

Historic Huntsville Quarterly

OF LOCAL ARCHITECTURE AND PRESERVATION

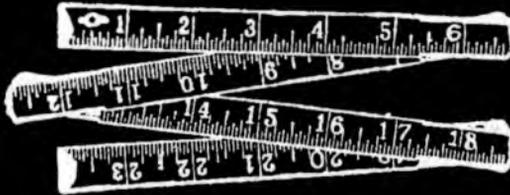
Preservation Primer

This special issue of the Quarterly is a guide for anyone who is planning to restore, renovate or add on to an historic property—especially if that property is in an historic district, where such changes are governed by preservation guidelines.



Renovating 215 Walker Avenue

VOLUME 29, NUMBERS 1-2, SPRING/SUMMER 2003
SIX DOLLARS



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Historic Huntsville Quarterly

OF LOCAL ARCHITECTURE AND PRESERVATION

VOLUME 29, NUMBERS 1-2, SPRING/SUMMER 2003

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MIKE HOLBROOK



LYNNE BERRY LOWERY

The most exciting things occur when you get a group of like-minded people together, build a working relationship based on common goals, and then ask for their ideas. It was such a pleasure for me to watch this happen with Historic Huntsville Foundation's Preservation Committee.

This group is chaired by Mike Holbrook, who also serves as vice-chair of the Foundation. Its members are Debra Brasher, Donna Castellano, Cliff Critelli, Rusty George, Marc Goldmon, Alice Lawler, Wayne Lumpkin, Michelle McMullen, David Nuttall and Deen Rice.

The committee's charge is to maintain a prioritized list of endangered properties in Huntsville and Madison County and work for their preservation. In addition, committee members are to coordinate preservation activities with other historic preservation organizations. Until this fall, that is exactly what they did. Reports were made on the status of the Freight Depot, the McCormick House, the Clemens House, and so on. Plans of action were created, assignments were made.

Until one day when everyone seemed to lift their eyes from the trees, take a step back, and really consider the forest—the overriding reasons why we were all there:

What is historic preservation and why is it important? How is it practiced in our community? Where are the gaps in knowledge and understanding?

None were naïve enough to believe that they could make preservationists of everyone they met. But they were optimistic and passionate enough to believe that they could and should pull the words out of their hearts to try to explain why historic preservation makes our community a better place to live, work and play—and to then lay out, in layman's terms, the way it works in our community.

All had experienced the frustration attendant with a lack of knowledge. They recog-

nized the confusion that exists in the minds of most historic district residents—what are all these organizations? Historic Huntsville, the Historic Preservation Commission, Twickenham, Old Town, Five Points. Which one has the power to tell me what I can and cannot do with my property, and what ARE the rules exactly?

The preservation committee is determined to see a copy of this primer, in its current format or another, in the hands of every single resident of our historic districts. Committee members' sincere hope is that they have logically and understandably described why historic districts are special and how to keep them that way. I hope you enjoy and benefit from the fruit of their considerable labor.

LYNN JONES

Spring Facelift

After twenty-five years with the same format, the award-winning Historic Huntsville Quarterly is sporting a new look. We hope you like it as much as we do.

With the objectives of a more attractive and inviting cover, better photograph reproduction, creative layout and enhanced readability, the editorial committee challenged Bruce Hiles of Designwise to come up with a conceptual design that reflected the scholarly nature of the Quarterly but also brought it into the 21st century. The Foundation board was delighted with the result of his work and has contracted with him to design and lay out the 2003 issues.

To ensure that the cost of this new professional design will not exceed the amount budgeted for Quarterly expenses Mr. Hiles agreed to a reduction in his hourly rate as a contribution to the Foundation. This generous contribution, plus the genuine interest he has shown in helping us improve the Quarterly, is deeply appreciated.

Preservation Primer a Special Issue

As noted by director Lynne Lowery, this is a special issue of the Quarterly in another way. It's a preservation primer designed not just for our members' information and enjoyment but also as a guide for anyone who is planning to restore, renovate or add on to an historic property, especially if the property is in an historic district, where such changes are governed by preservation guidelines. (Prospective buyers, for example, need to know before they purchase a property in a Huntsville or Madison historic district that guidelines must be followed and all exterior changes must be approved by these cities' local preservation commissions.) We hope that architects, builders, craftsmen, real estate agents and homeowners find the information in this primer helpful whenever questions arise about the preservation of historic properties in historic districts and elsewhere.

Contributors

While the contributors to this issue are acknowledged where their articles appear in the publication, the editorial committee would especially like to recognize Donna Castellano for guiding and pulling this important issue together from its inception and for her excellent editorial work on all the articles.

The editorial committee for this issue of the Quarterly was Diane Ellis, Lynn Jones and Patricia Ryan.

Debra Brasher has lived in Five Points for ten years and was one of the leaders in the drive to create the historic district. She is the current president of the Five Points Historic Preservation District Association, the current chair of its Multi-Media Committee and a member of Historic Huntsville Foundation's Preservation Committee.

Donna Castellano has a master's degree in history and teaches at the University of Alabama in Huntsville. She serves on the board of the Twickenham Historic Preservation District Association and on the Preservation Committee of Historic Huntsville Foundation.

Rusty George, a Huntsville native and Five Points resident, is a general contractor who specializes in the city's older neighborhoods. He is a member of the Preservation Committee of Historic Huntsville Foundation.

Marc Goldmon has a bachelor's degree in architecture from Mississippi State University and is presently serving as vice-president of the Alabama Chapter of the American Institute of Architects. Mr. Goldmon is with the Bill Peters Architecture firm. He is a member of Historic Huntsville Foundation, where he serves on the Preservation Committee. He has been involved in numerous historic restoration projects in Huntsville, including the Harvie Jones Building and the Central YMCA.

Mike Holbrook, a former general contractor, has a master's degree in education and almost 20 years of construction and renovation experience. Mr. Holbrook is a Certified Graduate Remodeler and a Graduate Master Builder. Currently, he is construction administrator and director of quality control for Fuqua Osborn Architects PC. Mr. Holbrook is vice-chairman of Historic Huntsville Foundation, chairman of the Foundation's Preservation Committee, and a resident of Old Town.

