building requires careful decision-making about a building's historical significance, as well as taking into account a number of other considerations:

→ relative importance in history: Is the building a national significant resource— rare survivor? important event?

→ physical condition: existing condition—degree of material integrity prior to work? original form survived largely intact or has it been altered over time? are alteration's important to history also?

→ proposed use: historical use or new use? special-use properties may be difficult to adapt to new use w/o major intervention

→ mandated code requirements: need to be taken into consideration, could jeopardize a building's historic character & alterations/new construction needed to meet accessibility requirements for Americans w/Disabilities Act

“How a historic property may be treated depends largely on its historical significance and surviving integrity...A property of less significance may offer greater flexibility in its use and require less stringent treatment”

– AIA Guide to Historic Preservation

B. Developing the Architectural Program

Developing the architectural program – An architectural program lists the functional requirements in a house; how each room is to be used, the relationships between rooms, the types of fixtures or equipment needed, the sizes of rooms, and other requirements necessary to make the house livable. An architectural program will help you to decide where to locate new uses.

1. Condition Survey- utilizes the record drawings and photographs; describes and maps the condition of the structure; and identifies the types, locations, and probable causes of problems

Historic Structure Report (HSR)- coordinating and assembling all of the necessary studies into a single document constitutes a comprehensive HSR report; an HSR should be a process for decision making rather than a fixed product

Architectural design- develop final design drawings for the project, including the site plans, floor plans, elevations, sections, and significant preservation details; special materials and construction techniques should also be included

C. Preparing the Design Drawings & Contract Documents

Preparing the design drawings and contract documents – The conceptual design phase, consists of preliminary plan and elevation drawings based on the architectural program and the inspection of existing conditions. The drawings indicate the uses of rooms, additions that may be required, and portions of the house that need to be restored or rehabed. The second phase is the design development. The architect will further develop one or some combination of the alternatives. The location of mechanical, electrical, and plumbing systems is determined. The design complies with local building code requirements, considers alternative methods and materials of construction, and selects materials and finishes. Outline specifications and a preliminary cost estimate are offered as well. If your house is subject to local design review or if you will be obtaining tax benefits specs are submitted to the review board. To create the contract documents, consisting of working drawings and specifications. They typically include architectural drawings showing plans, sections, and elevations; structural drawings showing methods of construction and structural systems;

and mechanical, electrical, and plumbing drawings showing the location and sizes of those systems. The contract documents are used to obtain bids from contractors.

D. Cutting Costs

Do not cut quality.

Do not use cheap or inappropriate materials.

Do not experiment.

Seek expert advice.

Do related work together.

E. Construction Sequencing/Tips

You will want to undertake exterior work, such as refinishing the siding or building the exterior shell of an addition during the summer, while interior work such as renovating the plumbing system can occur at any time of the year.

Demolition- Most restoration and rehab projects involve some demo. Typically demo work is completed before any new work is begun.

Structural Repairs or Alterations- Next repairs or alterations to structural elements are usually undertaken.

Exterior Work- Completing the exterior work next will ensure that the interior is protected from the weather.

Insulation & other Energy Efficiency Measures- Adding or upgrading existing insulation in the attic and walls is often done simultaneously with exterior restoration. Upgrading existing or adding new insulation must be done with care.

Upgrading Mechanical & other Systems- most plumbing, heating, cooling, and electrical distribution systems, such as pipes, ducts, and wires, are buried in walls, floors, and ceilings.

Completing the Interior & Site Work- Typically finishing the interior, installing the fixtures, and finishing the landscaping can occur simultaneously.

Clean Up & Final Inspection- properly disposing of construction debris

VII. 4 Treatment Approaches:

preservation- places a high premium on the retention of all historic fabric through conservation, maintenance, and repair; reflects building's continuum over time, through successive occupancies, and the respectful changes & alterations that are made.

rehabilitation- emphasizes the retention and repair of all historic materials, but more latitude is provided for replacement b/c it is assumed that property is more deteriorated prior to work; acknowledges the need to alter or add to a historic building to meet continuing or changing uses while retaining the building's historic character.

restoration- focuses on the retention of materials from the most significant time in a property's history, while permitting the removal of materials from other periods.

reconstruction- establishes limited opportunities to re-create a non-surviving site, landscape, building, structure, or object in all new materials.

A. Should You Restore or Rehab

You need to decide whether to restore or rehab the house, or restore some portions of the house while rehabilitating others. This decision will influence the finished character of the house, the cost of the project, and the amount of time the project will take. Deciding if the house should be restored or rehabbed and to what extent, involves understanding its history, architecture, and the present condition of its materials, finishes, and systems. The decision will also be

influenced by how you and your family live and the personal needs that must be accommodated. It will be influenced by whether or not the house is in a local historic district, local building codes, property insurance, and other regulatory and financial considerations. To **restore** a house means to return its interior and exterior appearance to a particular date or period. A homeowner may also decide to restore the yard and landscape to the same period. Most restorations reflect the building's history over time, and allow for modern systems and equipment. A key consideration in selecting the periods for your restoration is the quality, design, materials, and craftsmanship of the original house and the changes that have occurred over time. One factor to consider in deciding what to restore and what to remove is the intrusiveness of later alterations. Compatible interior and exterior changes or additions that appear to belong to the house, even if done in different styles and materials, should probably be retained and restored. If the changes or additions appear intrusive or are poor designs, they should probably be removed. Another factor to consider is the history of the house. To **rehabilitate** a house means to make it useful and functional for contemporary living while preserving historic and architecturally important features. The key to a quality rehabilitation is the manner in which modern technologies and living styles are accommodated in the old house. Changes should be designed to be compatible with the historic character of the house and should not be intrusive. Alterations should not destroy or cover historically or architecturally significant features or materials. If the rehab requires an addition, it should be compatible with the design of the house and landscape. The scale (its apparent size), size (its actual dimensions), and massing (its major volumes) of the addition or alteration should be similar to the original. Most compatible alterations and additions use materials, textures, and colors that are similar to those of the original building. The detailing or architectural features of the addition should be compatible with those found in the old house. A major problem in both restoration and rehab is falsifying the history of a house by designing an addition that so closely resembles the original that the two cannot be told apart.

1. Alterations

- Siding

- All too often, fine old homes are entirely encased in aluminum or vinyl siding that invariably pretends to be something it is not. These sidings are NOT maintenance-free, and synthetic siding will almost certainly destroy the architectural integrity of an old building. It may even contribute to the structure's physical deterioration. Synthetic sidings will change a building's character by hiding important design details and ornaments. In fact, the installation of such siding often requires that those details be entirely removed. Monotone siding will, for example, cover the varied textures and colors of clapboards, shingles, and decorations that are essential features of a Queen Anne style house, destroying the house's visual character. Similarly, an Italianate house loses a characteristic feature when its brackets are replaced with a vinyl fascia and soffit. Even the proportions of an early 20th century frame house can be ruined by the application of wide synthetic siding which obscures the original narrow clapboards. The design and function of window casings, drip caps, moldings, and door trim are often obstructed, and the three-dimensional appearance is destroyed, resulting in a flat

appearance. Synthetic sidings will not render a building maintenance-free. Although synthetic siding hides physical deterioration, it does not prevent and may even accelerate such trouble. Even if the original building fabric is not damaged during installation (damage is quite likely), there are other problems. Rot and insect attack may proceed unnoticed. Many sidings act as exterior vapor barriers, trapping excess water vapor which is incorrect or if the siding is subsequently damaged, actual runoff water may enter behind the siding and be trapped. Such problems are undetectable because the siding makes a visual inspection impossible. And finally artificial sidings offer no structural support, so that if continued deterioration lead to failure, the siding will buckle and separate from the building. This siding itself will lose its initial appearance. Aluminum siding is prone to dents and scratches, and its color coating can peel and fade. Solid vinyl siding is vulnerable to punctures and tears; it is sunlight-sensitive, becoming brittle and faded if not properly treated with an ultra-violet inhibitor. Most vinyl siding becomes brittle and susceptible to shattering in cold weather. Should it ever be necessary to replace a section of siding (the typical repair after temperature of impact damage), it will probably be impossible to match color and style since the industry frequently changes its product lines. Successful painting of such siding is also difficult. If there is a fire, sidings offer little or no protection. Aluminum siding can make it difficult to reach the fire's source, though it will not burn or increase heat. Vinyl siding melts, curls, and sags, even when the fire is only in a nearby structure. Vinyl siding is sometimes advertised as "self-extinguishing," which simply means that it will not burn alone. It will, however, burn in the presence of fire. According to the Federal Trade Commission, synthetic sidings have little or no insulation value. It was the FTC's contention that even when insulated aluminum siding is correctly installed, there is little or no energy savings. As a result of these charges, the insulation value claim has disappeared from advertising. Although the loss of aesthetic value is not quantifiable, it must also be included in economic considerations because the property will retain greater value when original materials are properly maintained. Also, real estate appraisers and potential buyers may be concerned that the siding is hiding problems.

B. Inspection of an Old Building/What To Look For

When setting out on an inspection, wear old clothes so that you can climb around in the cellar and attic and under the porch. Bring a flashlight, small magnet, plumb line (a string with small weight will do), a pen-knife, a marble, binoculars, pad and pencil, the list. Correlate what you see both inside and out.

