

**Documentation: Completion Reports**

**Completion Reports**

Completion reports are an important aspect of the work we do at Historic New England. The completion report documents all aspects of a project including what was proposed and what was actually completed. This information is valuable both to staff today, as we analyze projects and conditions for future projects, as well as staff and scholars in the future, such that they will have a clear understanding of what interventions have occurred and why those interventions were deemed necessary.

**Completion Report Guidelines**

- The completion report should be a clear and concise description of the steps necessary to complete the project. The report can ultimately be formatted in a number of ways; however a basic table of contents is included in the Technical Information section to highlight the base level information necessary.
- It is important to note not only what work was intended but also what work was actually performed.
- Decisions made during the project should be clearly described.
- Philosophical issues should be highlighted so later staff can understand the decision making process.
- Images that contribute to the understanding of the work should be included in the completion report. The report should include a notation of where other images from the project are located.
- It is acceptable for contractors to provide components of a completion report for work performed, however staff should provide commentary with an outside completion report to further describe issues, decisions, or philosophical questions.
- Copies of both the digital and the hard copy of the completion report should be stored in their appropriate location as identified in the technical information section.

# Property Care White Papers

## Documentation: Completion Reports

### Completion Report Technical Information

A: Completing the Completion Report:

*Review required, saving the report and distribution*

B: Completion Report Table of Contents

*What a basic report should include*

#### **A) Completing the Completion Report:**

The following are steps necessary at the end of a project:

- Provide draft completion report to Team Leader, Property Care for review.
- Edit document based on review.
- Once review is complete the following distribution is required:
  - Save document as a PDF file and make 2 copies of the PDF file.
    - One copy is placed in the “AAAA Completion Reports for Archives” for storage and ultimate distribution to the archives.
    - One copy is saved in the corresponding property folder in Maintenance & Utility (M & U) sub-folder on the network drive.
  - The original document is saved to the corresponding property M & U folder on the network drive.
  - Print three copies of the contact sheet for the project related photos from Resource Space.
  - Print three copies of the report.
    - One copy and contact sheet is filed in the project folder.
    - One copy and contact sheet is filed with the completion report binder for the project.
    - One copy and contact sheet is given to the team leader for distribution to the archives.

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#### B) Completion Report Table of Contents – Annotations in italics

- House Name and Structure name
  - *The name of the house/site and structure where the work took place*
- Project Name
  - *Project Name used here should match the project name in the database*
- Date of Report
  - *The date the report was completed*
- Report Author
  - *Person writing the report*

#### Pre-Work

- Statement of Condition
  - *Describe the original conditions that necessitated the work*
  - *Include one or two images clearly showing the conditions*
- Treatment Plan
  - *This is the original scope of work for the project based on the conditions of the subject before work commenced*
- Philosophical Approach
  - *Describe the reasoning and decision making process with any preservation philosophy decisions. Common examples include changing a paint color, not replacing a wood element in-kind, or why the design of a feature was not replaced.*

#### Post-work

- Work Performed
  - *Narrative of the steps necessary to perform the actual work. This work may vary from the original treatment plan and that should be highlighted.*
  - *Images providing visual reference to the work should be included.*
- Materials
  - *A listing of all the materials used in the project.*
- Contractor (or staff involved)
  - *Identify all the contractors used for the project or identify all of the staff who worked on the project*
- Cost
  - *Total cost of the project. If it is a staff project include also the hours required.*
- Dates of work
  - *Include the starting date (month and year) and the ending date (month and year) for the project*