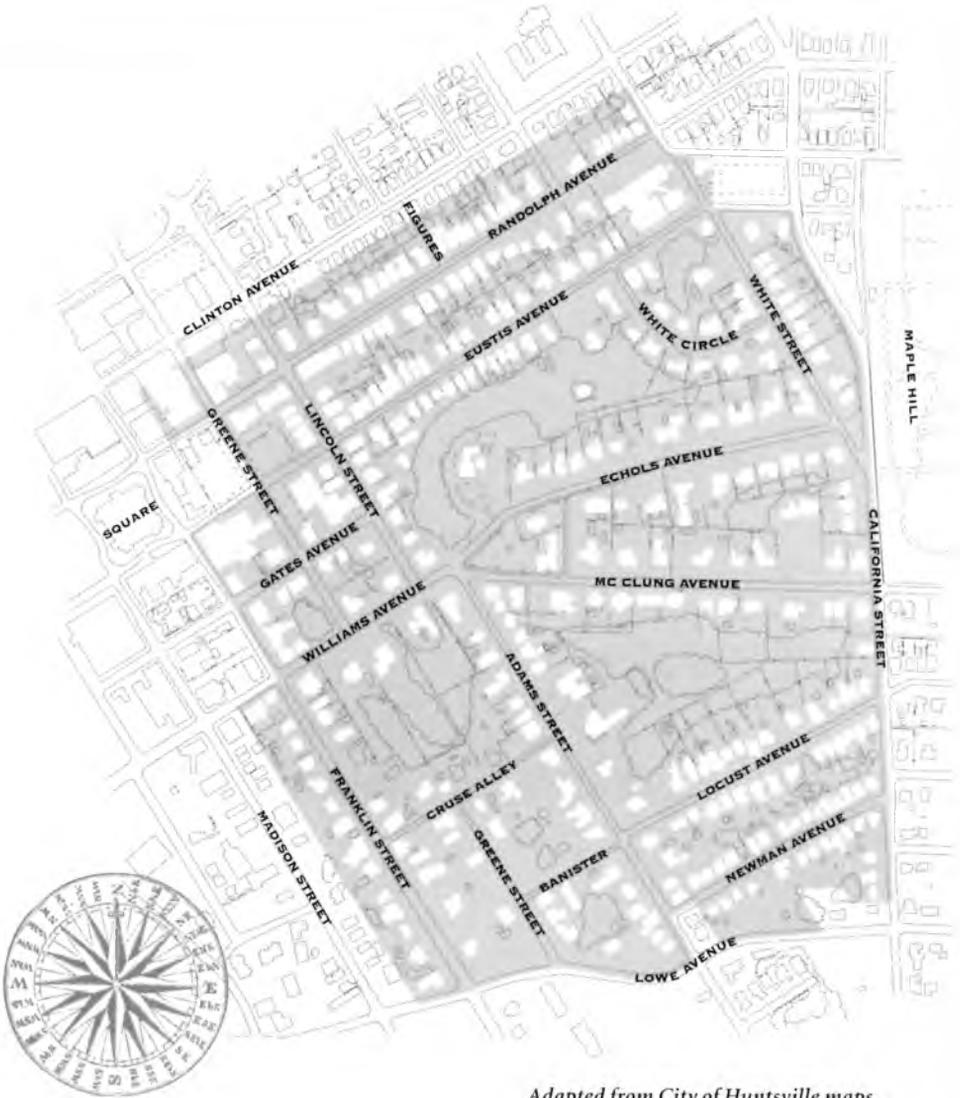
Lynne Berry Lowery is executive director of Historic Huntsville Foundation. A graduate of Vanderbilt University, she has served as a staff member for both Congressman Bud Cramer and Senator Jeff Sessions. She is a member of the Governor's Commission on Constitution Reform and a board member of the Alabama Preservation Alliance, Leadership Alabama, and United Way.

David Nuttall trained as a cartographic draughtsman in England and currently works for Intergraph Public Safety, traveling to customers to teach computer mapping techniques. He is the current president of the Old Town Historic Preservation District Association, the chairman of Historic Huntsville Foundation's Awards Committee and a member of the Foundation's Preservation Committee.

Randall Rivers is the current president of Madison Station Preservation Society. His father-in-law, Jim Carter, was one of the founding members of the society. Mr. Rivers lives with his wife Lisa and three children in a 1910 Cape Cod house, originally restored by Mr. Carter and later expanded and updated by the Rivers family.

Robert Van Peursem is a local architect and partner in the firm of SKT Architects PC, which specializes in historic preservation. He is a past president of the Old Town Historic Preservation District Association and has chaired the Huntsville Historic Preservation Commission.

Twickenham Historic District



Adapted from City of Huntsville maps

DONNA CASTELLANO

A Brief History of the Twickenham Historic District

It has been forty years since the Huntsville-Madison County Historical Society sent a letter to the Huntsville City Council expressing its concern about the rapid growth of the city and the necessity to preserve historic buildings and places. The letter recommended that “the City act by ordinance to set up a Historic Commission for the purpose of creating a zone epitomizing ‘Historic Huntsville.’ We further recommend that the ordinance provide for the preservation of the area so zoned.” The Historical Society was joined in its efforts by the Antiquarian Society of Huntsville, the Huntsville Planning Commission, and the local chapter of the American Institute of Architects, whose members volunteered to evaluate the structures to be preserved. The district boundaries were drawn to encompass many of the early architectural treasures and reflect the architectural history of the community.



403 White Street, Victorian, ca. 1893

Except where noted all photos courtesy Lynne Berry Lowery

In 1965, the Twickenham Historic Preservation District Association (THPDA) was organized to promote the creation of the district and to aid the city in acquiring the necessary legislation at the state level to permit establishment of a commission empowered to enforce regulations needed to maintain the integrity of the district. After considerable opposition from some who disliked the idea of enforced regulation, the state legislature

in 1971 passed acts which provided that when 60 percent of property owners within proposed boundaries of the district petitioned the city for its creation, the Twickenham Historic District could become a reality. On March 23, 1972, the city council passed an ordinance that gave legal status to the district and provided for the Huntsville Historic Preservation Commission of nine members charged with its oversight.

Since its creation in 1972, the THPDA has directed much of its energy toward the preservation of the Weeden House, the birthplace of Huntsville artist Maria Howard Weeden. After saving the house from plans to demolish it because of damage sustained in a house fire, THPDA restored and operated the home as a house museum. The Huntsville Housing Authority agreed to purchase the Weeden property from THPDA in 1975 so that a federal HUD grant of \$90,000 could provide the major portion of the restoration cost.

After indications that the city could no longer provide funding for the operation and maintenance costs of the Weeden House, THPDA assumed sole financial responsibility for the property in 2001. Since that time, the association has focused its fundraising activities on the house. THPDA raised \$50,000 and received a matching grant from the Alabama Historical Commission for the Weeden House in the spring of 2002. Other THPDA projects include this year's plan to create a community park and garden on the property located at the corner of White and California Streets.



413 Randolph Avenue, Greek Revival, ca. 1851

While promoting historic preservation through its stewardship of the Weeden House, the Twickenham Historic District has maintained its commitment to preserve historic architecture through the expansion of the district. In 2000, residents of Newman Avenue and of some portions of California Street and Lowe Avenue joined with THPDA and successfully petitioned the Huntsville City Council to have the boundaries of the district expanded to include property on these streets. The addition of these streets expanded the district to encompass the southeast quadrant of Huntsville as it existed in 1861.



414 Randolph Avenue, Federal, ca. 1832

Old Town Historic District



Adapted from City of Huntsville maps

DAVID NUTTALL

Old Town Historic Preservation District

The major portion of what is now Old Town was incorporated into the city in 1828. By 1861, approximately twenty-five houses, located mainly along Holmes Avenue, were present in the almost 100 acres that make up Old Town. In 1866, the east part of Old Town was incorporated into the City of Huntsville, and Walker Avenue was opened to development about 1890. Growth was encouraged because the area was within walking distance of downtown Huntsville, the Memphis and Charleston Railroad depot and the city's first cotton mill, near the depot. By 1892, Dallas Mill was located just north of Old Town, further stimulating development. The Old Town area was settled by merchants and professional people. The structures built during this time were predominately Victorian in style, of one- and two-story frame construction. Old Town is the only complete section of Huntsville that displays a true Victorian character.



127 Walker Avenue, Italianate, ca. 1889

Old Town continued to grow during the early years of the 20th century, though the Victorian building style gave way to Colonial Revivals and bungalows. The bungalow style was particularly prevalent during the 1920s and 30s. New construc-

tion declined after World War II and the area began to deteriorate as homes were converted into apartments and boarding houses. This conversion came about partly in response to the population boom Huntsville witnessed as a result of the creation of Redstone Arsenal and NASA. The development of the city's new suburbs pushed growing residential areas farther from the downtown area.