1. EXTERIOR

a. ROOF- A sound, tight roof is the first line of defense against water. Binoculars can give you a good close-up view, if it's impossible to get up onto the roof.

1) ROOFING MATERIALS

a) type of roof on house (in approximate order of longevity): slate, copper, ceramic tile, tar/gravel,

asbestos tile, wood shakes, wood shingles, galvanized steel, asphalt shingles, roll roofing

- b) pitched roof: any sign of missing, broken or warped shingles or tiles?
- c) asphalt shingles: are the mineral granules getting thin? Do edges of shingles look worn?
- d) asphalt shingles: does roof look new but lumpy? new roof may have been applied directly over old shingles
- e) flat roof: any sign of bubbles, separation, or cracking in the asphalt or roofing felt? (Roofing should be flat and tight to roof; it shouldn't feel spongy underfoot.)
- f) any signs of ponding (standing water)- either actual water or water marks? (there may be structural deflection in the roof members)
- g) any sign of rusty, loose, or missing flashing around chimneys and valley? (Flashing is the weakest part of any roof. Copper is the best flashing and will show a green patina.

2) CHIMNEYS

- a) is the masonry cracked or crumbling? is the parging cracked or peeling?
- b) do the old chimney flues have a tile lining? (If not, they could be a fire hazard in conjunction with wood-burning fireplaces.)
- c) is the chimney leaning, if it is it may have to be rebuilt from the roof up

3) ROOFING STRUCTURE

- a) does the ridge or any other part of the roof sag? could be normal steeling or a result of rotted rafters or other structural problems
- b) is there badly peeling paint on the cornice, especially the underside? could be roof leak spilling water into cornice
- c) are there loose, rotted, or missing gutters?
- d) is the attic ventilated with a soffit vent, gable vent, ridge vent, or other type of vent

b. WALLS STRUCTURE

do exterior walls seem plumb? out of plumb walls can indicate serious foundation problems

sight along exterior walls, any sign of major bulges? this could signal major structural flaws

do doors and windows line up squarely in their frames?

does the siding undulate?

- 1) WATER & TERMITE DAMAGE
- a) any signs of veins of dirt on exterior walls? these are termite mud tunnels, look for them on foundation, steps, cellar walls, under porches
 - b) does wood near the ground pass the pen/knife test? check areas such as cellar window frames, sills, siding, porches, and steps. unsound wood can be caused by either termites or rot, which can be arrested by eliminating the source of moisture
 - c) is all exterior wood at least 6 to 8 inches above the ground, if not inviting target for termites and/or rot
 - d) is there any vegetation close to the house? vegetation holds moisture in wood, check behind it for rot

- 2) SIDING, TRIM & FINISHES
- a) are there many loose, cracked or missing clapboards? this is great for water and rot
 - b) are shingles thick and well nailed?
 - c) do shingles have a natural finish? natural finishes are easier to re-apply to shingles than paint
 - d) is decorative woodwork firmly attached to house and tightly caulked to prevent water penetration
 - e) is exterior paint fresh and in good condition?
 - f) if paint is not new, it is powdering and chalking to a dull, powdery surface?
 - g) is paint peeling, curling, and blistering? could mean serious water problems: either a leak or a lack of sufficient vapor barrier
 - h) are there open joints around door frames, window frames, and trim?
 - i) are joints between dissimilar materials well protected with flashing or caulk
 - j) is there mold or mildew on siding or trim, especially on north side or other shady areas? indicative of a moisture problem
 - k) has any of the original trim or siding been covered over or replaced with vinyl or aluminum siding? it may be hiding rot or other damage underneath

c. DOORS & WINDOWS

do doors and windows fit property?
is any of the wood rotted, especially sills and lower rails
are the doors and windows weather-stripped?

is the glass intact and properly glazed with glazing putty painted?
are there storm/screen windows/doors in serviceable condition?

d. FOUNDATION & MASONRY

- a) any signs of cracks in masonry walls? horizontal or hairline in mortar are usually not a problem; cracks vertically may be serious
- b) is mortar soft and crumbling? are bricks missing or loose? loose masonry is vulnerable to attack by water, having a masonry wall re-pointed with fresh mortar is expensive
- c) are there any bows or bulges apparent when sighting along walls?
- d) has masonry been painted? it will have to be repainted about every 5 years or else stripped
- e) any sign of spalling, cracking, or crumbling of stonework?
- f) is there adequate (continuous) foundation, or is the building resting on posts or masonry piers? a continuous foundation lessens the likelihood of differential settlement
- g) is ground water and downspout water properly diverted away from building with correct grading and splashblocks under leaders?

2. INTERIOR

a. CELLAR FOUNDATION

is there a dug cellar with wood sills resting solidly on a masonry foundation well above ground level? some old structures have “mud sills” and eventually have to be replaced

is mortar in foundation soft and crumbling? this could be serious if there is a sag in the structure

are there any vertical cracks in the foundation wall? have an engineer check it out

1) GENERAL CONDITION

- a) does the cellar smell damp & moldy
- b) do sills show signs of rot or termites? probe with pen-knife
- c) any sign of dampness on the underside of floors around pipes? if leaks there could be wood rot
- d) does basement show signs of periodic flooding? bad signs: rust spots, efflorescence or mildew on walls, materials stored on top of bricks to raise it above floor level
- e) any signs of sagging floors, cracked headers or beams, rotted support posts, or jury rigged props to shore up weak flooring?
- f) is there asbestos board on ceiling? identifiable by embossed pattern/texture and manufacturer's name in face of board, if there it must be removed by a licensed asbestos-removal contractor
- g) if there's only a crawlspace instead of a cellar, does it have any insulation or vapor barrier

2) HEATING PLANT

- a) was heating plant originally designed to burn coal? if so more than 30 years old, which are usually inefficient & leaky
 - b) is the fuel tank inside or out, what is its capacity? what is condition of fuel lines?
 - c) is boiler encased in asbestos jacket? are heating pipes encased in this material? asbestos may have to be removed by licensed contractor
 - d) does heating system operate satisfactorily?
 - e) is yearly heating cost reasonable for your budget?
 - f) is domestic hot water heated by boiler or separate hot-water heater? best system has the boiler heating water in the winter, and a separate water heater doing the job in summer
 - g) is capacity of hot-water heater at least 40 gallons?
 - h) are there signs of leakage, rust spots, anywhere on the tank?
 - i) is the glue in good condition?
 - j) are either the hot-water or heating systems multi-zone?
- 3) PLUMBING- check whether the water is supplied from city main, deep well, or spring; if from a well have the water tested; if spring probably necessary to drill a well
- a) is water main coming into house lead? may have to be replaced
 - b) is the main shutoff valve functional?
 - c) type of distribution piping, best to worst: copper, brass, galvanized iron, lead which should be eliminated (use a magnet to test for iron, detect lead by scratching pipe with pen knife to see if soft and silvery, if pipes are brass or copper, look for bluish-green stains which mean there is not much life left in them
 - d) is there a gas smell in the cellar? inspect gas main and distribution pipes for leaks
 - e) is sewage disposal tied into city sewer?
 - f) are the waste pipes in good condition and properly pitched? look for evidence of leakage, especially at joints, look for patches, or other makeshift repairs
 - g) is there a dry well of sump pump in the cellar? ` where does the sump pump discharge? should be in a sewer or well away from the house
 - h) is there a trap and a vent where the waste pipe exits the house?
- 4) ELECTRICAL-check the electrical service: modern panel box will have the total capacity marked on it. If there is an old fuse box with only 3 or 4 fuses, it may mean there is only 30 to 50 amps. Many city codes require that wiring be shielded in flexible cable or rigid conduit, get familiar

with your local electrical codes or bring along an electrician to inspect house

- a) is power brought in overhead rather than underground?
- b) are you comfortable with the general condition of wiring and level of competency of installation?
- c) are all connections made in fully enclosed junction boxes?

b. **FINISHED SPACES**
GENERAL CONDITIONS

are there any signs of damp plaster? leaks, either from roof or internal pipes, check top floor ceilings, the inside of exterior walls, and ceilings and partitions under bathrooms

is there any loose plaster on walls or ceilings? plaster that crumbles or flexes when you push on it will have to be replaced

is there a noticeable bounce to the staircase when you jump on it?
are there any noticeable gaps between treads, risers, and stringers? is the stair pulling away from the wall?

is flooring original and in good repair? floors covered with carpet or linoleum can harbor many problems

do floors have a pronounced sag or tilt? place a marble on the floor and see if it rolls away, could be a serious structural flaw or just normal settling

do floors vibrate and windows rattle when you jump on floors?
indicates inadequate support, among possible causes: undersized beams, inadequate bridging, cracked joists, or rotted support posts in the cellar

windows: do sash move up/down smoothly?

do window frames show signs of substantial water leakage?

is bath tile and grout in good condition? missing caulk or grout around edge of tub can cause extensive water damage below

1) **FIREPLACES** (a-d are essential for a safe-efficient wood fireplace)

