

Special Report: Building Conditions Surveys

A professional overview of building conditions with a prioritized list of recommended repairs provides an objective framework for action and credibility to outside funders.

The roof still leaks despite two patching efforts by your contractor. The congregation wants the water-stained interior repainted and the carpet replaced. Stained glass windows are buckling. Energy costs are too high. And you need a fire detection system.

How does a building committee with no formal expertise identify problems, sort the multiple needs of its building, and deal with conflicting agendas? How can it establish a budget to plan for short- and long-term preservation goals and functional improvements? The answer is to undertake a conditions survey.

A conditions survey is an objective inspection and study of a building by a qualified preservation professional that includes a written and visual report with prioritized recommendations and cost estimates. It is the most basic starting point for taking actions, obtaining subsequent planning documents, and implementing future repairs. A good survey can help balance a congregation's programmatic goals with the needs of keeping a building sound, watertight, and safe in ways that preserve its historic character. By containing well-thought-out priorities and scopes of work, a conditions survey adds credibility to capital campaigns and funding proposals.

"A conditions survey is one of the most important planning tools a congregation can invest in," advises Ken Lustbader, Director of the Landmarks Conservancy's Sacred Sites Program. "It puts the congregation in the driver's seat by having an objective assessment of the physical condition of the property by a preservation professional who represents the interests of the religious institution."

At the First Presbyterian Church in Goshen, NY, the Board of Trustees and building committee did not have the knowledge or expertise to deal with the building-related needs of its large, 19th century masonry building. A few years ago, after spending hard-sought money on roof repairs, problems persisted. Trustee Mary Widmer suggested that the church would benefit from a conditions survey which was subsequently completed by building conservator William Stivale. "The conditions survey was a turning point for the congregation," says Ms. Widmer. "While it was difficult to get people to agree that it was needed, the survey has instilled confidence in us and is our guide for all building repairs. Beforehand, we let contractors make the decisions and found that they did not have the expertise in knowing what needed to get done."

Defining the Scope of the Survey

A survey can cover both the exterior and interior, the house of worship alone or a complex of buildings, or only the roof system if that is clearly the building's highest priority. Depending on the needs of the building, surveys by mechanical/electrical and structural engineers, a stained glass consultant a specialist in energy savings, and other consultants may be included in the report. From the survey, a scope of work can be prepared, specifications written, and bids solicited from contractors who will undertake the work.

"It's helpful to anticipate the need for secondary consultants at the outset," advises Marilyn Kaplan, AIA of Preservation Architecture, Ithaca, NY. "The lead consultant can develop the scopes of work and budget for secondary consultants, and interpret their findings in the context of the overall survey." A preliminary half-day inspection by an architect, preservation consultant, or engineer followed by a report of a few pages can provide guidance in approaching pressing concerns, and sometimes informed guesses at costs, but is not considered a true conditions survey. Neither is a proposal or recommendations from a contractor who inspected the site when evaluating a potential project.

A true conditions survey by a preservation professional typically includes the following items:

- introduction;
- inspection methodology;
- brief history of construction and maintenance;
- summary of findings;
- wdescription of existing conditions, including causes of problems;
- annotated photographs;
- prioritized recommendations;
- cost estimates;
- drawings (sketch or measured);

(optional) reports of structural engineer, mechanical/electrical engineers, stained glass consultant, or other specialists. The cost of a conditions survey can vary considerably depending upon its scope. The middle range for surveys funded by the Sacred Sites Program range from \$5,000 to \$10,000, depending on drawings, specialist consultants, and other factors. A conditions survey of numerous buildings may cost upwards of \$10,000 to \$25,000.

"Building committees sometimes expect unrealistically that a consultant can just look at a building and estimate the cost of needed work based on experience," explains preservation consultant Wesley Haynes of Argyle, NY. "It's essential to determine quantities and the correct scope of work to develop good cost estimates." This means taking time to make measured drawings and obtaining access for inspections and measurements.

If a survey budget is too small for the consultant to prepare good cost estimates, Ms. Kaplan creates separate sheets that can be removed from the report with outline scopes of work for the congregation to use in obtaining ballpark estimates from contractors. These outlines provide guidelines in contractor's language that indicate the special requirements of a preservation

project, rather than general language such as "repoint as necessary."