The Revival of Old Town

On September 24, 1974, the Huntsville Planning Commission sent a recommendation to the city council to create Old Town as the city's second historic district. Creation of the new district depended upon 60 percent of property owners signing a petition requesting historic district status. More than this required percentage of property owners signed the petition, and on December 12, 1974, the city adopted an ordinance formally creating the Old Town Historic Preservation District.

Exterior alterations to properties in the new historic district were now governed by the Huntsville Historic Preservation Commission. The commission did not, however, govern use, which was a zoning issue, and some areas were still not zoned for single family use. The Old Town Historic Preservation District Association adopted bylaws and became the neighborhood association organizing events, as it still does, for the community. It also serves as a voice for the community, addressing issues such as traffic speed and layout, preservation of trees and beautification, education relating to living in the district, and any concerns of district residents.



122 Walker Avenue, Victorian, ca. 1900

Expansion of Old Town

In January 1977, a portion of the 100 block of Walker Avenue was added to the Old Town Historic Preservation District and then re-zoned from commercial to residential that April, mainly in an attempt to block the construction of the Downtown Rescue Mission at the corner of Walker and Dallas. The 100 block was zoned commercial at the time and the owners had not wanted to be included in the original district. Interest in becoming part of the district ultimately prevailed,

and the Rescue Mission construction was blocked. By April 1977, the current Old Town Historic District boundaries were set.



615 Holmes Avenue, Queen Anne, ca. 1894

were residential, with only a few buildings listed as not historically or architecturally significant.

On March 28, 1980, the final legal change occurred when the city passed an ordinance changing the zoning of most of Old Town to Residence 1B, which permits only single-family dwellings.

Since that time, the Old Town Historic Preservation District has continued to see change, but mainly of restorations and renovations of the houses. Several empty

On January 31, 1978, the Old Town Historic Preservation District was nominated to the National Register of Historic Places and listed on July 18, 1978. Of the 264 structures in the district at the time of the listing, most were considered architecturally significant, and many were listed as having been built before 1910.

Of these, approximately 93 percent

lots have been built on to fill in the gaps, and a large percentage of the buildings have been improved. These improvements have led to a great sense of pride and community in the area and proved Old Town once again to be a very desirable place to live, both in terms of the feel of the place and the financial investment offered by owning a home within the district.

DAVID NUTTALL

Historic preservation and certainly historic appreciation have been issues that I have been keen on for many years. I seem to have always had a strange liking for old structures, particularly British ruins. Having moved to Huntsville about six years ago from Windsor, England, my wife and I looked to buy a house here. Jodi is from Huntsville originally. We preferred the look and feel of the historic communities, whether that was because they had a more “European” feel to them with older homes, old trees, pavements (sidewalks) and something to walk to, or because they felt like genuine America. Probably both. We found, fell for and bought an approximately 85-year-old house on Walker Avenue in the Old Town Historic Preservation District. Though it needed quite a bit of work, we both felt that the quality of the materials used in construction of older homes is superior to new homes. Friends of ours questioned the decision to buy “such an old house,” but I did not consider it “old,” as that is a relative term. The house I grew up in, in England, was built in 1860 and was not considered remotely old.

We love the area we live in and are so glad that we made that choice (even though Jodi still sometimes longs for perfectly straight walls or windows without ten coats of paint). I also like the fact that by living in an established “old-fashioned” community we are not contributing to more urban sprawl, which seems to continue spreading without what I consider as having a sense of place. One of the things that living in Old Town has helped me do is become a lot more active with regards to

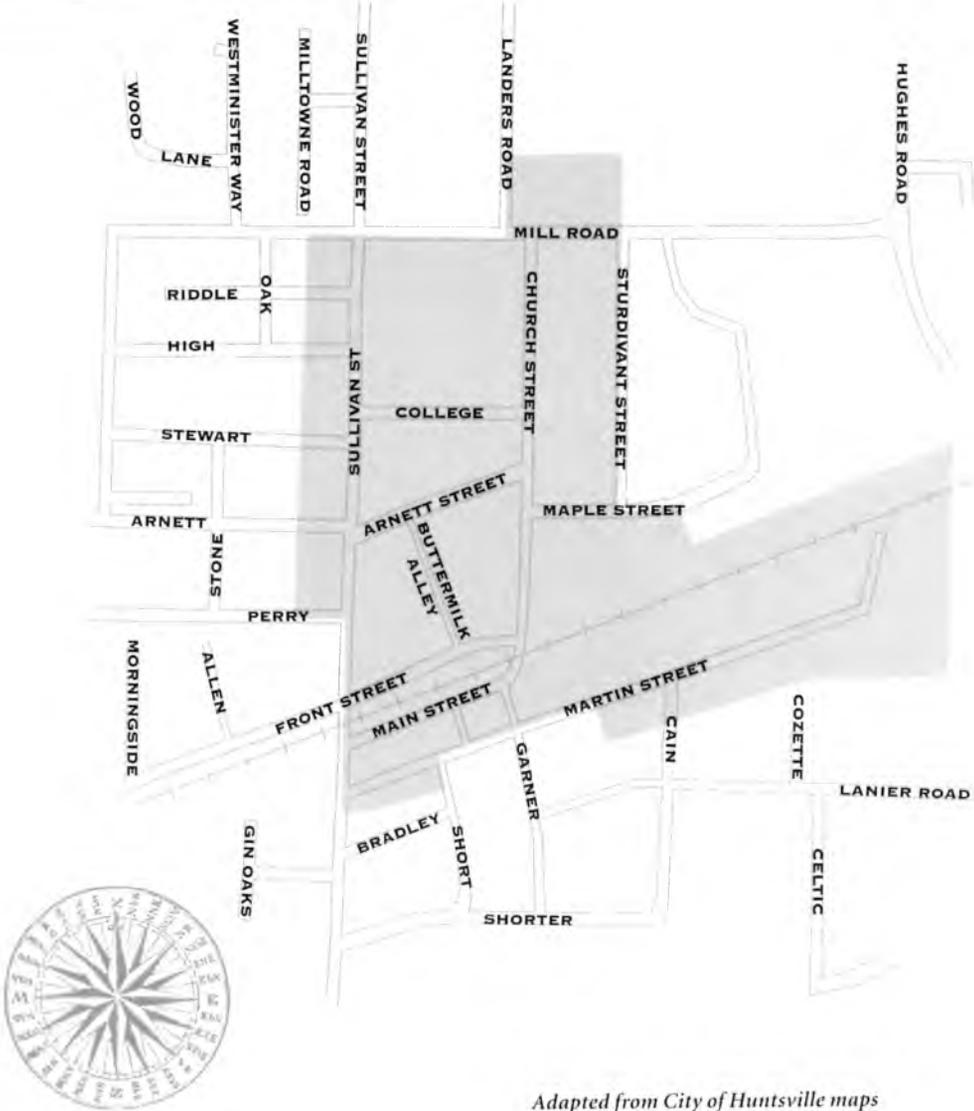
historic preservation in America, and Huntsville in particular. Through my current job I have been fortunate to travel all over the United States and see lots of towns and cities. I always try to find their old or historic downtown areas in whatever spare time I get. This has proven to me how well-preserved Huntsville's downtown is. It has also shown how much has been lost, not just here but all over America. At least Huntsville's downtown area is a safe place with a lot of the fabric intact.

On the economic side, the house has been our best investment over the last five years. We recently refinanced to take advantage of the lower rates and to get some capital to continue our renovations and changes. We have done quite a bit of the work ourselves, mixed in with contracting the parts we did not want to do or did not have the time or skill to do. Even with this extra investment in the house it is still worth more than we have in it. This is partly due to the continued improvement of the properties on Walker Avenue and the continued popularity of historic districts and the consequent rise in house values.