- a) is it an active fireplace with an unobstructed flue running all the way to the roof?
- b) does the firebox have a firebrick liner with a 11/2 foot hearth in front?
- c) is there an operable damper?
- d) is the flue lined with a clay-tile liner to prevent fire and fume leakage into the building?
- e) is the fireplace in good cosmetic condition?
- f) clean and inspect all flues and chimneys before using any

fireplace or wood stoves

c. **MECHANICAL SYSTEMS**

1) **HEATING**

- a) are there enough radiators or diffusers to heat all of the rooms adequately?
- b) is there evidence of water staining around radiators?
- c) when you shine a light into the hot-air register, is there any evidence of deteriorating ductwork?
- d) are the steam radiators dead level or pitched toward the condensate return pipe

2) **INSULATION**-it may be difficult to determine sidewall insulation

- a) is there any sidewall insulation evident? look near electrical outlets or other openings into sidewalls
- b) type of insulation, from most problem free to least effective: fiberglass, rockwool, cellulose, foam

3) **PLUMBING**

- a) is there adequate water pressure at the tap? inadequate could mean pipes are full of rust and scale
- b) does the water look rusty or smell unpleasant?
- c) do toilets or faucets run continually? if water is allowed to run long enough, it will wear out the fixture and begin eroding the waste pipe

4) **ELECTRICAL**

- a) are there enough outlets, one per wall? are they grounded?
- b) are the outlets in the bath ground fault interrupted?
- c) is there any surface wiring or regular extension cords tacked to the wall?
- d) are there any pull-chain fixtures?
- e) is there a functioning exhaust fan in the kitchen?

d. **ATTIC**

1) **GENERAL CONDITION**

- a) any signs of leaks, such as dark water stains, on the underside of the roof, especially around chimneys, valleys, and eaves?
- b) is the attic adequately ventilated? look for signs of mildew on underside of roof boards
- c) are there any broken or missing collar beams?
- d) are there any cracked or sagging rafters?

2) **INSULATION**

- a) any loose-fill insulation visible between attic floor joists?
- b) has insulation been blown into sidewalls?

C. **Where To Start**

To avoid expensive and frustrating work stopping in the midst, obtain all permits necessary before starting work. If the job involves more than cosmetic

work, consider hiring an architect and/or general contractor; they know what permits are necessary and how to get them. An architect can help you plan your restoration even if you intend to do the work in phases. If major structural work is needed consult an engineer.

1. Protect Your Investment
 - a. Stabilize, Protect & Secure against ongoing and potential property damage. Protect your investment!! Stop exterior deterioration before going on to the interior. Stabilize or Repair ongoing damage or deterioration.
 - 1) decide in every case whether to stabilize only and defer repair or whether it makes more sense to go ahead with a complete and proper repair. Inspect exterior for suspected water penetration. Exterior leaks eventually cause interior damage. Fix obvious leaks and water penetration, including downspout problems. Inspect for and exterminate termites and other wood-decaying insects.
 - 2) be sure that a temporary repair does not cause more damage, long-term, than it prevents short term. If the temporary repair will be expensive or if it could cause additional damage, it would be better to do a proper repair immediately. A temporary repair should always be reversible.
 - b. Protect building elements and occupants from potential damage.
 - 1) eliminate fire hazards such as: exposed or improper wiring, overloaded electrical circuits, if questions have a thorough electrical inspection by an electrician, inspect/repair boiler & chimney to prevent carbon monoxide build-up, chimney fires, etc.
 - 2) eliminate additional hazards such as: broken steps, electrical shock hazards, badly bowed or falling plaster; falling building elements, immediate health hazards as friable, or loose asbestos, airborne lead dust from chipped paint
 - c. Secure against the loss or damage of historic elements
 - 1) secure loose building parts such as stained glass panels, ornamental plaster
 - 2) secure building against break-in, vandalism, theft
 - 3) completely mask floors & unpainted woodwork before the dirty work starts
2. Documentation
 - a. Make a Record & Clean First before removing anything or making changes. Document the entire building before you change anything
 - 1) take photos of all exterior/interior conditions, be sure to get all views of each façade and each room
 - 2) make sure to have a full account of all work done, not only to look back, but also for clues to re-assembly, decoration, etc. during the course of the project

- 3) if designation is an objective, some of this documentation could be required
 - b. Clean Everything before you make any decisions regarding what's unsalvageable
 - 1) cleaning an object or area and its surroundings often changes opinions about what should stay & what should go, once the area is clean and general surroundings have been brought up to a consistent level of clean & repair, what was once old and dirty becomes old and interesting
 - 2) don't rush and don't make any irreversible decisions until you've lived in the house a while; learn what the house has to offer; see if your tastes begin to change
3. Make a Master Plan; this is the sole most important step, it will cost you to change your mind. You will waste time and money. Do not start in a room or project before gathering an overall plan. If you need help with the sequence/plan, design work, mechanical systems, structural problems or finding/scheduling outside contractors, this is the time to hire an architect. The following areas of work must all be considered in making a plan. They are interrelated and overlap, so you must think through each phase before you can finalize the master plan and complete the work in a logical sequence.
- a. Structural work is high on the list of priorities
 - 1) quite often it affects more than just the immediate area of work: plaster, woodwork, door and window operation may be affected by jacking, sill replacement, footings, etc.
 - 2) repair of structural deficiency may also be important for personal safety
 - 3) start with the foundation and sills and work your way up through the building, correcting structural conditions
 - 4) structural work is hard to do in phases, this is not recommended
 - b. Reduce operating costs if substantial/fast return on investment
 - 1) energy savings: for old buildings cost effective measures involve tightening envelope against infiltration, caulking, weather-stripping; deal with the old windows, replacement windows might be necessary, consider their payback period and aesthetic impact. evaluate heating plant and system. upgrade or replace depending on efficiency and ongoing maintenance costs, evaluate domestic hot-water system, insulation may be cost effective. Energy upgrading is difficult to do in phases because it involves whole systems and often requires opening up walls; energy upgrading should be done early
 - 2) think ahead to maintenance cycles: before making fundamental decisions consider cost-effectiveness of waiting and changing the system, anticipate and avoid unnecessary future costs, when replacing materials, match lifespans within a system.
 - c. The roof is primary protection from the weather

- 1) deal with the roof permanently before going to interior finishes
 - 2) it will save you money and tremendous time in the long run to fix it first
 - 3) consider the time of year
 - 4) site-work, while you fix the roof and related water-directing components attend to re-grading, drainage, and foundation waterproofing as necessary
- d. Mechanical systems: plumbing, heating, electrical are high on priority list
- 1) systems repair or replacement are high-ticket items which must be paid for early on to help budget costs
 - 2) work on these systems requires walls, floors, ceilings be opened up
 - 3) best not to work on mechanical systems in phases; it is inefficient, adds cost. if must phase, do this: do all the roughing for mechanical systems first to close up walls, install plumbing & electrical risers in this first stage
 - 4) think ahead to lighting; it's important to consider placement of chandeliers and sconces before the plaster is repaired
- d. Livability, health safety and sanity, crucial issues if living in during renovation
- 1) do whatever is required to avoid eating/sleeping in a dusty atmosphere; do work all at once to avoid prolonged exposure, hire a contractor to expedite work, ditto to avoid chemical fumes such as paint strippers, paints, finishes, cleansers; do whatever is required to isolate the work site from eating, sleeping, and active living areas: hang heavy plastic tarps, tape up doors, build temp partitions and hang temp doors; plan a phased approach so allow an undisturbed living area at all times
 - 2) demolitions: try to complete demolition all at once, first do those areas that are most important to you, renovation always takes longer than you ever imagined, so don't set yourself up to "do without"

- D. Checklist for Restoration
after inspection, stabilization, and planning
- demolition and removal of debris
 - stabilization of deterioration and repair of serious damage, including wood masonry, and metal
 - structural work from the bottom to the top including chimneys and masonry, insulate or waterproof as required while conditions are open
 - site-work including re-grading, drainage, waterproofing
 - roof repair or replacement, flashing, gutters, vents
 - paint stripping, masonry, wood metal
 - masonry repairs and re-pointing; large-scale wood and metal repairs and replacement
 - window, sash, door repairs
 - staining or priming

- caulking, glazing, puttying
- painting
- clean up and labeling

1. Knowledge of Restoration
Maintenance or Beyond?

* Extensive shingle failure requires complete re-roofing. Is your roof beyond spot repairs?

* Sagging beams means structural re-building. Peeling paint down to bare decay the internal structure. If these are structural, check w/an engineer, contractor, or preservation consultant.

