

Project Name: _____ HSR Preservation Plan

Checklist prepared by: _____

Historic Structure Report & Preservation Plan Checklist

PREFACE

Introduction

(3 to 5 pages)

Table of Contents

HSR	PP	Amend	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Paginated Table of Contents

Executive Summary

(2 to 3 pages)

HSR	PP	Amend	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name and location of resource
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overall description of the building or structure including number of stories, construction materials, major elements or features and site features
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dates of construction and major alteration(s)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prioritized zones of significance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Document purpose and scope
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Research completed in preparation of document
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overall recommended treatment approach
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior preservation, rehabilitation, restoration or reconstruction efforts
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Description of major issues in document
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	General recommendations for work at major elements/features
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interpretive programs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Owners and stewards
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintenance/treatment provisions

HSR	PP	Amend	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Statement of significance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Historic designations as applicable
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Description of methodology
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organization of document
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Funding sources
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals or consultants involved in preparation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contracting or sponsoring individuals, groups or organizations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Extent of time available or needed to prepare document
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parameters and/or limitations of document
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommended areas of future study
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Acknowledgments of those who assisted in or cooperated with the document preparation

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HSR

Preservation Plan

PART I. DEVELOPMENTAL HISTORY

History of the Property

(Minimum 15 pages for HSR, 5 pages for a PP and 1 page as necessary for amendment)

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Methodology of research
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Historical and cultural significance
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Architectural significance
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site/landscape significance
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chronology of ownership, construction, alteration(s), use and significant events
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Prior studies or treatment efforts, dates and individuals or firms involved
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Copies of available historic documents, maps, illustrations and photographs
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Complete citations for primary source material as it informs the text
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	National and New Jersey Register Nomination Forms and prior Individual Intensive Survey Forms, if completed

Archaeological Evaluation

HSR	PP	Amend	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Statement of significance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Research design and methodology
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Results of research and testing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interpretation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Archaeological site plan
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Photographs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Artifact inventory and analysis
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Detail drawings and sketches
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Acknowledgement of potential sub-grade resources as identified in development property history
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Acknowledgement of proposed areas of ground disturbance and potential impact on sub-grade features
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommendations for future research

Site & Landscape Evaluation

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Significance of landscape and site
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Methodology of research
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chronology of alteration and use
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site boundary modifications
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Major changes to topography and hydrology
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Access routes and paths
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Built features, trees and plantings
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Features and conditions immediately surrounding buildings and structures
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior treatment efforts, dates, and individuals involved
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Copies of pertinent historic documents, maps, illustrations and photographs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Photographs, scaled site plan and drawings of current conditions
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Proposed areas of modification and potential impact on historic context
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommendations for future research

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Architectural Description

(Paragraph to 5 pages per feature or area)

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Methodology used in conducting evaluation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Narrative description of site and conditions (if Site & Landscape Evaluation is not included)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Narrative description of exterior and interior conditions
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Identification of character-defining and significant elements and features
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chronology of alterations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Findings from any additional research
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Description of materials and/or features and period of construction, installation or modification
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site plans, floor plans, elevations and sections of current conditions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Measured drawings of moulding profiles, significant features, hardware, mechanical elements, detail drawings, etc.
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Recent photographs
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Recommendations for future research

Structural Evaluation

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Significance and description of structural system
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Methodology of conducting evaluation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chronology of structural alterations
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Existing conditions of the structural system
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Capacity to adequately support recommended treatment, use and interpretive programs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diagrams of earlier structural systems
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior treatment or remedial effort
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Drawings and photographs of existing conditions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommendations for future research

Building Systems Evaluation

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Significance and description of building systems
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mechanical engineer's report
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assessment of environmental conditions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Electrical engineer's report
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Plumbing engineer's report
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Security reports
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fire protection engineer's report
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Communications, computer networking, and applicable technological improvement studies
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Energy efficiency recommendations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommendations for future research

Materials Analyses

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Paint analysis
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mortar analysis
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other materials analyses
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Photographs
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommendations for future research

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PART II. TREATMENT & USE

Treatment Philosophy

(1 to 3 pages)

HSR PP Amend

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Treatment philosophy(s) and boundaries as appropriate, including an appropriate period of significance for the resource |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Advantages and disadvantages of alternative treatments |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Statement of potential impacts of recommendation on the overall building and site |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Rationale for proposed treatment recommendation |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Substantiation for treatment philosophy |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Plans or elevations delineating boundaries of areas of treatment if more than one treatment is proposed |