There is a feeling of community that permeates the Old Town Historic District that is very comforting in our modern world. It is wonderful to be able to walk through the neighborhood and see so many buildings being restored and cared for so well. Many people have invested a lot of time and money in their homes, and the rewards are more than visual improvements or a modern kitchen. The year 2003 marks the 25th anniversary of Old Town's listing on the National Register of Historic Places and there have been many changes since that time, mostly for the better. This past year I was voted President of the Old Town Historic Preservation District Association. This gives me the opportunity to work with other residents in our neighborhood to improve our community.



Madison Station Historic District



Adapted from City of Huntsville maps

RANDALL RIVERS

The Madison Station Historic Preservation Society was incorporated in 1984 to promote the renovation, rehabilitation and preservation of historic properties in the city of Madison. The Alabama Legislature in 1987 granted the City of Madison the authority to establish the Madison Historic District after the area was surveyed by the State of Alabama Historical Commission and certified compliant with its guidelines. The Madison Historic District that the Preservation Society strives to protect covers approximately fifteen city blocks and was created by the City of Madison in 1989. Most of the historic homes and buildings in the district were constructed between the 1880s and the 1940s. Architectural styles include Victorian, Colonial Revival, Craftsman bungalow, Queen Anne, Greek Revival and vernacular.

The city ordinance that created the historic district also created an Architectural Review Board that approves exterior changes to the historic structures and any new construction within the district.

The Preservation Society's fundraising activities have contributed to many improvements in the district since its creation. In 1986, it built a full-scale replica of the town's original meeting hall called the Round House. This distinctive structure sits downtown on the village green and serves as a local museum and meeting place for the society. The museum houses an extensive collection of artifacts, photos and information about the history of Madison compiled by the society's members. A compact disk containing photos and information about historic sites in Madison and the surrounding environs, and copies of Lloyd Lanphere's book *The Affair at Madison Station* (story of a Civil War battle here) are available to the public. In 2002, the society purchased beautiful gas streetlamps that were placed along Church Street. The society hopes to install these gaslights throughout the historic district. The Preservation Society meets monthly, participates in the city's annual street festival and other downtown events, and hosts an annual Christmas

tour of homes. The society is currently participating in the city's Downtown Redevelopment Committee. Madison has contracted with Auburn University's Center for Architecture and Urban Studies to develop a master plan to reinvigorate the downtown area. The society's participation will help to ensure that new development will enhance and complement the historic character of the district and not endanger any of the historic structures.

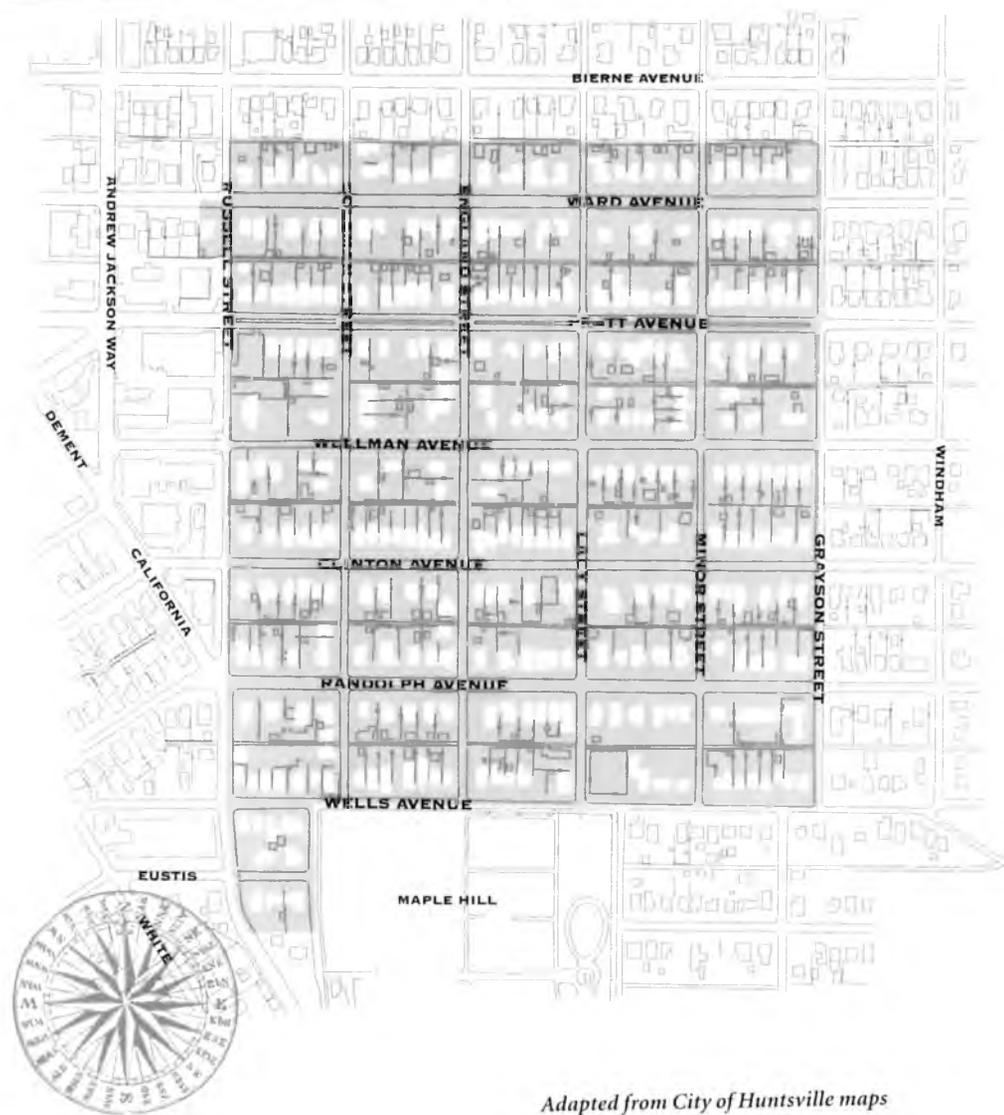


19 Front Street, ca. 1895 and 1904
Courtesy Richard Perszyk

Huntsville Historic Districts



Five Points Historic District



Adapted from City of Huntsville maps

DEBRA BRASHER

A Twentieth-Century Landmark

While Five Points residents are proud of their neighborhood's historic significance, they agree that it is first and foremost a neighborhood, a place to raise children or visit with grandchildren in an environment that provides a sense of place and character by maintaining an important link to Huntsville's past.

The Five Points Historic Preservation District is Huntsville's newest locally designated district, but it was a concept long before it became a reality. A potential Five Points historic district was first seriously considered in 1982 when the Historic Huntsville Foundation sponsored a meeting for area residents to assess whether there was sufficient interest on the part of owners to pursue the idea. The target area extended from Oakwood Avenue to Maple Hill Cemetery and from Maysville Road to Andrew Jackson Way. Petitions were circulated, but the scope was too large and proved unworkable, in part because of a large number of absentee landown-

ers. Later the target area was reduced to south of McCullough Avenue, and work began again, but the requisite number of petitions still proved elusive. The idea lay dormant until 1994 when the city again received inquiries about the procedure from several home owners. This time they succeeded in securing the necessary support by restricting the boundaries to a small area where support was most concentrated. The plan was to establish a small district that could later be enlarged.



813 Pratt Avenue, Bungalow, ca. 1921

The district was designated by the Huntsville City Council in 1999 and the following year it was expanded by the addition of five more blocks to reach its current total of 329 structures. The district currently incorporates the properties along Ward Avenue, extends south to Eustis and the north side of Wells Avenues, and runs from California/Russell Streets on the west to Grayson Street on the east.