* Brick &/or mortar deterioration/missing might lead to a structural re-building depending upon what caused the damage to begin with which can often happen when roof leaks.

a. Guidelines for Restorers and Renovators

1. Retain the original character of the house. This means preserving its original appearance and interior features.
2. Don't 'over-store'. Make sure the house still looks like an old building.
3. For major external and internal work stick to materials that were used when your house was built. Some unobtrusive use of modern materials is often necessary.
4. Details are important. This includes the type of decorative glass, moldings on doors, hardware, light fittings, and so forth.
5. Understand and respect as far as possible the original uses of rooms. Sometimes changes are necessary but try not to alter the interior so completely that all trace of the original interior plan is lost.
6. Some houses were never meant to have en-suite bathrooms. Introducing an en-suite to a small house or cottage may cause serious damage to the original character of the building.
7. Old houses really come to life when painted in fashionable colors of the period and in the manner of the period. Stick to colors and color schemes that are known to have been used on houses of your period.
8. Floors are best finished in the manner of the period in which your house was built. Avoid too much use of the floor-sander; modern polyurethane finishes should be avoided; use finishes such as japan & tung-oil.
9. Fences are important in enhancing the overall appearance of your property. Look at genuine old fences, design, construction and draw up what is wanted.
10. Garden design and plantings, especially in front garden, will best compliment your work on building in period w/house; use plant/garden layouts of the time; look at original gardens to understand type of surface used on paths and driveways.
11. Additions & alterations should be in the manner and materials of the period in which your house was built. Extra living space is often best obtained by rear

extensions. Hilly terrain often makes it possible to fit new rooms underneath by excavating. Avoid jacking-up timber cottages on level blocks b/c the result is often unfortunate.

12. Remember that it's a house, not a museum. You are part of the history also. Leave it in better shape than found.

2. Recording the Work

It is always a good idea to maintain detailed records of your restoration or rehab project as it progresses to document changes for future owners. The information is also useful when future maintenance and repair become necessary. Besides the architect's drawings, your records should consist of: contracts with the architect, before/after photographs, photos of work in progress showing details and methods of construction, invoices for labor, materials, and other info.

3. Additions

4. Relocation

- E. Completing the Interior

Selecting appropriate finishes for floors, walls, and ceilings as well as appropriate period interior details, will help complete the design of an interior. The room's use also influences the level of detail and ornamentation. You may wish to reestablish the focal points that have been altered, installing missing details in principal rooms, or removing inappropriate ornamentation from secondary rooms. Selecting appropriate colors is also part of completing the interior. Different styles of architecture are associated with different interior color schemes. Furniture, draperies, rugs, and other furnishings are important to completing the interior. Period interior fixtures are now widely available in specialty stores, salvage yards, or mail-order catalogs.

- F. Fundamentals of a Connected House

1. Roof/Gutter—Imagine a drop of rain landing on the ridge of the roof, then rolling down and across the shingles. The shingles should span the entire roof like a skill-cap, with no interruptions, such as breaks, holes, or missing pieces. Then, if the house has an overhanging eave or projecting cornice, water is further directed away from the wall below.

As the rain continues, it may rush down the valley of the roof with some intensity. To protect the historic building materials at connecting points, the valley is flashed with copper or sheet metal. This valley flashing is also part of the roofing system.

Gutters are usually attached to the eaves or built into the cornice, sometimes forming part of the decorative scheme. At the edge of the roof, gutters capture the rain water and channel it to the downspouts and drainage lines below, conducting the water away from the house before it can damage vulnerable parts of the walls.

2. Walls —Rain drops roll down the house's painted siding, are deflected by the sloping window sills, and bounce off the weatherboards. Not a single drop gets in to your cozy interior.

Overlapping clapboards or wider weatherboards serve to shed rain, just like roof shingles. Paint applied to the siding—in layers from primer to

topcoats—shields the walls still further. Trim boards protect the edges of the relatively weak siding materials. A thick, wide water table board may run along the lower edge. While its top, beveled edge sends water away from the wall, the lower edge sends it away from the foundation wall below. Moldings and lesser trim boards close any remaining gaps to the weather.

Windows make the wall itself useful to people by keeping the weather out, providing light, and letting air inside. Moreover, they perform complex functions through their sliding and close-fitting connections. Glazing compound and paint seal the glass to the sash so water can't seep in. The sloping sill at the bottom of the frame catches water washing down the sash and guides every drop to the outer side of the wall.

3. Foundation/Drainage --Supporting the house is the basic function of the foundation, but it is an important part of the weather envelope as well because it controls proper drainage from above. Also, as rain water drips off the water table board or the roof eaves above, it hits the ground, and splashes back against the above-ground portion of the foundation. When the foundation's stones or bricks are tightly connected with mortar, the water flows down the face of the foundation, not into the wall. Of course, you also need to grade the ground next to the building slopes away from the foundation. That way, rain water will be diverted from the foundation walls into the yard beyond.

From roof ridge to ground, you can see that your house is intended to be tightly connected so that both the exterior and interior are protected from the forces of nature. When problems occur at the roof, along the walls, or at the foundation, it's generally because the critical connections between parts are failing through lack of maintenance.

VIII. Maintenance & Understanding....

A. "Old-house Maintenance: Dull, But Essential"

Knowing what to look for is key. The two areas of a house that require the most attention are the parts closest to the ground and farthest from it. Roof projections, roof valleys & roof edges deteriorate most rapidly. Roof projections include dormers, chimneys, finials, and cresting.

Shingles may also deteriorate. Cupping or curling wood are signs of shingles in distress. However, they can be maintained rather easily by applying a solution of linseed oil and graphite every 5-10 years. Asphalt shingles that have curled or cupped are near the end of their usefulness.

Metal roofs, especially terne metal and galvanized, must be kept painted. Above all, avoid the "black-goop" solution! Roofing cement dabbed around the flashings & on the roof slates will last 18 to 24 months at best... Vines growing over a house also hasten decay.

Flat roofs with roll roofing demand special attention at the junction of the roof and the parapet wall and the flashing on the parapet wall. Those areas are subject to cracking and curling and as a result, leakage.

Another potential trouble spot is gutters. No gutters are better than malfunctioning ones. Without gutters, runoff usually distributes itself fairly evenly. But with faulty gutters the water collects and cascades against one area of the building. Just like the roof, gutters made of galvanized or terne metal should be kept.

Built-in gutters are an architectural delight and a maintenance nightmare because of their metal linings. The lining invariably has soldered joints, and after a couple of seasons of expansion & contraction these joints often give way, admitting water into the cornice underneath and starting a whole new decay cycle. New metal linings can be installed with expansion joints to take account of the expansion and contraction. A simpler solution is the newer rubberized roofing materials used as a long seamless lining.

Chimneys bear the biggest brunt of weathering. If the brickwork is not kept pointed, the chimney will become dangerously unstable. Similarly, copings on top of masonry walls should be kept caulked or filled with some sort of sealant, or water will penetrate from the top of the masonry and travel inside the structure.

Bottoms of buildings take the next heaviest load from moisture. Open seams in masonry and peeling, flaking paint are signs of moisture problems. But it's not always clear where the moisture is coming from. It could be working up from the ground. It could be from a defective leader and downspout system. It could even be a broken pipe somewhere inside the building. **The source of the moisture needs to be isolated and stopped.**

Masonry should also be checked as part of your inspection schedule. A chimney stack may look okay, until you closely examine the joint between the main wall and the chimney stack. You may find that the bricks there are starting to pull out and that the whole chimney stack is separating from the main wall.

Cracks in old houses are normally not a source of concern. Most cracks are just the result of normal settling or seasonal changes in the structure. When you start to see cracks in the masonry units, such as a stone lintel or cracks right through the bricks, bring in a consulting engineer to take a look.

The maintenance of ferrous metals is to keep them primed & painted. The primer is the most important element. That's what keeps the metal from rusting. Red lead is still the best primer. It is not on the general market any longer. The finish coat is merely the device to protect & lengthen the life of the primer. So priming the metal is the critical factor. If you have cast-iron ornaments, an additional factor is caulking. They are usually hollow elements built up of separate pieces bolted and screwed together. Caulking seams and joints is necessary to keep the water out and prevent rusting from starting inside...Caulk is also an essential component when you're talking about built-up wooden elements.

As far as wood maintenance, the end grain is what absorbs water. Rot fungus needs 3 things to thrive. It needs food, which is the wood; it needs oxygen; and

it needs moisture...The only thing able to control is the moisture. As long as you keep moisture levels below around 25% in wood, the rot fungus cannot propagate. So keeping water out of the wood, especially out of the end grain, is the key to wood conservation.

B. Restoration Examples/Stories

C. How to....

link to www.cr.nps.gov/hps/freepubs.htm(?)

