

Conditions Assessment Report Guidelines for Historic Structures

What is a Conditions Assessment Report?

A Conditions Assessment Report is a preservation and rehabilitation tool that identifies, describes, and generally evaluates the existing condition of a historic structure, typically a historic building, and its associated environment. It is a detailed accounting of the material elements and components of a historic structure, including its structural system, exterior and interior finishes, architectural ornamentation and features, and building systems at the particular point in time *the report is completed*.

A Conditions Assessment Report may be commissioned as a stand-alone document or as part of a more comprehensive planning activity for a historic property. As a stand-alone document, a Conditions Assessment Report may be developed in order to quantify or establish the scope of work for a preservation/rehabilitation project. In the context of more extensive preservation planning, all Historic Structures Reports should include a Conditions Assessment Report as a major component and, therefore, there are certain similarities between these two types of documents.

Considerations in Commissioning a Conditions Assessment Report

A Conditions Assessment Report should be a detailed and complete as possible recordation and evaluation of the existing conditions of a historic structure so that its content may be used to make informed decisions about remedying identified problems. However, it is primarily a visual inspection of existing conditions, including those that can be detected from the easy removal of electrical device cover plates, register covers, and access panels; and of unoccupied spaces such as roofs, attics, basements, and crawlspaces. Inspection of the latter, though, is limited by their accessibility, including safety issues and if access might result in causing damage, such as walking on clay tile roofs. Other limitations in developing a Conditions Assessment Report are the presence of floor and wall coverings, other finish treatments, or extensive furnishings. Removal of carpeting, wall coverings, furniture and cabinetry, or selective demolition to determine the condition of hidden materials is typically beyond the scope of conditions assessment activities without special arrangements and associated agreements between the parties involved.

Any limitations or obstacles to an inspection should be articulated and then addressed in the Conditions Assessment Report's recommendations as issues to be resolved. Recommendations should also be understood as providing general guidance for appropriate treatments rather than design or work specifications, which should be developed by preservation-experienced design and trades professionals.

While a comprehensive Conditions Assessment Report should always be the target document, if an adaptive or other end use for the historic structure has been determined, a preservation/rehabilitation project has already been defined, or other planning activities have occurred prior to commissioning a Conditions Assessment Report, they may influence the report's necessary level of detail. In such circumstances, a Conditions Assessment Report may be more of a documentation of existing conditions, be limited to those areas of the structure physically impacted by the preservation/rehabilitation project, or be developed to cover those issues not addressed by the other planning activities.

However, in the long term, to ensure the continued preservation and useful life of historic structures and associated resources, a Conditions Assessment Report should be one step in completing a Preservation Plan for the historic property that also includes a Historic Structures Report, property management plans, preservation project development and implementation plans, cost-of-work estimates, and funding plans. And, as with other preservation planning documents, a Conditions Assessment Report should be organized so that it provides necessary information in a manner understandable by the end user, who may not be an expert in the field.

A comprehensive Conditions Assessment Report should include:

1. Introductory information, including a table of contents; property identification information, including address, ownership, listing on historic registries, historic names, etc.; brief summary of the property's history and description of its existing setting; an executive summary, including acknowledgements, why the report is being done and for whom, current use of the property, proposed adaptive uses (if known); a summary of the methods used to create the report, etc.
2. Summary description of the building's existing condition. This description should provide a general overview of the existing conditions as an introduction to the more detailed information to follow.
3. Detailed existing condition description of the individual exterior material components: foundation, siding, brick, windows, doors, porches, trim, cornice, roof, etc.
4. Room-by-room descriptions, including documentation of interior features, finishes, and materials and detailed identification of areas of deterioration and repair for floors, walls, ceilings, doors, windows, trim, fireplaces, stairs, and other architectural features.
5. Evaluation of the physical condition of structure's materials including: masonry, mortar, roofing, trim, exterior finish materials, plaster (flat and decorative), wood floors, other wood features, finishes and millwork, fireplaces, structural elements, etc.
6. Summary description and evaluation of the building systems: electrical, plumbing, HVAC, fire protection, etc.
7. Identification and evaluation of the causes for the deterioration, decay and loss of the material components of the building. Descriptions should include location and extent of problem areas and reference associated photo-documentation.

8. An evaluation of the problems associated with the repair or replacement of the identified deteriorated areas and historic materials. Such problems could include difficult access to repair locations, necessary companion work, potential difficulty in acquiring uncommon materials, requirements for custom produced features, continuous maintenance issues, etc.
9. Recommendations for the appropriate treatment of deteriorated historic elements. Recommendations should be consistent with the Secretary of the Interior's Standards for the Treatment of Historic Properties, consider the potential impact of recommended treatments, and avoid significantly altering the property's historic character and context.
10. Existing conditions recordation information including: site plans, "as built" floor plans and elevations, detail photographs or drawings of significant features, context photo-documentation, and existing conditions detail photo-documentation.
11. Supplementary information including, as requested, applicable, and available: project scope-of-work descriptions and prioritizations, cost estimates, technical reports (including Structural Assessment Report, paint analysis, hazardous materials assessments - -lead paint, asbestos), accessibility assessment (ADA audit), summary building code issues evaluation, reference materials, archaeological investigation reports, etc.