The Five Points district is the southeastern portion of the East Huntsville Addition, which was platted in 1892 in an effort to capitalize on Huntsville's growing economy in the late 19th century. Fifty acres were donated to entice the Dallas Manufacturing Company to locate adjacent to the city. The northwestern portion of the East Huntsville Addition was developed as the Dallas mill village to provide housing for mill workers, while on the east side of what is now Andrew Jackson Way



708 Ward Avenue, Victorian, ca. 1901, with later bungalow porch

individual lots were sold to families desiring to live in the suburbs, which was made practical by the construction of a streetcar line that connected East Huntsville and West Huntsville with the courthouse square. In 1925 all of the blocks currently part of the Five Points district were annexed into the city, making it the first suburb to be incorporated into Huntsville in the 20th century.

The district is significant because it retains its 19th-century grid of broad, parallel streets with narrow but deep lots, and rear alleys. Because the area east of Andrew Jackson Way built up slowly over the course of the last century, it is a prime example of 20th-century middle-class vernacular housing choices illustrated by a

range of styles starting with a scattering of Victorian cottages, followed by a preponderance of Craftsman bungalows, modest Cape Cods, and two-story Colonial Revivals, which were succeeded by rambling ranch houses and today's infill of contemporary dwellings.

Since the district's designation, the Five Points Historic Preservation District Association has designed and erected more than thirty-five historical markers, initiated the renovation and re-dedication of the Wellman Family Park at the Five Points intersection, published an already sold-out cookbook, hung banners, sponsored a study for the improvement of the commercial core of Five Points, and established a quarterly newsletter named *The Point*.



1209 Randolph Avenue, Bungalow

RUSTY GEORGE

An Investment with Many Returns

Historic preservation districts have a reputation for being more desirable than many other neighborhoods. This perception is actually the driving force behind the success of newly formed historic districts. People see a protected area as a stable place to invest their time and money. They buy a home, improve it with confidence, and hope others will do the same. Soon, signs of positive change within a neighborhood attract others and success breeds success. Within a relatively short period of time, dozens of houses have been rehabilitated, one at a time, and an older neighborhood has been revitalized.

The perception of a neighborhood as a desirable place to live is crucial to attracting new, preservation-minded residents. Once a particular street or neighborhood begins to draw residents willing to make an initial investment in property and additional investment in restoration work, property values will begin to increase. As a recent study published in the Huntsville Times demonstrates, the value of properties located in historic districts increases at a faster rate than properties in traditional subdivisions. In fact, property values of some homes in both the Old Town and Five Points Historic Districts have doubled within the past five to ten years. Appreciation is attributable to two factors: escalated demand for the property as ownership in historic districts became more attractive to potential buyers, and the relatively low purchase prices for properties acquired by homeowners who bought five to ten years ago. These buyers got a good price on property in a transitioning neighborhood. As more and more people look for property in historic districts and demand escalates, it seems

A strong historic preservation commission is important to the success and continued viability of any historic neighborhood.

likely that many purchasers will look for property in Huntsville's other older neighborhoods—where, undoubtedly, this positive pattern will repeat itself. The role of the commission is to ensure that any development or renovation project fits the historic look of the structure and its neighborhood. This is the same process that occurs in newer neighborhoods that are governed by written covenants concerning the size, design, and placement of homes. These covenants also govern the placement and design of parking and landscaping. The ability of a neighborhood to remain desirable to potential purchasers and keep property values high often lies in the willingness of residents to adhere to the rules, and the ability and power of the authority to enforce its guidelines and restrictions.



1107 Clinton Avenue, Victorian

Alabama A&M Historic District



Adapted from City of Huntsville maps

FROM THE NOMINATION TO THE ALABAMA REGISTER OF LANDMARKS AND HERITAGE

Not all historic districts in our area are primarily residential neighborhoods. Alabama A&M University, a major educational institution in Madison County, is a locally designated historic preservation district, and it is listed on the Alabama Register of Landmarks and Heritage (August 3, 1990) and the National Register of Historic Places (December 31, 2001).

A&M, originally known as the Colored Normal School, was chartered in 1873, serving as a teacher's training school for black students. In 1891, the name was changed to the State Agricultural and Mechanical College for Negroes, and the school moved from its location in a house on West Clinton Street in Huntsville to its present location in the northeastern part of the city. A 200-acre plot on "Normal Hill" containing the Green Bottom Inn had been purchased from Henry Turner in September 1891 even though construction on Palmer and Seay Halls was already nearing completion. The reason for this discrepancy in the dates is unknown.

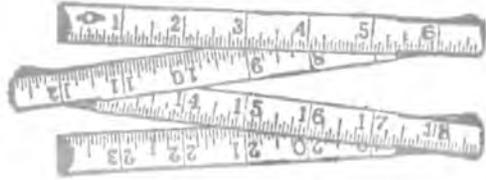
William Hooper Council, the school's founder and its president for thirty-five years, won a major fight against Tuskegee and Montgomery State to have A&M designated as a state land grant school for blacks under the Morrell Act of 1890. This recognition resulted in sharply increased funding by the state and the beginning of new building construction.

Most of the historic buildings on the campus, however, were constructed during the presidency of Joseph Fanning Drake, 1927-1962. Drake was known as "the builder" because he accomplished so much for the school, even during the Great Depression. By 1928 construction was begun on Bibb Graves Hall and the J. F. Drake Dining Hall. During his presidency Drake constructed forty-one buildings, including numerous agricultural structures, the Gymnasium-Auditorium, Hurt Hall, Hillcrest and Council Hall. Three earlier structures remain: the recently restored Carnegie Library, the Domestic Science Building, and the Virginia McCormick Hospital.

Drake also managed to acquire more than 700 acres of land for the university. In 1929 the college purchased 160.64 acres located west of Meridian Street from Frank Mastin. Another parcel of 180 acres east of Meridian Street and south of the Turner property was purchased in 1945 from W. A. Ware, and in 1954 Thomas S. Dark sold his 275.49 acres located west of Meridian Street and south of the Mastin tract to the college. In 1932 the school became an accredited junior college and in 1939 it became a four-year college. In 1949 the name was changed to Alabama A&M College, and in 1969 university status was achieved.

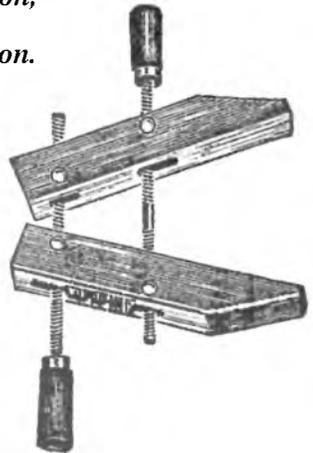


*Old Carnegie Library, Alabama A&M University, 1904 and 1946
Courtesy SKT Architects*



Part Two

This section of the Quarterly explores the meaning of historic preservation, discusses possible tax advantages, and outlines processes and techniques of historic restoration, rehabilitation and renovation.



Old “cuts” of tools are from a 1937 Belknap Hardware and Manufacturing catalog in the collection of Harrison Brothers Hardware.