→Assessing Cleaning & Water: Repellent Treatments for Historic Masonry Buildings

→Repointing Mortar Joints in Historic Masonry Buildings

→Conserving Energy in Historic Buildings

→Roofing for Historic Buildings

The Preservation of Historic Adobe Buildings

→Dangers of Abrasive Cleaning to Historic Buildings

→Aluminum & Vinyl Siding on Historic Buildings: The Appropriateness of Substitute Materials for Resurfacing Historic Wood Frame Buildings

→The Repair of Historic Wooden Windows

→Exterior Paint Problems on Historic Woodwork

→New Exterior Additions to Historic Buildings: Preservation Concerns

→Preservation of Historic Concrete: Problems and General Approaches

→The Use of Substitute Materials on Historic Building Exteriors

→Architectural Character: Identifying the Visual Aspects of Historic Buildings as an Aid to Preserving Their Character

→Rehabilitating Interiors in Historic Buildings: Identifying Character-Defining Elements

→The Repair & Replacement of Historic Wooden Shingle Roofs

→Repairing Historic Flat Plaster: Walls & Ceilings

→The Preservation & Repair of Historic Stucco

→Preserving Historic Ornamental Plaster

→Heating, Ventilating, & Cooling Historic Buildings: Problems and Recommended Approaches

→The Maintenance & Repair of Architectural Cast Iron

→Painting Historic Interiors

→The Repair, Replacement, and Maintenance of Historic Slate Roofs

→The Preservation and Repair of Historic Clay Tile Roofs

→Mothballing Historic Buildings

→Making Historic Properties Accessible

→The Preservation & Repair of Historic Stained & Leaded Glass

→Applied Decoration for Historic Interiors: Preserving Historic Composition Ornament

→Understanding Old Buildings: The Process of Architectural Investigation

→Protecting Cultural Landscapes: Planning, Treatment, and Management of Historic Landscapes

→Holding the Line: Controlling Unwanted Moisture in HB's Preserving Historic Ceramic Tile Floors

→The Seismic Retrofit of HB's: Keeping Preservation in the Forefront

→The Maintenance, Repair & Replacement of Historic Cast Stone

→The Preparation and Use of Historic Structure Reports

→The Use of Awnings on HB's: Repair, Replacement & New Design

D. Saving Energy, Time, & Money

1. Cooling the Natural Way

Proper Ventilation techniques do not introduce mechanical refrigeration equipment to lower air temperature. They rely on moving already cool air through your home and exhausting it after it has absorbed the heat. In the early morning the coolest air is to the west of your house, and in the evening it is to the east. If you have a basement, you'll agree that the air is always cool there. Frame houses of the Victorian era often feature deep eaves and gables that provide cooling shade. Air pulled in shaded windows will add to your comfort even when the sun is beating on your roof. Large old trees also help to cool the air around your house.

Air currents are in motion when there is no wind. This is because hot air rises. Therefore, if you have an opening low on the cool side of your house and another high on the warm side you will create a natural current—cool in, warm out. These natural air currents are called “stack,” or “convection” cooling.

The speed at which air flows will enhance its cooling ability. The ideal for encouraging the largest volume of air flow is to have input and output vents equal in size. The faster air flows, the cooler and less humid it seems. So in damper climates the input vent should be smaller than the output vent. This constricts the air and speeds its flow at the input making it seem drier and cooler. By opening and closing selected doors you can direct the air into certain rooms and keep it out of others. Old houses were designed with an eye to controlling air currents. Removing doors and partitions reduces one's ability to control air movement within the house. As the direction of the sun changes, switch your input and output windows so that input is always low on the cool side and output high on the warm side. At night, when all the air around the house is cool, open the windows in rooms you occupy so that the largest volume of cooling air flows through your “stack.”

Features built into homes aided the natural air system. Deep eaves and gables to shade the outside walls have been mentioned. Canvas awnings went up every summer to shade the windows. Awnings are most effective on the south wall of your home, where they can block all the sunlight. On the east and west walls, the awning will still admit the sun's heat when the sun is shining directly into the windows.

Inside, shutters and curtains were used to help the cooling process. This was done by tightly shuttering windows on the sunny side to keep the heat out. High ceilings also help keep living areas cool and create open spaces for better circulation. The double set of doors on the vestibule entrance traps heat, much like the modern storm door.

It makes little sense to run an expensive air conditioner to keep your house at 70 degrees when there is cooler air to be found outside. It is also better for the economy to not waste energy with an AC. Another option is an attic fan. The fan, located at the output end, pulls air in any window chosen. It requires hardly any work and uses one-tenth of the energy. The fan should be centrally located, or near a stairwell.

E. Q & A

1. Common Q's

Should I do my own house inspection?

Prospective homeowners can do much of their own inspection with the help of a few simple tools. A flashlight will improve visibility. An ice pick is the perfect tool for jabbing into beams to test for rot. Check the type of plumbing with a magnet, lead or cast-iron pipes will attract a magnet while plastic or copper will not. Hang the plumb bob out a second story window; if the weight falls about a foot away from the building base, you have an indication of some setting or bowing of the wall. Place a marble on the floor and watch it roll. Older houses generally have some sort of tilt. Use the binoculars to inspect the eaves and shingles and to see if the roof ridge bows or sags.

What aspects of a house inspection should be handled by professionals?

One area is termite inspection. You can tell if there is a serious infestation, but for subtle problems, a termite inspection needs to be done by a professional. Secondly, if you suspect a structural problem, hire an architect or engineer experienced with residential buildings to evaluate the soundness of the buildings framework.

How do I know if the building has settled?

Look for vertical cracks, which are caused by settling, changes in ground conditions or a structural failure of some sort. A diagonal crack is a typical result of earthquake damage. A vertical crack indicated a stress within the building and may be due to some structural member, such as an arch. Talk to a structural engineer or an architect to determine just how serious a crack might be.

What safety features should I look for in an older house?

Many old frame houses were built with balloon framing; go all the way from the ground straight up through the second floor to the roof. In some cases, fire blocking was never installed. Most buildings built after 1900 have fire blocking. To check for fire blocking, tap up and down the walls with a hammer or with your knuckles. On wood-frame buildings located in earthquake-prone areas look for earthquake-protection devices called seismic hold-downs, which are steel corner plates that anchor a wooden house frame to the concrete foundation and prevent the framing from hopping off during an earthquake.

What should concern me about a building's mechanical systems?

Steam radiators are generally good heat sources but may have some problems if the building has been vacant and susceptible to freezing. New heating systems can be easily retrofitted into an existing building, and plumbing can also be added. A good way to check the capacity of existing plumbing is to turn on all the faucets, then flush all the toilets. IF the water stops running, the system will probably require some work. Check the service capacity of your electrical system to see if you will have to rewire and add electrical outlets. Look for insulation in the attic and basement or crawl space, which will affect heating and cooling costs.

2. Window Q's by Chuck Fisher

Q: The double-hung windows on my Greek Revival House are loose & drafty. I would prefer not to seal them permanently. Can the problem be corrected with weatherstripping?

A: Sealing the windows may be the best temporary solution if they have warped or racked significantly or if the sash is excessively worn. In most instances, good weatherstripping combined with caulking around the outside edge of the window frame will reduce air infiltration. These 2 steps are the most cost effective way to improve the energy efficiency of older buildings. Various types of weatherstripping are now available. Some, such as vinyl V-strips & felt, are usually surface mounted, while others, such as the more durable spring bronze and zinc weatherstripping, may require grooves to be cut in the sash to create the most effective seal. Don't overlook the idea of faulty hardware. Make sure the sash lock still pulls the 2 sash together rather than spreading them apart when fastened.

Q: The windows of m bungalow have been neglected to the point where almost all the paint has flaked off. How can I tell whether or not I must replace them?

A: Peeling paint is no indication that old windows are beyond repair. To determine whether the wood is still good, poke it with a pocket knife; if the blade sinks in more than a 1/2 inch, or the wood feels spongy or crumbly, repairs are in order. Serious wooden decay is usually confined to sills and bottom sash rails. An experienced carpenter can easily repair these elements by splicing new wood into the bottom sash rail and either consolidating the sill with epoxy or replacing it. This should be far less expensive than a replacement window of good quality. Even windows in excellent condition can exhibit serious paint failure. Peeling paint should be stripped/scraped and the surface sanded. Weathered wood must be scraped or sanded to create a fresh surface. If all the paint is removed, apply a water-repellent coating before priming and repainting with high-quality exterior paint.

Q: My metal casement windows seem to draw cold air right into the house. Is there any way to make them more energy efficient, or should I simply replace them?

A: Most residential metal casement windows have no weatherstripping. Over the years, paint build-up, normal wear & minor frame deflection may create gaps where air can enter, adding drafts to the cold normally conducted by a metal-&-glass surface. A common tactic to increase personal comfort and reduce energy consumption is to install horizontally sliding storm windows on the inside—a relatively inexpensive solution. For the sake of appearance, align the point of overlap of the slider units with the vertical division between the hinged casement units.

Q: Several of the double-hung windows in the 1830's house I am restoring are so badly damaged that they must be replaced. How can I obtain new windows to match the others? Are low-maintenance aluminum or vinyl-clad units acceptable?

A: Usually, a local custom millwork can duplicate period windows. These firms often have access to cutting knives to duplicate your windows' muntin profile and molding detail. Specify that all windows be treated with a water repellent **after** being cut to size but **before** assembly, to be sure that all joints are properly treated. Certain new installation techniques allow double-hung sash to be tilted into the room for easy cleaning, and modern counterbalances can be installed with the new sash, eliminating the need for old-fashioned sash weights. Aluminum or vinyl-clad units are sometimes considered suitable for such large-scale buildings as high-rise apts. and factories, or for buildings where the windows do not contribute to the buildings architectural character. However, the 1830's sash doubtless have multiple panes and wooden muntins with a distinctive look from the outside. This look can not be recaptured with the applied and sandwiched muntins found on most vinyl and aluminum-clad windows.

3. Woodwork Q's, by Gary Hume

Q: I am converting a Romanesque Revival mansion into professional offices. The house has a large oak-paneled entrance hall with an elaborate oak staircase. Although the finish has survived in good condition, the dark stain & varnish make the entrance very dark and unattractive. Can I strip & bleach the woodwork without damaging the building's historic integrity?