Funding the Conditions Survey and Choosing a Consultant

Grants for conditions surveys are available on a competitive basis from the Sacred Sites Program's new Consulting Resources Exchange, the Preservation League of New York State, and the National Trust for Historic Preservation (see Resources). When planning to fund a survey, fundraising professionals advise to ask a limited group of prospective supporters to contribute. You do not want to go to the entire congregation to fund planning documents when they will be asked to support capital improvements.

Before requesting proposals from preservation professionals, make a list of perceived priorities and purposes of the survey. Do you need a scope of work and specific cost estimates for urgent repairs? Are there a number of pressing problems, but you need to establish costs and set priorities according to your ability to raise funds? Do you want to complete a major restoration project by a milestone, such as the building's centennial? Will the conditions survey report be used primarily within the congregation for planning purposes, or it is needed to support grant proposals with specific documentation requirements?

A conditions survey can be performed by a preservation architect, building conservator, or preservation consultant. An architect who has been brought in to do a master plan typically has a building conservator or preservation consultant on the team for a conditions survey. If building code, barrier-free design, and life safety issues are part of the survey, an architect or engineer should be involved. In all cases, the person should have experience working on historic properties. Names of preservation professionals can be obtained from the Sacred Sites Program.

Check qualifications and references, review samples of comparable conditions surveys, interview the most promising candidates, and choose an individual or firm with whom you feel comfortable. Ideally, you'll build a long-term relationship with someone who understands your building and can provide services for planning future construction needs. If scopes of work and costs for services in proposals vary considerably, talk with each firm about redefining the scope and budget to fit your needs better.

Communicating Results

Effective presentation of the findings of the survey is vital to developing a consensus for action. The conditions survey report should be well-organized and easy to read by its intended audience. It should avoid excessive technical jargon, and simplify communication through annotated photographs and drawings. Many contain easy-to-read spreadsheets that list the prioritized work by year with the cost estimate. Verbal presentations of findings by the lead consultant to the building committee are customary, giving committee members an opportunity to ask questions and discuss the next steps.

Presentations for larger audiences, such as the entire congregation or multiple small groups preceding a capital campaign should be discussed in advance with the consultant. The consultant's time in making presentations should be compensated.

Many congregations can attest to the value they have received from a good conditions survey. The process of working with a preservation professional, learning the causes and interrelationships of building problems, and discovering how priorities are established mobilizes the building committee to take action. The survey report provides a framework for planning that can be consulted by anyone involved with the building for years to come. While getting a conditions survey done may seem like a lot of effort and expense, doing without one can be worse than driving in unfamiliar territory without a road map.

Initial Planning Documents

Building Conditions Survey:

A report that identifies the building's features and materials, lists deficiencies and their causes, and recommends repairs.

Purpose:

Commonly used as the basis of all future actions and subsequent documents. Provides an objective overview useful in building a consensus for action. Assists in general in obtaining grants from outside the congregation; in some cases required by funding sources.

Variations: Usually based on visual inspection, but can include physical probes if needed. Most include sketch plans and photographs. Some include measured drawings, which are necessary in estimating accurate costs. Recommendations can range from guidelines to outline specifications.

Historic Structure Report:

A report including historical research and analysis in addition to a building conditions survey. Reviewing and cataloguing historical records and images of the building provides greater insight into its evolution and alteration over time.

Purpose:

Applicable when a house of worship is of exceptional architectural or historical value, or possesses an unusual degree of integrity. Usually prepared in anticipation of restoration. Helps to interpret the history of a congregation to the community-at-large.

Variations:

The extent of historic research can range from preliminary to exhaustive depending on the need.

Master Plan:

A document and/or set of schematic plans that usually proposes(s) a change in use or reconfiguration of the building.

Purpose:

Applicable when a congregation is considering adding to or changing how a building is used.

Variations:

No standard format, but the more comprehensive ones are based on conditions reports and/or historic structure reports.

Maintenance Plan:

A report based on a conditions survey. Most identify common characteristics, quantities, estimated life-cycles, and likely problems of the building's materials and features, and instructions and schedules of appropriate repairs.

Purpose:

Used as an "owner's manual" to anticipate and prevent costly emergency repairs. Most often prepared at the conclusion of major work to keep the repaired building in good condition.

Variations:

Often arranged by material and include manufacturer's warranties and care instructions. Some are intended to be updated to include annual inspection reports and new technical briefs.

Excerpted from "Developing Priorities and Getting Started" with permission from Wesley Haynes, Preservation Consultant, Argyle, NY