MARC GOLDMON

An Overview of Historic Preservation

Historic preservation is one of those elusive terms that can mean different things to different people. In the United States, historic preservation has its roots in programs such as the Historic America Building Survey (HABS), developed during the Great Depression to put unemployed architects, photographers and draftsmen to work documenting 18th-century and early-19th-century buildings and recording their histories. Early preservation efforts focused on stately homes, typically those associated with historic persons or early presidents; however, a shift occurred in 1966 with the passage of the National Historic Preservation Act, which called for a national program to include preservation of all cultural properties. This act provided for the National Register of Historic Places. The National Register lists properties having national, state or local significance. Listings on the National Register can be individual buildings, structures, objects, archaeological sites, or districts. In Huntsville, the Twickenham Historic District, the Old Town Historic District, and Alabama A&M University are listed on the National Register.

In the present context, however, historic preservation is the act of preserving and maintaining a recognized historic building, structure, complex, or district in an attempt to learn about and keep a physical historical record for generations to come. Historic properties provide a reference to time and place that no longer exist, and the elements of historic significance may show evidence of ideas, people, values, and a specific sense of place or community that cannot be replicated.

Historic preservation projects can vary significantly in scope. These different applications can be clearly defined and are often combined in most modern projects to some degree. Each structure or building may have varying degrees of deterioration or have few original elements intact. **Although the structure or building may be in poor condition, rarely is an historic structure a total loss.** A careful evaluation by

a reputable building professional, an architect or contractor experienced in issues related to historic preservation, should be done before any material is removed from the site.

Terms and applications of historic preservation reference include the following.

RESTORATION RESTORES AND MAINTAINS ALL OR MOST OF THE ORIGINAL HISTORIC ELEMENTS.

Replacement of any material is limited and is made to match original materials. In some instances, restoration can be done to preserve a particular period, style or material to museum quality.

REHABILITATION RESTORES MOST IMPORTANT ELEMENTS AND RENOVATES BY CAREFULLY ALTERING OR ADDING TO THE ORIGINAL HISTORIC FABRIC OF THE STRUCTURE.

New construction and alteration work is limited and primarily done to meet current uses, needs or codes.

RENOVATION GENERALLY INVOLVES THE REMOVAL OF SOME ORIGINAL ELEMENTS OF A STRUCTURE AND MAKING ALTERATIONS AND/OR ADDITIONS TO MEET CURRENT USES, NEEDS OR CODES.

In severe cases after renovation, very little is retained that is historic, and usually only the facades (outside walls) and necessary structure are all that are retained. While it may look like an old structure, it's really a new building inside the old building.

The type of preservation effort made on a particular property depends on the present condition of the structure. If the structure has deteriorated because of neglect, a more aggressive approach might be needed because very little of the original structure is available to preserve, and any effort is better than the total loss of the historic structure. But most successful projects employ one or all of these applications in a balanced way to preserve and maintain the historic integrity of the structure, provide necessary modern conveniences, adhere to current building codes,

and allow for maximum use by present and future owners. As long as there are people living in an historic structure and it is being maintained properly it is being preserved for future generations.

They really “don’t build them like they used to” because the handmade craftsmanship characteristic of historic property is either no longer available or is prohibitively expensive. Moreover, the old-growth forests that produced a durable wood species used to make construction materials no longer exist. Heart pine flooring, for example, was the cheapest floor material 120 years ago, but it’s quite expensive today because it is only available through salvage.

Historic preservation also protects the environment. Restoration uses as much of the original materials as possible. Old irreplaceable wood and building materials aren’t carted off to decompose in a landfill, but whenever possible are restored and used again in the house undergoing restoration. Making a once uninhabitable old house habitable is an important form of recycling.

Historic preservation can lead to local historic district designation status, which protects and enhances property values. Historic districts protect historic properties through local ordinances that require approval of renovations, additions or alterations. A governing body reviews proposed alterations and determines whether changes to the property are in keeping with the historic fabric of the neighborhood and district. These ordinances provide protections similar to those used in new housing developments to limit inappropriate additions to the neighborhood (bad color choices, wrong architectural style combinations, bad details) or intrusive additions that overwhelm a site or historic building.

Historic preservation offers many benefits to our neighborhoods and communities. In our increasingly mass-produced, disposable culture, the materials and craftsmanship found in many older buildings are sometimes literally irreplaceable.

MARC GOLDMON AND DONNA CASTELLANO

Tax Breaks for Historic Preservation

How would you like to protect or restore your historic property, preserve the historic character of a downtown business district or neighborhood, and get a tax break to boot? Federal and state governments, and some local governments, offer sponsored tax credits to entice property owners to preserve national history.

Currently, the federal government offers a 20 percent tax credit to owners who undertake a rehabilitation project that the Secretary of the Interior designates a certified rehabilitation of a certified historic structure. This credit is limited to properties rehabilitated for commercial, industrial, agricultural, or income-producing residential purposes, but is not available for properties used exclusively as the owner's private residence. A certified historic structure is a building that is listed individually on the National Register of Historic Places OR a building that is located in a registered historic district and certified by the National Park Service as contributing to the historic significance of that district. A National Register Historic District is a district listed on the National Register of Historic Places. However, state or local historic districts may also qualify if the district is certified by the Secretary of the Interior.

There are, of course, standards that a restoration project must meet in order to qualify for the 20 percent tax credit. The Secretary of the Interior's Standards for Rehabilitation says that (1) The property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment. (2) The historic character of the property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided. (3) Each property should be a physical record of its time, place and use. Changes that create a false sense of historical development, such as adding architectural features from another

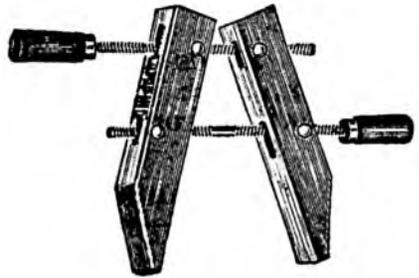
A dollar of tax credit reduces the amount of income tax owed by a property owner by one dollar.

building, will not be permitted. (4) Features that are distinctive to the period and are examples of craftsmanship will be preserved. (5) Deteriorated features will be repaired rather than replaced. (6) Chemical or physical treatments, such as sand-blasting, will not be used. (7) New construction must be compatible with historic structure, in size, scale, and architecture. (8) New additions or construction must be carried out so that if they are removed, the original structure is not damaged.

If rehabilitation is carried out according to the above requirements and has the required supporting documentation, the property owner receives a 20 percent income tax credit. A tax credit differs significantly from an income tax deduction.

An income tax deduction lowers the amount of income subject to taxation. A tax credit, however, lowers the amount of tax owed. For example, if a property owner received a \$20,000 tax credit for a certified rehabilitation, that individual's \$50,000 tax bill would be reduced to \$30,000 once the tax credit was applied.

Structures that were built before 1936 but are not on the National Register of Historic Places or are not in a recognized historic district qualify for a 10 percent tax credit. Like the 20 percent credit, the 10 percent credit is available for properties rehabilitated for commercial, industrial, or agricultural purposes. Rental housing would not qualify. Again, the 10% credit is not available for properties used exclusively as the owner's private residence.



THE WALLACE PROPERTY RELIEF CONSTITUTIONAL AMENDMENT

This allows commercial, rental, or industrial property to be assessed at the residential rate if the property is deemed historic. This amounts to a 50 percent property tax reduction from 20 percent to 10 percent of appraised value.



REQUIREMENTS FOR FEDERAL TAX CREDITS

For a 10 percent tax credit, a building —

- must have been built before 1936
- cannot be listed on the National Register of Historic Places
- cannot be in a recognized historic district

For a 20 percent tax credit, the building —

- must be individually listed on the National Register of Historic Places or have certified historic rehabilitation status as required by the Secretary of the Interior's Standards for Rehabilitation
- may or may not have been built before 1936
- may or may not be in an historic district
- must have some historic elements to preserve or maintain, and
- the rehabilitation cannot radically alter the historic character of the building
- careful documentation of the entire building — all important original architectural details and elements on the interior and exterior — must be provided

The State of Alabama also offers property tax reductions for owners of historic, income-producing property. If a building is listed on the National Register of Historic Places, either individually or as a contributing structure in a district, the owner can receive a reduction in his property tax bill.