A: Historic character is defined by those features, materials and spaces that make a building unique. The paneled entrance hall and stair in your rehab project appear to be character defining features equal in importance to the exterior features of the mansion; they need to be preserved—along with the historic finishes. Hiring an architectural consultant adept at paint analysis can confirm that the woodwork still wears its historic finish. In this case, even if the finish were in bad shape, restoration would be in order. The principal spaces of a building such as yours are a part of its total architectural design. A change to meet personal taste would be inappropriate. Treat the finish as you would a fine piece of furniture, with periodic cleaning and waxing. To improve the light level in the entrance hall and to highlight the woodwork, consider installing unobtrusive indirect lighting.

Q: The woodwork throughout my Victorian frame house is crazed and chipped, and varnished areas have an irregular surface and color. Must I strip all the woodwork down to bare wood to achieve a uniform finish?

A: It is rarely necessary to strip old finish completely before repainting or refinishing. For painted surfaces, the crazed or chipped paint should be scraped then sanded, by hand or mechanically, to the next sound layer. Deteriorated varnish over stain or graining can generally be removed using a solvent that will not affect the decorative features. Then simply apply a new coat of varnish.

Q: There are at least 10 coats of paint on our mantels and woodwork. The most recent color is "institutional green"—definitely inappropriate for a century-old house. Are there any easy ways to remove the built-up paint, such as sending the woodwork to a commercial dip-stripper?

A: Removing the paint from historic woodwork is time consuming. Such easily removable elements as doors and shutters can be dip-stripped successfully, but there is always the risk that the commercial stripper will leave the pieces in the stripping tank too long making the grain raised and fuzzy. Removing architectural elements such as mantels, baseboards and cornices can cause serious damage, so these elements should generally be stripped in place. Unless you are planning to put a clear finish on the woodwork, you do not need to remove all the paint before repainting, even from intricately carved woodwork. Because clear finishes were not used on decorative woodwork before the 20th century, they should be considered only for non-character-defining spaces in pre-20th-century buildings.

Q: For those areas of a historic house where clear finish is appropriate, on old flooring for instance, what would you recommend—varnish, shellac, lacquer, or polyurethane?

A: Of the four most common clear finishes, the most durable is polyurethane. Then comes varnish, lacquer and then shellac, which is an alcohol-soluble varnish. Historically, it was often used as a clear sealer over graining or marbling. It remains an excellent sealant for preventing resins from knots, as in pine woodwork, from bleeding through a paint finish and causing discoloration. Lacquer is more stable in light and heat. It too was used as a clear finish over decorative features. Neither shellac nor lacquer hold up well in high-use areas. Varnish comes in a variety of colors, consistencies and surface hardnesses. While all degrade when exposed to the sun's ultraviolet rays, a varnish finish for old flooring would provide a durable surface. Polyurethane has a very hard surface that holds up well in areas of high use; however, because it is not easily removable,-i.e., it is not an easily reversible treatment—varnishes are preferred for historic woodwork.

Q: Our 1910 Mission-style home had been turned into a rooming house before we restored it. The doors, in particular, suffered from many changes of locks, including the addition of deadbolts. We want to repair this damage and restore the woodwork to its original "golden oak" appearance. How should we proceed?

A: Strip the paint first so that you can better assess the condition of the wood. You may find other past repairs and you will be able to see the nature & configuration of the wood grain. To match the historic material, you will need to use wood of the same species and match the grain direction. In an oak door, a pine patch, with its open grain and light color, would be painfully apparent. Do any wood filling at this time, adding stain if necessary to match the filler wood. Then sand the doors or woodwork to insure that the patches are flush with the historic material. If you are still concerned about the uniformity of the final finish, consider applying a light oak stain before the final coats of varnish.

- F. Additional Resources for Rehab/store, Preservation
"Respectful Rehabilitation: Answers to Your Questions About Old Buildings"
from Preservation Press, National Trust for Historic Preservation
- answers most often asked Q's about buildings & contains Sec. of Int.
Rehab Guide

“All About Old Buildings: The Whole Preservation Catalog” from Preservation Press, National Trust for Historic Preservation
- addresses “why” & “how” of preservation

“Fabrics for Historic Buildings: A Guide to Selecting Reproduction Fabrics” Jane C. Nylander

“Wallpapers for Historic Buildings” Richard C. Nylander
-finding historically accurate fabrics/wall coverings for houses built b/t 1700-1900

“Floor Coverings for Historical Buildings” Helene von Rosenstiel/Gail Caskey Winkler
- the what, why, and where of appropriate period floor coverings, 1750-1930’s

“Masonry: How to Care for Old & Historic Brick & Stone” Mark London editor.
- basic guide to preserving old brick & stone buildings.

“Recreating the Historic House Interior” William Seale
- tells how to do research w/integrity for restoration of interiors from floors to lighting

“Landscapes & Gardens for Historic Buildings, A Handbook for Reproducing and Creating Authentic Landscape Settings” from American Association for State & Local History
- points out the importance of restoring grounds surrounding a historic site to truly reflect its past.

“A Tasteful Interlude: American Interiors through the Camera’s Eye, 1860-1917” William Seale
-includes 256 original photos, essential reference for period restorations

“The Old House Journal” & “The OHJ Cumulative Index” of all articles published from 1973-1986

Articles From OHJ

“Victorian Exterior Decoration” Roger W. Moss & Gail Caskey Winkler- provides answers to how/what colors to paint houses during Victorian period

“Victorian Interior Decoration” Gail Winkler & Moss- covers ceilings, floors, woodwork, window treatments & wall paper

“Woodwork Restoration”- practical do it yourself advice on restoring architectural woodwork

“Arts & Crafts Decorating”- 3 reprints of period catalogs, 2 from Stickley and 1 from “Shop of the Crafters”

“The Original Old-House New Compendium: A Complete How-To Guide for Sensitive Rehabilitation.” Patricia Poore & Clem Labine, Editors. Doubleday, New York. 1983

“Preserving & Maintaining the Older Home.” Shirley Hanson & Nancy Hubby. McGraw-Hill Book Co., New York. 1983. On homes built from the 17th century to 1940; wide range of topics.

“This Old House” Bob Villa. E.P. Dutton, New York, 1981. A companion book to the TV series; well-illustrated, practical guide.

“Renovating the Victorian House: A Guide for Owners and Afficionados of Old Houses” Katherine Knight Rusk. 101 Productions, San Francisco, 1982

“The Restoration Manual: An Illustrated Guide to the Preservation and Restoration of Old Buildings.” Orin M. Bullock, Jr., FAIA. Silvermine Publishers, Inc. Norwalk, CT. 1966

“Restoring Houses of Brick & Stone” Nigel Hutchins. Van Nos Reinhold, Ltd., Toronto, New York. 1983.

“Restoring Old Houses” Nigel Hutchins. Van Nostrand Reinhold, Ltd., Toronto, New York. 1980. Little known facts plus a practical tool to help preserve your property.

“The Complete Book of Home Inspection: for the Buyer or Owner.” McGraw-Hill, Inc., New York 1980. Over 150 photos and drawings to help recognize trouble spots. Step-by-step procedures used by professional home inspectors. Good glossary.

“Textiles in America – 1650-1870: A Dictionary Based on Original Documents, Prints and Paints, Commercial Records, American Merchants’ Papers, Shopkeepers Advertisements and Pattern Books with Original Swatches of Cloth.” Florence M. Montgomery. W.W. Norton & Co., New York. A Winterthur/Barra Book. 1984.

“Wallpaper in America: from the 17th Century to WWI.” Catherine Lynn. A Barra Foundation/Cooper-Hewitt Museum Book. W.W. Norton & Co., Inc., New York. 1980.

“Salvaged Treasures: Designing and Building with Architectural Salvage” Michael Litchfield and Rosemarie Hausherr. 1983. A how-to on reclaiming windows, woodwork, plumbing and other discarded parts of buildings.

“Sourcebook of Architectural Ornament: Designers, Craftsmen, Manufacturers & Distributors of Exterior Architectural Ornament.” Brent C. Brolin and Jean Richards. Van Nostrand Reinhold, New York. 1982.

- IX. Historic Designation
 - A. Why Get Designated

Designation is the way local governments protect historically significant structures and districts.

1. “Formal listing, as with the National Register, may protect a property from adverse impacts of publicly funded projects, such as highways. Formal listing may also make a commercial property eligible for grants or tax credits that encourage preservation treatment in accordance with the Secretary of Interior Standards for Rehabilitation.” – AIA Guide to Historic Preservation

Historical designation generally places fewer restrictions on property alterations than most newer homes that have CC&R's. (Codes, Covenants, & Restrictions)

2. Mills Act tax incentive –

- a. how to apply

submit a request & pay a one-time fee based upon the value of the site; contract form will come from the county with a minimum term of 10 years; contract belongs with property when sold; great selling point

Mills Act property tax reduction for locally designated sites in certain areas of the City of SD. Contracts entered into based on the Mills Act state law allow a different method of property tax valuation to be prepared by the County Tax Assessor.

