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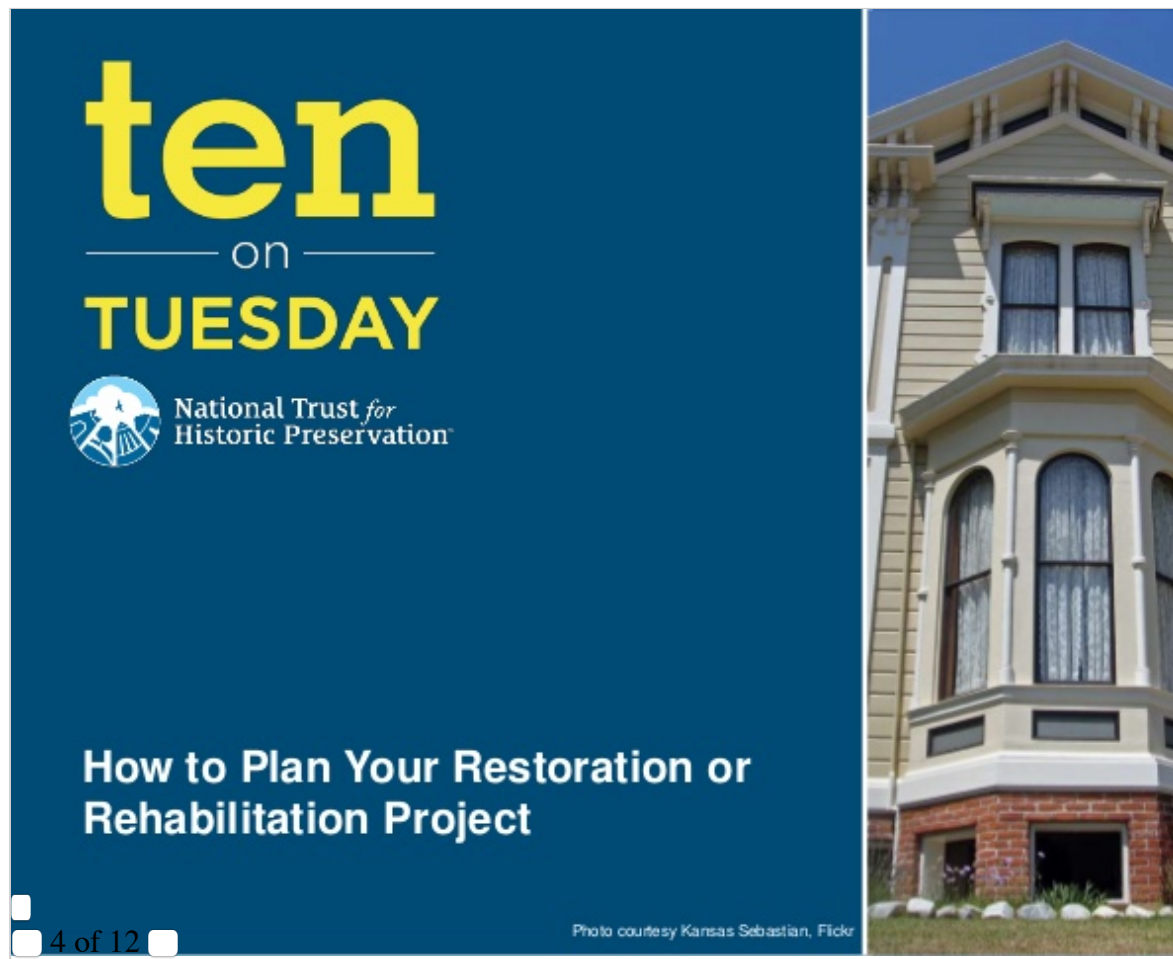
How to Plan Your Restoration or Rehabilitation Project

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[10 on Tuesday] How to Plan Your Restoration or Rehabilitation Project [Link: [//www.slideshare.net/PreservationNation/toolkit-plan-your-restoration-or-rehabilitation-project-130604jr](https://www.slideshare.net/PreservationNation/toolkit-plan-your-restoration-or-rehabilitation-project-130604jr)] from [PreservationNation](#) [Link: [//www.slideshare.net/PreservationNation](https://www.slideshare.net/PreservationNation)]

After you've [researched your historic home's history](#) [Link: /10-on-tuesday-10-tips-for-finding-clues-to-your-homes-history/] and determined [whether you're restoring or rehabilitating it](#) [Link: /10-on-tuesday-restore-vs-rehabilitate-which-is-right-for-your-historic-house/], you can start planning your project. As we showed [in the previous toolkit](#) [Link: /10-on-tuesday-should-you-diy-or-hire-a-professional/], you can take on as many or as few aspects of planning as your little home-owning heart desires. But no matter who helms the project, planning should include these integral steps.