Sound complicated? Let the Alabama Historical Commission help you navigate through this process. The commission gives preliminary approval for the 20 percent tax credits. In addition, meet with an architect who has successfully received approved tax credits. He can show you the required documentation, photographs, and additional work needed before starting any rehabilitation or renovation work on a property. **It is imperative that property owners and their contractors fully understand this process before any work begins.** Removal of any vital feature or fixture could result in the forfeiture of the 10 percent or 20 percent tax credit. It would also be wise to seek the advice of a qualified tax accountant to assess the impact of the tax credits on your personal income.

*Central YMCA, 203 Greene Street
A certified rehabilitation project*

DONNA CASTELLANO

Tax Breaks for Protecting History

Are there programs designed to give tax breaks to residential owners of historic property? Yes. Both commercial and residential property owners can sometimes receive tax breaks through the granting of an historic preservation easement.

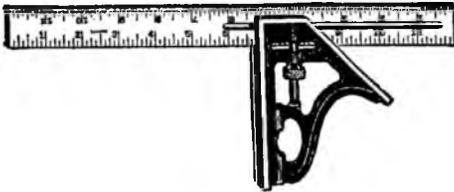
An historic preservation easement is a voluntary legal agreement made between the property owner and a qualified organization to protect a significant historic property, landscape, or archaeological site by restricting future development on the site. Normally, a property owner will convey a portion of his or her rights on the property to a qualified receiving organization such as the Alabama Historical Commission or Historic Huntsville Foundation, thereby allowing the organization the authority to enforce the terms of the easement. For tax purposes, granting a preservation easement to an organization is the equivalent of making a charitable donation to that organization.

Under an easement, the property owner conveys certain rights to the property, such as the right to alter the façade of an historic house or subdivide an historic site, but retains title to the property itself. In donating an easement to a state agency such as the Alabama Historical Commission or an organization such as Historic Huntsville Foundation, the owners agree to maintain their property in its historic condition and to forgo any incompatible development. Preservation easements are negotiated between the owner and the organization and do not require that an owner relinquish all rights to modify or alter the property. For example, an owner could grant a façade easement where he relinquishes the right to alter the street-facing portion of a residence but retains the right to alter the rear portion of the residence. Further, an easement does not preclude homeowners from making modifications to the portion of the residence with the protective easement. It does require, however, that any changes made to the structure receive the consent of the receiving agency.

How does a property owner grant a preservation easement? The qualified receiving organization helps owners with this process. The organization first determines whether the property in question is a “certified” historic property. According to the IRS, to qualify for the tax break a structure must either be listed on the National Register of Historic Places, or be located in a National Registered historic district and be certified by the National Park Service on behalf of the U. S. Department of the Interior as being historically significant to the district.

After determining that the residence qualifies, the owner then has the property appraised, preferably by an appraiser knowledgeable about historic properties. Once the fair market value has been established, the owner, in consultation with the receiving organization and a qualified real estate attorney, draws up the easement

agreement, which is then signed by both parties and recorded at the local courthouse. The owner has the property appraised again, this time with the easement restrictions in place, and the difference in value before and after the easement transaction is the dollar value of the donation.



If, for example, the difference in the appraised value of the property before and after the easement was in place was \$30,000, the property owner “donated” \$30,000 to the receiving agency and can take this amount as a charitable contribution on his income tax return.

While the granting of a preservation easement may reduce the perceived value of a residence, it is debatable whether or not a preservation easement would have any impact on the sale price of a desirable property in our local real estate market. In fact, real estate professionals knowledgeable about historic districts believe that an easement would have no adverse impact on an owner’s ability to sell a house. It is almost impossible to separate the value of a piece of historic property from the neighboring property that surrounds it. Accordingly, if easements help preserve the

integrity of our neighborhoods and help maintain the character of our districts, they will help ensure higher property values.

Easements may be the best way to preserve the integrity of our historic properties. The granting of an historic easement is an act by a property owner that preserves property not only during his ownership, but for the lifespan of the property. By ensuring that our historic districts retain their architectural character and integrity, granting a preservation easement is most certainly a gift that keeps on giving and guarantees that our distinctive neighborhoods are around to nurture and inspire future generations.

For more information about historic preservation easements, contact Historic Huntsville Foundation.

ROBERT VAN PEURSEM

Historic Districts, the Historic Commission and You

An historic district is an area designated for the protection of historic sites, buildings, landmarks, and neighborhoods that serve as a visible reminder of the history and cultural heritage of the area.

Local residents typically create historic districts in an effort to protect these landmarks, to foster civic pride, and to enhance the attractiveness of the community. Historic districts are typically created at a local level but will often be recognized at a state and national level as well. Local historic district designation and the National Register historic district program are, however, two significantly different programs that are independent of each another.

The National Register of Historic Places is a federal program administered by the National Park Service in partnership with the state governments that lists properties individually or as part of a National Register district. The State Historic Preservation Officer (SHPO) of each state administers the program for that state. In Alabama, the executive director of the Alabama Historical Commission (AHC) serves as the SHPO. The AHC is responsible for conducting state-wide surveys of historic properties, coordinating nominations of eligible properties to the National Register, and conducting environmental reviews of federal and state projects. The National Park Service makes the final decision on a property's eligibility for and listing on the National Register.

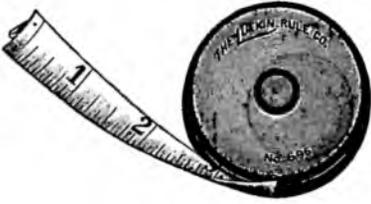
A district listing on the National Register of Historic Places is primarily honorary, acknowledging that the district has met established criteria used to determine whether it is worthy of preservation for its historic value. National Register listing does not restrict or obligate the property owner in the use of the property unless the owner is seeking federal benefits such as tax credits or grants. These types of

benefits are described elsewhere in this publication, and are usually limited to income-producing properties. However, National Register recognition provides some overview protection from federally funded or licensed programs that could adversely impact an historic property.

A locally designated historic district is one that is established by the local government as worthy of preservation and that is in compliance with specified criteria regarding its historic character. The criteria may or may not follow the same standards as the National Register requirements, depending upon the local municipality. Alabama law enables local governments to designate historic sites and districts and to establish preservation commissions to promote and protect such sites. Upon a positive recommendation from the local planning commission, the proposal to become an historic district requires a public hearing at the historic preservation commission. Then the city council adopts an ordinance designating the district. In Huntsville and Madison, the local districts are initiated by a majority of the residents within a neighborhood petitioning the city council and local historic preservation commission to form such a district.

Local preservation commissions have the option of establishing architectural review boards to review proposed changes within the district. The preservation commissions of Huntsville and Madison serve as the review boards for their respective districts. Residents within these districts must obtain a certificate of appropriateness from the review board before making any exterior changes to their property. **This pertains not only to structural changes and additions, but also to cosmetic changes such as exterior paint color, roofing, door and window replacement, fencing, and major landscaping renovations.** All projects involving exterior demolition require a certificate of appropriateness. By this process, the commission can ensure that the changes being proposed are appropriate to the special character of the district.