Min. Requirements:

- 1) contract term of 10 years
- 2) owner shall maintain regulated characteristics of historical significance of the site in accordance w/rules and regulations published by Sec. Int.
- 3) Owner must allow reasonable periodic examinations of the site if requested by rep. of County Assessor, State Dep. Parks, and Board of Equalization
- 4) city may cancel the agreement following a duly notice public hearing if it is determined that the owner breached any mandatory conditions of the contract

Restrictions:

- 1) The contract shall contain the minimum mandatory conditions required by state law.
- 2) The owner shall pay a graduated processing fee of \$100 per \$100,000 of assessed value prorated to actual value
- 3) Drive by inspection will be performed on a periodic basis by staff to verify that the structure is maintained
- 4) The owner must allow visibility of the exterior of the structure from the public right-of-way
–City of SD, CA Council Policy 700-46

3. Federal Rehabilitation 20% tax credit

This is a fairly involved process which requires approval by the National Park Service for the proposed work before you do it, and certification after it is done that it complies with Sec. of Int. Standards.

– more a savings than a deduction

- a. requirements to determine eligibility

4 factors to help aid whether or not project proposal would meet application requirements for 20% tax credit

1. historic site must be listed in National Register of Historic Places or certified as contributing to significance of a “registered historic district”
 2. After rehab, site must be used for an income-producing purpose for min. 5 years; owner-occupied residential properties do not qualify.
 3. must meet the “substantial rehab test;” meaning that the cost of rehab must exceed the pre-rehab cost of building.-test must be met w/in 2 yrs. or 5 if project completed in multiple phases.
 4. rehab work must be done accord to Sec. Int. Standards
4. Other financial incentives
- a. revolving fun loans
 - b. façade improvement programs—ability to donate a façade easement to the City of other historic preservation agency as a charitable donation deduction from income taxes
 - c. design assistance
 - d. low interest loans
 - e. tax exempt bonds
 - f. property values—values either remain the same or go up
5. economic reasons
this is by far the best solution to not add any more to landfills and air pollution, as well as energy wasted

B. Statistics of Designated SD Structures/Sites

1. Over 700 historic buildings have been historically designated by the City of San Diego, 15 historic districts have been designated & these 16 are pending:

Islenaire – City Heights: report by city staff is done

Balboa Park – report by city staff in incomplete

Warehouse Thematic East Village- Report by city staff in progress

South Park- Citizen interest not yet listed with city staff records

La Playa Trail- Citizens’ report submitted: held for staff review

Loma Portal- Citizens’ report not yet listed with city staff records

African American Thematic District- East Village African American Study submitted to City

Mission Hills 1- “Sunset,” Citizens’ report held for staff review

Mission Hills 2- “Trolley Line,” Citizens’ report held for staff review

Mission Hills 3- “Arden Way,” Arden Way, Hickory, Arquello Streets, Citizens’ report initiated

Mission Hills 4- “Wetherby,” Citizens’ report in progress

Mission Hills 5- “Hermosa Way,” Citizen interests

David O. Dryden- North Park, Pershing & 28th Street, Citizens’ report in progress

North Park Commercial District- Citizens’ interest

North Park Panorama Terrace- Citizen interest

Kensington Historic District- Citizens’ report in progress

The existence of a strong neighborhood organization whether created before or after the establishment of the historic district, has a positive impact-socially and economically- on the district.

C. HRB

1. Criteria A-E- The HRB designations are determined by each criteria, so a site can be designated by multiple criteria as is examined/assessed under each category
 - Criteria A- exemplifies/reflects special elements of the City's, communities or a neighborhood's historical, archaeological, cultural, social, economic, political, aesthetic, engineering, landscaping or architectural development
 - Criteria B- identified with persons or events significant in local, state or national history
 - Criteria C- Embodies distinctive characteristics of a style, type, period or method of construction or is a valuable example of the use of indigenous materials or craftsmanship
 - Criteria D- representative of the notable work of a master builder, designer, architect, engineer, landscape architect, interior designer, artist or craftsman
 - Criteria E- is listed or has been determined eligible by the National Park Service for listing on the National Register of Historic Places or is listed or has been determined eligible by the SHPO for listing on the State Register of Historical Resources
 - Criteria F- is a finite group of resources related to one another in a clearly distinguishable way or is a geographically definable area or neighborhood containing improvements which have a special character, historical interest or aesthetic value or which represent one or more architectural periods of styles in the history and development of the City

D. Levels of Designation

"A property should be compared to similar examples to establish its relative value. Properties are also evaluated on the basis of their local, state, national, or global significance." –AIA Guide to Historic Preservation

1. Local Designation – "Local lists are usually prepared by a municipal landmark commission. In San Diego, this list is gathered from a survey. It is either a professional the City of San Diego has hired, a local neighborhood group, or a development company that conducts these surveys.. These are not always done to the best of abilities; this could be for hidden purposes of the developer or because the surveyist was not competent enough. Properties and districts may be listed as local landmarks." – AIA Guide to Historic Preservation
2. State Designation
3. National Designation
 - "National Historic Landmark designations are made by the U.S. Secretary of the Interior and are administered by the National Park Service. This list is limited to properties of national significance and

involves strict criteria, thorough documentation, and a more rigorous review process than the National Register. Fewer than 5,000 properties have been designated as National Landmarks.” – AIA Guide to Historic Preservation

a. National Register of Historic Places “administered by the National Park Service and SHPO in each state. This register lists historic properties that meet the criteria of the National Register and maybe of local, state, or national significance. More than 50,000 individual and historic district properties are currently included in the Register.” – AIA Guide to Historic Preservation

National Register status can be located at the National Register Information System at <http://www.cr.nps.gov/NR/research/nris.htm>

A register listing does not always protect a building, but it does show significance of the structure.

If not part of an existing local historic district, consider its ability to be incorporated into one, visit <http://sohosandiego.org/histdistricts/index.htm>

benefit—tax incentive

For National Register sites and districts, the ability to obtain tax credits for improvement expenditures related to the substantial rehab of the site. Tax credit applies to personal or corporate taxes.

4. Global Designation

“The World Heritage List is administered by the International Committee on Monuments and Sites (ICOMOS). This survey was initiated by the United Nations in 1972 and is limited to sites of worldwide significance. Only 18 sites in the United States have been designated as World Heritage Sites. Ex: Independence Hall in Philadelphia and Mesa Verde in Colorado” – AIA Guide to Historic Preservation

X. Designation Kinds

- A.
 - 1. Stand-Alone
 - a. benefits
 - 2. incorporated

B. Historic District

“No city can hope to understand its present or to forecast its future if it fails to recognize its past. For by tracing the past, a city can gain a clear sense of the process by which it achieved its present form and substance; and , even more importantly, how it is likely to continue to evolve. For these reasons, efforts directed to identifying and preserving San Diego’s historic and archaeological resources—with their inherent ability to evoke the past—are most advisably pursued.”—The City of San Diego’s adopted General Plan

“A Historic district means significant concentration, linkage or continuity of sites, buildings, structures that are united historically, geographically, or aesthetically by plan or physical development and that have a special character, historical interest, cultural or aesthetic value or that represent one or more architectural periods in the history and development of the City of San Diego.”

Many times, buildings that are not significant in themselves become important when viewed as part of a larger collection. Typically residential neighborhoods with high concentrations of similar homes having a common history of candidates for historical districts.

Within designated historical districts, legislative protection for all historically designated sites within the district contributing to retention of desirable neighborhood fabric and character. Some historical districts have design guidelines that affect all properties within the district to ensure neighborhood character is retained

1. Why?

“To maintain, protect, and preserve the scale and basic character and salient architectural details of homes within a historical district; not a static museum, but a living, changing neighborhood. There is room for private renewal and architectural creativity, within controls and standards of the district. Historical designation in a neighborhood will encourage continuous research into a community’s human past and culture for the benefit of future generations and protect our high-quality architecture, mature landscaping, and pedestrian orientation of our historic community by denying demolition of existing older homes...A historic district will provide protection from demolition, insensitive alterations and out-of-character new construction and emphasize the value of the historic neighborhood.”

2. Types of districts

There are four primary types of recognized historical districts. These include geographic/traditional historical districts, thematic historical districts, voluntary/traditional historic districts and emerging historical districts

Geographic/Traditional Historical District: Covers a small geographically definable area with an identifiable boundary. This type of district is the traditional type that includes a finite group of resources related to one another in a clearly distinguishable way and within a geographically definable area, which have related character, architectural styles, interrelationships, and physical proximity and association. Typically 65% of structures are contributors.

Thematic Historical District: Has no boundary

This type of District includes a finite group of resources related to one another in a clearly distinguishable way by a common theme related to historical context, architectural style, development period, or other characteristics, where visual continuity is not significant and sites are not necessarily located within a geographically contiguous area. 100% of structures are contributors.

Voluntary/Traditional Historical District: covers a small geographically definable area with an identifiable boundary. This type of district includes a group of resources which are part of a finite number related to one

another in a clearly distinguishable way with related character, theme, architectural styles, development period, or other characteristics, and which are located within an area that has had a historical survey completed and is geographically identifiable. The establishment of a Voluntary/Traditional District require 51% of the potentially contributing sites to volunteer their property for designation.