1. Investigate existing conditions. What parts of the structure, materials, finishes, fixtures, mechanical, and other systems are in good condition? Which need to be restored, rehabilitated, repaired, or replaced? A professional looking into existing conditions should be able to determine the severity of any problems discovered. A crack in the masonry wall, for example, may look dangerous to you, but to an architect familiar with historic buildings, it is only cosmetic. On the other hand, you might think a paint job will fix the peeling exterior, but an architect might see a buildup of moisture inside the wall and possibly severe damage to the house's structural system.

2. Develop 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 more -- that make the house livable for you and your family. It will help you to decide where to locate new uses, such as an exercise room and home office, which were never part of the original design. A carefully developed architectural program also insures the house will be functional after the restoration or rehabilitation is completed.

3. Start with the conceptual design phase. This first phase consists of preliminary plan and elevation drawings based on the architectural program and the inspection of existing conditions. Architects will often provide two or three alternative conceptual designs for you to review, discussing the virtues of each and their effect on the historic character of the house.

4. Continue with the design development phase. Based on your response to the concepts, the architect further develops one design, or some combination of the options. At this stage, the architect will also determine the location for the mechanical, electrical, and plumbing system; make sure that the design complies with local building code requirements; consider alternative methods and materials of construction; and select

materials and finishes. In addition, the architect will usually outline specifications and give a preliminary cost estimate as a part of this phase.



[Link:

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5. Go before the review board (if needed). If your house is subject to [local design review](#) [Link: /10-on-tuesday-10-basic-elements-of-a-preservation-ordinance/] or if you will be obtaining tax benefits for the project, you'll then submit the design development drawings and outline specifications to the review board. Most review boards will also ask for a simple form sharing information about the house, a site plan, photos of the existing house and neighborhood, samples of major new materials, and paint colors. If approved, they'll issue you a "certificate of appropriateness" or similar document to submit along with the contract documents to obtain a building permit. If not approved, the review board should specify why the design doesn't meet the local standards or guidelines, and will often work with you and your architect to correct any issues.

6. Create the contract documents. Contract documents consist of working drawings (aka blueprints) and specifications. The specifications are particularly important in a restoration project, as many of the procedures and materials are not commonly used in new construction. The contract documents are then used to obtain bids from contractors. They

also become part of the contract between the homeowner and the contractor, detailing the work to be done for the price established.

Note: Some review boards will require you to submit the contract documents in addition to the design development drawings to ensure that major changes have not occurred during the last phase of project planning.

7. Obtain a building permit. Required for most work other than minor repairs, building permits are issued by the municipal or county building permit department or, in some jurisdictions, by the fire marshal. They ensure that the proposed work meets the building code and that the house will be safe to occupy after completion. If you plan to phase the work over a number of years, be sure to inform the department, since most building permits are good for only 12 months from the date they're issued. If you hire a general contractor, he or she will usually obtain the necessary permits.



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8. Sequence the construction. Each project's sequence will vary depending on the type of work involved, who is doing the work, the time of year, and whether you plan to live in the house during its restoration or rehabilitation. (That said, some orders are standard -- for

example, completing structural roof repairs before re-roofing, or having plasterers come in before painters.) One of the hardest parts of sequencing construction is making sure that subcontractors and craftspeople show up when needed. If they don't, you will need to revise the schedule quickly so you don't lose time and money. And if you do plan to live in your house during construction, consider how the work will disrupt your daily activities and how your presence may alter (or lengthen) the sequence of construction.

9. Complete the interior. Whether you or a contractor are handling the interiors, in all cases you'll want to be appropriate to the style and era, as well as to the home's unique history. Items to consider include the proportions, surface materials and ornamentations, focal points, colors, fixtures, and furniture for each room in the house.

10. Record the work. Maintain detailed records of your restoration or rehabilitation project as it progresses. This not only documents changes for future owners, but comes in handy for future maintenance and repair. Besides the architect's drawings, hold onto all contracts with the architect, general contractor, subcontractors, and craftspeople; before-and-after photographs of the house, as well as in-progress shots; and invoices for labor, materials, and other information on construction costs.

Julia Rocchi is the director of content marketing at the National Trust. By day she wrangles content; by night (and weekends), she shops local, travels to story-rich places, and gawks at buildings.



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