

Site Assessments

In order to appropriately identify, prioritize and plan for maintenance projects at properties, it is necessary to establish a baseline of conditions and clearly identify routine maintenance issues, short term repair requirements and long term preservation projects. Establishing and documenting these baseline conditions is accomplished by the focused review of current site conditions and behaviors.

While the review and progress towards identified projects and issues should occur annually, a cycle of deep review is recommended every five years.

Site Assessment Guidelines

- Create a multi-disciplinary team to inspect the property.
- Have the site staff fill out a questionnaire on the issues affecting the site.
- Put together background information for the assessment team.
- Perform the assessment and thoroughly document the process through both photographs and written notes.
- Create a written report of the assessment that includes annotated photographs and floor plans as well as a separate list of projects.
- Prioritize the project list by identifying the 5 biggest issues affecting the site and identifying 5 small projects that would make a positive impact on the daily operation of the site.

Site Assessment Technical Information

Assessment Team

The base level assessment team, or pod, will be made up of one carpenter, the preservation manager for the site, a preservation project manager and the site manager. Other team members, such as the landscape manager, may be assigned as necessary. The team leader of property care determines final decisions about assessment pod personnel. The preservation project manager is designated as pod leader and is responsible for scheduling the assessment and coordinating completion of the deliverables.

Scheduling

The basic schedule of site assessments will be determined by the team leader of Property Care. The scheduling of the steps necessary to complete the inventory and assessment on time is the responsibility of the assessment pod.

Questionnaire

A questionnaire will be distributed to the site managers. This questionnaire asks basic questions about the site and the overall conditions of the site. The questionnaire responses should be distributed to the pod members before the site visit and incorporated into the final report.

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Documentation: Site Assessments

Pre-Assessment

Leading up to the site assessment the following items should be identified to ensure a quality site visit. There are many resources available to the pod including scanned plans, hard copy plans, full size plans, project files, and project binders. If there are any doubts about the resources, please consult with the team leader of Property Care.

- Review last ten years of work at site and create a bulleted document outlining year of project, type of project and a short description of the project.
- Review all binders on shelves and create a list of resources available.
- Create copies of Floor Plans, Elevations and Site Plans in order to annotate in the field with notes.
 - If there is no digital version, a clean letter-sized copy should be identified for scanning.
 - If no small-scale plans are found, identify large format plans and secure team leader's approval for scanning.
 - If there are still no floor plans, draw basic floor plans while on site to illustrate the room configuration. Do not be concerned with scale and accuracy; these plans are considered rough field sketches.
 - If there are no elevations use façade images as stand in for elevation drawings.
 - If there are no site plans use parcel maps from town offices as base map or find other manner in which to sketch out the basic outline of the grounds.

Site Assessment

Allow for two days on site to perform the assessment. Consider allowing at least one day between site visits to allow time to write up the findings from the first day. Time in between site visits may allow additional reflection on issues facing the property and to consider issues that may have been missed. Always begin day two with a review of the first day and a discussion of the issues. Smaller sites may require less time on site so consider maximizing site visits through the addition of other local sites. Discuss additional properties with team leader of Property Care.

The assessment is not the appropriate time for destructive investigation but it is the time to identify where destructive investigation might be necessary (inspection condition of posts, sills, joists, etc). Destructive investigation, whether performed by staff or by outside contractors, should be treated as a separate project that requires team leader approval.

Floor plans should be annotated as appropriate and use room numbers approved through the Collections Access Program (Historic New England's centralized information access system). Elevations should be annotated with window numbers following standard numbering protocol if window has not yet been numbered. Site plans should be annotated as appropriate.

Report Creation/Forms

The assessment form is designed to record actual issues at the site. The hand-annotated form should be converted to digital format with photographs of issues inserted with the text.

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Documentation: Site Assessments

An inventory form providing “at a glance” documentation of key features and elements of the site should be filled out during the pre-assessment phase and during the site visit. The final inventory should be converted to digital form.

Project List

Once the assessment is completed a project list should be created. Projects may include recommendations for destructive investigation, for planning, and for action. Phasing of projects should be noted at this time as well as the auxiliary affects of the project (impacts collections, trees, etc). The entire pod should be in agreement with the project list.

From the project list five “big” projects and five “little” projects are to be highlighted. The “Big 5” projects are those which are deemed most necessary for the overall health of the building. These projects are selected without regard to anticipated cost or complexity. The “Little 5” projects are those which can return a high level of value for a relatively low level of effort.

Deliverables

On the date assigned for the completion of the assessment the following documents should be turned in to the team leader for review:

- Review of last ten years worth of work.
- Annotated floor plans, elevations and site plans.
- Completed inventory, assessment and project list.

Prioritization and Project Review

The “Big 5” and “Little 5” projects will be presented to Property Care staff and near term efforts will focus primarily on these projects. The objective of the review is to vet the project list, timing and coordination of the projects listed. As projects are completed, these top projects may require an annual or biennial review and new selection.