Use & Interpretation of the Resource

(1 to 10 pages)

HSR PP Amend

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Proposed and recommended use |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Impact of proposed use on historic fabric, systems, and the surrounding site, as applicable |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Reasoning for capital project |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Interpretive programs |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Ownership, stewards and interpretation |

Code & Accessibility Review

HSR PP Amend

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Methodology of conducting evaluation and limits of area/issues of review |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Preliminary code and accessibility review |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Potential threat(s) to life-safety |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Recommendations and alternatives for improvement |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Impact of improvement recommendations |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Recommendations for variance(s) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Recommendations for future research and evaluation |

Property Treatment Recommendations

HSR PP Amend

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Recommended modifications for property with reference to existing conditions documentation |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Potential impact on historic context |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Acknowledgement of potential sub-grade resources as identified in development property history |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Acknowledgement of proposed areas of ground disturbance and potential impact on sub-grade features |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Site and landscape plans to describe intent as necessary |

Architectural Treatment Recommendations

(Minimum of a paragraph per identified room or feature)

HSR PP Amend

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Recommended treatment |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Statement of potential impacts of recommendation on individual features, as applicable |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Supporting schematic drawings, floor plans or elevations to describe intent as necessary |

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Furnishings & Interior Decoration Recommendations

HSR PP Amend

- Furnishings recommendations
- Interior decoration recommendations

Summary of Recommendations

HSR PP Amend

- Summary of recommendations

Prioritization & Cost Estimate

HSR PP Amend

- Prioritized list of recommendations
- Preliminary cost estimate for all recommendations
- Identification of needed research and testing and estimated costs for its completion
- Identification of excluded work items

PART III. RECORD OF TREATMENT

Physical Project Completion Report

HSR PP Amend

- Statement of the intent of each physical improvement project
- Identification of how the work was approached and the means of accomplishing the work
- Identification of individuals involved in the completion of the work including staff, volunteers, design firms and professionals in addition to construction firms and supervisors
- Identification of the various phases of the project and the results, cost and duration of each phase
- Identification of any discoveries or confirmations of assumptions resulting from the undertaking
- Photography of areas affected by work before, during and after project
- Inclusion of construction drawings and specifications; as-built drawings; product submittals including shop drawings, samples, material data sheets, color samples and cut-sheets
- Inclusion of field notes, drawings, project correspondence, project schedule with any revisions
- Inclusion of contract information with design professionals and contractors, project financial accounting information

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APPENDICES

Maintenance Plan

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	List of routine and cyclical maintenance items and corresponding time or intervals
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	List of routine and cyclical inspections and appropriate time or intervals
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	List of materials, cleaning methods and cleaning intervals
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Computerized inspection checklists
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Maintenance and work description form
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Format for inspection and repair logbook

Vulnerability & Hazard Assessment

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Identification of potential property-related vulnerabilities or hazards to people, buildings, structures and/or objects
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Recommendations to minimize potential property threats
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	References to other sections of the HSR, PP or amendment that include reference to vulnerabilities and hazards and associated recommendations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommendations for additional evaluation and review

Appendix Sections

HSR	PP	Amend	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bibliography
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Glossary of terms
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RFP or scope of work statement
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Updated Individual Intensive Level Survey Form, complying with HPO Architectural Survey Guidelines (paper and electronic copy)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior and/or revised National and New Jersey Register Nomination of Historic Places forms, if completed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior Individual Intensive Level Survey Form, if completed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Transcripts of interviews
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Financial planning or fund raising activities recommendations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Professional services contracting guidelines for future consulting work
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other relevant reports or information as appropriate

Information that may be included in appendix if not included in the remainder of the document:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Copies of available historic documents, maps, prints, drawings and photographs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Measured drawings of current conditions: architectural, engineering, landscape, etc.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Photographs of current conditions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Archaeological evaluation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Site and landscape evaluation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Structural evaluation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Building systems evaluation
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Paint and mortar analyses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other materials analysis reports (e.g. dendrochronology, moisture content, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Furnishings and interior decoration recommendations
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Maintenance plan
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vulnerability and hazard assessment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Emergency preparedness plan
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Biography and/or copies of prior HSRs, PPs or other studies