

**How to Hire a Contractor &  
Organize Your Building  
Rehabilitation Project**

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**Assessing Your Historic Structure**

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Conduct a visual inspection of your property. Also, be sure to research the history and style of your building or house.

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**Assessing Your Historic Structure**

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How much work you can do yourself? Should you hire a preservation architect, a preservation consultant or general contractor?

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**What Can You Do Realistically?**

Major rehabilitations take a huge amount of time and skill to manage.

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**The Skills It Takes**

Coordinating subcontractors, supplies, permits, utilities, code inspections and personalities are just a few of the skills you'll need if you take all this on yourself.

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**Assess Your Lifestyle**

Most historic building and house owners have jobs and family. These important time constraints can make it tough to manage your own project.

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### Ask Yourself These Questions

1. How experienced are you in the construction trades?

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2. Do you have experience writing professional specifications ?  
3. Do you possess an encyclopedic knowledge of codes and regulations?

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4. Do you have experience drawing blueprints?  
5. What's your willingness to handle additional stress outside your normal job and family life?

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- 6. Can you take off from your regular job for long stretches each day at the drop of a hat?
  - 7. Can you afford to take off weeks and/or months from your job during the project?

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- 8. Can you work at your job all day and then put in another 4 to 6 hours on the project?
  - 9. Can you make or take calls from suppliers & contractors while at work?
  - 10. Do you have lots of spare time?

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If you answer NO to the majority of these questions, you fall into category of "it's time to hire a preservation architect, a preservation construction consultant or a good contractor."

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### Existing Conditions Inspections

Have existing conditions inspections performed for the entire structure. You can coordinate having these inspections done yourself or hire a professional to coordinate them.

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### Structural

Hire a structural engineer who understands the nature of old and historic buildings. They'll look at every aspect of the structural integrity of your building from the foundation to the roof.

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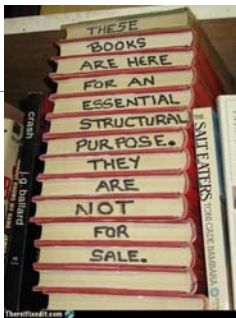
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**Mechanical, Electrical & Plumbing (MEP)**

Engineering firms can perform all Mechanical, Electrical and Plumbing inspections. They will evaluate your heating, air conditioning and ventilation systems as well as electrical and plumbing.

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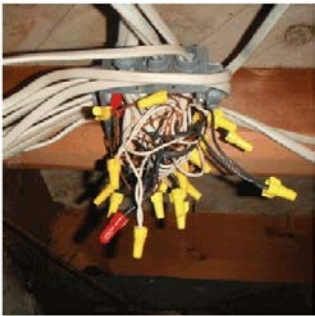
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### Roofing Consultant

A good roofing consultant must have verifiable experience with historic, commercial building roofs.

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### Masonry

Masonry consultants experienced in historic masonry will evaluate failures, mortar, moisture penetration and make recommendations. Laboratory analysis of brick, stone, stucco, concrete, paint and mortar should be a part of this inspection.

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### Chimney Flues

If you'll be using any of the existing chimneys, you'll need to hire a chimney sweep. Be sure they have a camera system they can drop into the chimney to inspect each flue you'll be using.

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### Environmental

Hire a consultant specializing in environmental inspections. They will tell you if there is asbestos, mold, lead paint or any other environmental issues pertaining to health and safety.

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**Land Survey**

If additions, parking areas or landscaping are to be done you should obtain a land survey.

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**Energy Audit**

Hire a firm that specializes in performing whole building energy audits. This will tell you where you need to tighten up the building in order to save energy.

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**Landscape**

Too often, landscaping is pushed back or not considered at all in major rehabilitation projects. Hire a landscape architect to evaluate drainage, parking, existing trees and other plantings.

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**Preservation Tax Credits**

It's smart to bring in an historic tax credit consultant to inspect up front. They will evaluate whether your building will be eligible for tax credits.

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**Americans with Disabilities Act (ADA)**

With any major commercial rehabilitation, there may be ADA issues.

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**Architectural Features**

All historic buildings have character defining, historic materials. A preservation construction consultant who is highly experienced with the preservation trades can evaluate all these features.

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**Deciding Which Professional to Hire for the Planning of Your Rehabilitation**



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**Hire a Preservation Architect (PA)**

If you go this route it is essential that you find and interview several architects with lots of historic preservation experience and listening skills.

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Good preservation architects are a different breed.

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Hire a Historic Preservation  
Construction Consultant (HPCC)

These consultants are often overlooked for small to medium sized historic commercial projects.

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A quality historic preservation construction consultant will have all the resources and contacts needed to create the specifications and blueprints for the entire project.

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An HPCC can take all of your existing conditions inspections and turn them into a working plan. They will generally have a thorough knowledge of all the different preservation trades and cutting edge best practices in the field.

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If there is structural work, you need to make sure the HPCC is working with a structural engineer who can sign off on the plans.

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### Deciding What You'll Use the Property for When Completed

For example, a commercial building may currently have retail on the first floor and empty spaces on the 2nd and 3rd floor.

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For the rehabilitation you may decide to keep retail on the first floor and have loft apartments on the upper floors.

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For a residential house you may want a bed & breakfast or rental units. Work out the basic floor plans and changes you desire with your professional.

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Decide if existing tenants can be worked around or whether the building needs to be empty to perform all the work efficiently.

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### **Working with Local Officials**

Bring in your local code, historic preservation and zoning officials. If you'll be using historic tax credits, it's a good idea to bring in staff from the Wisconsin Historical Society as well.

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Tour the officials through the building while explaining what you are planning to do. It's important to do this before creating the blueprints and specifications.

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There may be zoning, code issues or conservation issues you and your professional had not considered.

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This tour also helps develop a relationship with the folks who will be approving your tax credits, permits and conducting periodic inspections of the project.

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### Creating the Rehabilitation Plan

Now it's time for either you or your hired professional to create specifications and blueprints for the entire project. These specifications and blueprints will be the documents that guide the entire construction process.

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Every detail of the project from plumbing fixtures to cabinets to weather stripping for windows to paint colors should be decided before the final specifications and blueprints are completed.

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If you are using historic tax credits, now is the time to submit those applications to the State Preservation Office. This is also the time to apply for the project's financing with your lender.

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There will be a waiting period for approval of historic tax credits.

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Both the State Preservation Office and the National Park Service will have to review the national register status and your application before approval.

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Your historic house or building may be in a local historic district or be an individual local landmark.

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If so, it is also time to submit all your plans to the local Historic Preservation Commission or equivalent for a Certificate of Appropriateness.

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This is generally done before applying for construction permits. Check with your city or county to see what their process is for the timing of Certificate of Appropriateness versus building permits.

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### Hiring a Contractor

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For most projects of any size it is advisable to hire a general contractor unless you have the skills and time to act as the full time general for the entire project.

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A general contractor will bid the entire job and is the one person responsible to you and your professional planning expert through every phase of the project.

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The general contractor you choose will obtain all the permits, coordinate all the subcontractors and assure materials are on site as they are needed.

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The general contractor will also coordinate all necessary inspections and keep you and your professional advised throughout the project.

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### Financing and Insurance

Now is the time to ask your lender what insurance products you will need throughout the project. Close your construction loan with your lender and begin the rehabilitation.

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### Final Inspections

When the project is completed, it's time for all the final inspections. Obtaining an occupancy permit is the final local inspection you'll need.

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If you are using historic tax credits you will need a final inspection from the State Preservation Office. They will need to certify the project meets all the agreed upon criteria established before the project began.

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