Emerging Historical District: Variable geographic boundaries expected to narrow as the district develops. This type of district includes a group of resources related to one another in a clearly distinguishable way with related character, theme, architectural styles, development period, or other characteristics within a geographically identifiable area which could one day cumulatively develop sufficient concentrations to bring it to the level of a geographic or Thematic Historical District. Requires initiation by 10% of estimated potentially contributing sites.

C. Established Historical Districts

No.	HRB Site #	Historical District Title	Yr. Adopted
1	1	El Prado (in Balboa Park)	1967
2	14	Old Town State Park	1970
3	112	Theosophical Institute (Pt. Loma)	1976
4	117	El Pueblo Ribera (La Jolla)	1977
5	127	Gaslamp Historic	1978
6	130	Greater Golden Hill Historic	1978
7	207	Chinese-Asian Thematic	1987
8	208	Sherman Heights Historic	1987
9	217	Grant Hill Park Historic	1988
10	357	Bishop's School Historic (La Jolla)	1998
11	405-411	Auxiliary Naval Air Station Brown Field Historic (Otay Mesa)	2000
12	422	Talmadge Gates Historic	2000
13	424	Shirley Ann Place Historic	2000
14	425	Naval Training Station Historic	2000
15	442	Ocean Beach Cottage Emerging Historic	2000
16	526	Burlingame Voluntary/Traditional Historical District (North Park)	

revised 2001

It is the context of the property and the assurances from the surrounding stakeholders in the community that boost values.

D. Benefits of Historic Districts:

Historic Districts often mirror the entire community in terms of their economic, educational and racial diversity.

Historic districts promote increased levels of home ownership.

People moving into historic districts aren't just passing through but tend to be home owners for extended periods, adding stability to the neighborhood.

Buyers who choose historic districts often have wider choices and get more house, dollar for dollar, for their money.

Historic downtown still effectively serves its traditional multifunctional role in a community.

Historic districts seem to have the greatest positive impact on property values when the preservation commissions in control have effective communication of their rules and clear guidelines.

The existence of a strong neighborhood has a positive impact, socially & economically, on the district.

Investment will be attracted sooner and more consistently if there is a package of incentives to accompany the regulations or “sticks” of the historic district commission.

Investment will be attracted sooner and more consistently if there is a package of incentives to accompany the regulations of the historic district commission.

Historic districts effectively provide quality housing for citizens of every economic level.

E. Hurry!

“First, as fine historic homes are reduced to rubble to make way for much larger new homes, the architectural and cultural heritage of our communities is eroded and forever changed. Second, the massive, out-of-scale structures being built to replace older homes do not fit well in historic neighborhoods and threaten the very qualities that make these neighborhoods attractive and desirable...The livability of historic neighborhoods is eroded and in many cases, these new ‘Monster Homes’ block views and eliminate side and back yards...Designation helps to preserve architectural detailing, the use of high-quality materials, craftsmanship, historic character and charm. While historic designation does not freeze development, it does help to ensure that any enlargements or additions to existing homes are done with sensitivity & in a manner consistent with the historical guidelines that will be created.” (Reference: “Protecting America’s Historic Neighborhoods: Taming the Teardown Trend” by Adrian Scott Fine & Jim Lindberg)

1. contributing site
 - contributes to the historic district; must meet significant characteristics of a district and be specifically designated historic resources; eligible for all benefits and responsibilities of HD
2. potential contributing site
 - able to be restored to the original character of the design of the home
3. non-contributing site
 - either new home/remodel beyond original design integrity; no longer contribute to neighborhood; not eligible for benefits of HD unless integrity restored back to original; HRB would have the deciding vote to become eligible for benefits, but regardless it would still be part of a historic district as a non-contributing site
4. benefits/responsibilities

-Mills Act can significantly reduce property taxes (LINK), which is the statewide preservation law enacted by former State Senator Jim Mills that allows for a significant reduction in the property taxes of designated historic a 30-70% reduction in property taxes

-National Trusts states that historically designated residential districts enjoy 10-25% higher property values versus similar homes w/o designation

-permit would need to be obtained for major alterations to exterior of home; changes would have to be compatible with style or character of home so as to maintain historic appearance; to reduce impact of additions it is recommended that new construction be concentrated on rear/sides or non-public sides of the home; currently permits have to be obtained for these things anyway.

-no restrictions to interior of home, although preferred if alterations comply with Sec of Interior's standards (LINK)

-HD does not include yard; possibility of more latitude in concern with heights landscaping/fences

-less restrictions in HD than in a new subdivision
effects of preserving historic neighborhoods

→ a diversity of housing sizes, quality, price range & configuration

→ goods and services within walkable distances

→ establish social infrastructure—schools, churches, hospitals, social agencies and neighborhood organizations

→ property owners often perceive that the value of their asset is confined within their property line, however the value of real estate is intensively interrelated with what is beyond the property boundaries; when a historic building is maintained/rehabed, the financial benefits accrue to adjacent building owners, local gov./businesses as well as owner

→ historical district designation can increase property values upwards of 30% beyond normal appreciation. Appraisers of historical properties believe that as a historical district provides protection to individual homes by maintaining community context, property values are substantially increased

5. Structures and Landscapes in HD's are protected by district regulations

6. HRB will determine upon designation of an HD those features and characteristics deemed essential to the maintenance of the district's architectural &/or historical integrity.

How much remodeling is allowed on a building within a historic district

-That depends. To qualify as a historic property, a building must retain its "integrity" evidenced by the survival of physical characteristics that existed when it attained significance. Although seven qualities of "integrity" do not need to be present for the building to be historic, but enough physical evidence must be present to provide a sense of past time and place. Not only must a property resemble its historic place, it must retain "character-defining" features such as physical materials and aspects of construction from the period. Generally, one can do almost anything as long as the front façade is not altered. Additions to the rear or set back from the side as long as the new work is clearly different from the old and compatible with the historic materials, features, size, scale, massing to protect the integrity of the property and its environment. A Certificate of Appropriateness (COA) is required for any addition.

F. Benefits/Responsibilities of Owners

“These inventories provide critical information for local, state, and federal planning. Being identified as a historic property usually places no legal restriction on the owners use or treatment of the property. Locally listed properties and districts may be subject to a review of changes made to the historic qualities of the properties.” – AIA Guide to Historic Preservation

This means that on a local level, the City has more control over what can/not be done to locally designated sites, however on a national level, designation saves the site from large publicly funded projects, such as a highway by way of it having national significance.

An owner w/ a designated historical property accrues the responsibilities & benefits of historical designation property.

1. responsibilities
 - a. to retain/maintain the resource, use Sec. of Int. Standards for review of property
 - b. proposed relocation, substantial alteration & demolition discouraged, would require historical Site Development Permit in accordance w/SD Municipal Code Section 126.0502(d)(E) which would be approved by Planning Board w/rec. from HRB
 - c. alterations reviewed for consistency w/Sec. Int; alterations exempted per SD Municipal Code Section 143.0220 from the requirement for a historical Site Development Permit unless project qualifies as a major alteration
→ attention is focused on those areas of the site/building that are visible to the public
 4. Typically, local historical designation does not affect proposed interior alterations (unless portions of the interior were specifically called out in the designation of the site)
2. benefits
 - a. Mills Act property tax reduction for locally designated sites in certain areas of the City of SD. Contracts entered into based on the Mills Act state law allow a different method of property tax valuation to be prepared by the County Tax Assessor.
 - b. Per SD Municipal Code Section 126.0303 access to a historical Conditional Use Permit that may allow a use for historical sites not normally permitted in the zone.
 - c. Use of the more lenient Cal. Historical Building Code for all local, state, federal historically designated sites
 - d. Within designated historical districts, legislative protection for all historically designated sites within the district, contributing to retention of desirable neighborhood fabric and character; some historical design guidelines that affect all properties within the district to ensure neighborhood character is retained.
 - e. ability to donate a façade easement to the City or other historic preservation agency as a charitable donation deduction from income taxes
 - f. For National Register sites and districts, the ability to obtain tax credits for improvement expenditures related to the substantial

rehab of the site. The tax credit applies to personal or corporate taxes.

- g. Many studies show that historical designation increases property values

3. Examples:

4. Heritage Tourism & District Programs

Historical districts benefit from improved image; people take better care of their homes and take pride in the neighborhood. New owners are attracted to historical areas and fix up dilapidated homes; when this happens to multiple properties over time, property values increase as overall appearance of neighborhood improves. Some historical districts have programs in which area merchants give discounts to residents shopping in the district, or raise money each year for their neighborhood association through house/garden tours which continue to publicize the benefits of living in the community. According to nation-wide studies, "Heritage Tourism" is one of the major revenue generators in many cities across the country; owners of designated properties also find that having a Mills Act agreement and the prospect of lower property taxes for the purchaser actually helps them sell their buildings.

G. Step by Step Designation Checklist

- 1. Designation Report Guidelines
- 2. Included in Report/Research Resources/Credit Given When Due
 - a. list of owners
 - b. notice of completion
 - c. water & sewage hook-ups
 - d. note owners, occupants, professions, obituaries
 - e. architect/builder
 - f. photos
 - g. architect's bio
 - h. fire map copies/Sandbourne maps
 - i. previous owner's oral interview/other
 - j. Residential Building Record