The process of obtaining a certificate of appropriateness sounds far more daunting than it actually is. The commissions typically meet monthly, and have an applica-



CERTIFICATE OF APPROPRIATENESS

Residents of historic districts must obtain a certificate of appropriateness from the review board before making any exterior changes to their property.

tion deadline of two weeks prior to the meeting in order to properly advertise the meeting agenda. The applicant can simply fill out the appropriate form obtained from the local inspection department and prepare enough information to convey the scope of the proposed project. That information packet typically will need to include a dimensioned site plan showing buildings, driveways and walks, fences and property lines; dimensioned floor plans and exterior elevations indicating existing and proposed construction as well as proposed building materials; and photographs of the existing conditions as well as examples of materials and design

details to be incorporated into the project. Typically, the more visual information you provide, the fewer questions the commission will have. The commission must have a visual record of the submission.

Architectural review is typically conducted with the aid of standards or guidelines. These guidelines assist the review committee in evaluating what impact the proposed addition, renovation or demolition will have on the historic character of the property as well as the district. At the conception of many historic districts, the guidelines tend to be very general in nature. As the district matures and, it is hoped, prospers, these general guidelines will need to be modified to address the new issues facing historic preservation as these landmarks adapt to meet the needs of modern society. Huntsville is currently going through such an evolution of its guidelines and hopes to have revised standards in 2003. An independent preservation consultant has been hired to update the standards with the help and input from district residents and local preservation enthusiasts.

Residents within an historic district who are planning any exterior modifications

should consult with the local inspection department to determine the requirements for a certificate of appropriateness. In most cases, a certificate is required before a building permit will be issued. In Huntsville, a building permit is required for all structural projects, and any construction over \$250 in value, with some minor exceptions for carpeting, cabinet work and painting. Madison has a \$1,000 limit with similar exceptions. Madison County currently does not have a local designated historic district requiring architectural review, but it does have a building permit requirement through its inspection department for all modifications of \$10,000. **Failure to obtain the necessary permits and certificates of appropriateness may result in a citation from the inspection department punishable as a misdemeanor and a \$500 fine. Current legislation is under consideration to make this type of violation renewable on a daily basis until the violation is corrected, making it a \$500-per-day fine.**



MARC GOLDMON

How to Hire an Architect

Historic preservation projects should not be entered into lightly. Perhaps the most critical decisions a property owner will make in a preservation project are whether to employ the services of an architect and which architect to choose. Any architect being considered for this kind of undertaking should be someone who knows and understands preservation goals and methods. Architects, in general, are not specifically trained in historic preservation unless they have earned a post-graduate degree. Most architects have developed their knowledge and experience after working with several projects over time.

In choosing an architect, you should “ask around,” starting with the local preservation organization. Then ask neighbors or other historic-property owners for their opinions. It’s best to get two or three recommendations. Ask the architect for references and verify the information with his previous clients. It’s also a good idea to request a tour of a couple of the architect’s projects to see what was done and why. Seeing a previous project of his that is similar to the scope (size, scale and complexity) of your plans might offer an excellent opportunity to learn how the architect responds and to give you an idea of his vision.

Most architects are chosen for their experience and a professional connection that is made with the client. Discuss your project with each prospective architect and get a clear understanding of what direction he might take. You might need a second meeting before you can make a final decision.

Architects’ fees vary, but they are usually based on two schedules. One is a fee based upon “percentage of construction cost” ranging from 5 percent to 15 percent, which is determined by the size, scale and complexity of the project. Another fee schedule is hourly based, usually between \$50 and \$150 per hour. Once the scope of the

project has been determined, the architect should be able to give you an approximate fee and cost for the project. Since fees can vary dramatically, the estimated fee should not be the sole factor for a decision on selecting an architect. A high or low fee may or may not indicate an architect’s level of knowledge or experience.

There are five phases of basic services an architect may provide to a client: schematic design; design development; construction documents; bidding and negotiation; and construction administration.

Schematic design is the preliminary design solution showing overall concept, size and scale of the project and usually shown with floor plans and elevation drawings.

After the schematic design phase has been approved, the second phase, **design development**, involves a more detailed review of the preliminary design.

The third—and most expensive—phase is **construction documents**, which provides the necessary construction drawings and specifications for the contractor to build by. These documents may include detailed floor plans, elevations, interior and exterior details, wall sections, finish schedules, specifications, and possibly also mechanical, plumbing, and electrical drawings. Specifications consists of a written description of materials and how they are installed. The specifications may be in book form or part of the drawings.

The **bidding and negotiation** phase uses the construction documents for bidding by potential contractors or builders. A good set of construction documents is necessary to get the benefit of the bidding process. The architect can act as an agent to provide a fair, impartial review of a proposed bid, and can guide the client if value engineering (cost-cutting) is required. It’s important to have an agent to review

A successful historic preservation project, whether a restoration, rehabilitation or renovation, requires an effective partnership between the homeowners and the professionals they employ.

information provided by the contractor, especially any cost-cutting measures, to verify that they are economically fair and do not affect the function or aesthetics of the project.

The final phase of service is **construction administration**, which coordinates and reviews periodically the construction of the project. The architect reviews the project for acceptable construction techniques and verifies that the client is getting “what he paid for.” In addition, regular site visits can help limit additional costs when changes or unforeseen problems occur.

A successful historic preservation project, whether a restoration, rehabilitation or renovation, requires an effective partnership between the homeowners and the professionals they employ. An architect who is knowledgeable about historic preservation issues and techniques can be a vital resource for property owners undertaking a preservation project.



MIKE HOLBROOK

How to Hire a Contractor

Which comes first, the designer or the contractor? When undertaking historic restoration, rehabilitation or renovation, many homeowners decide to employ the services of professional designers, such as architects, kitchen or bath designers, interior designers or draftsmen. While the professional designers provide the blueprints, it is the responsibility of the contractor to translate their vision into your reality.

When choosing an architect or designer, it's a good idea to select the contractor as early in the design phase as possible. That way the contractor can work with the designer to ensure that construction details are both buildable and affordable. Integrating the construction professional into the design process is important, as owners can often be disappointed to learn that their wonderfully designed project is beyond their budget because they lacked a realistic idea about project costs. While some renovation contractors also offer design/build services, it's advisable to also have an architect or other preservation professional involved to be sure that the project is sensitive to the historic aspects of the building.

The Quest

Choosing tradesmen or a contractor to manage the tradesmen for your preservation project can be the single most important step of the entire process. Unlike the architect or designer who may periodically visit during the construction process, the contractor will be “moving in” for the duration (and sometimes longer). The contractor and his workmen will get very intimate with the home and no doubt this will affect the family's lifestyle. While some extensive renovation projects require that the family move out, most families choose to (or must) stay in the home during the process. Therefore, choosing a contractor based solely on price, experience, craftsmanship or even a personal recommendation can be risky business. The

contractor's attention to customer service and project management can sometimes have as much impact on one's satisfaction with the final outcome as, say, attention to details on the custom cabinet work.

So just how does one go about selecting craftsmen to get the best value for the investment? First, look only for contractors who specialize in renovations, especially historic preservation projects. Just as one wouldn't want a family practice physician to do heart by-pass surgery, it's not a good idea to choose a contractor who doesn't specialize in historic renovation. It's very unlikely that a typical builder of new houses (or his subcontractors) will be the best choice for a renovation project. Experience working around existing conditions and the knowledge of how to protect them from dust and damage is a basic expectation of renovation specialists. Builders of new houses rarely have occasion to learn these methods. Further, the work site of a renovation project by day is a family's home at night, and experienced renovators understand the importance of making the home as livable as possible for the customer. For example, a renovator should clean up the work site every day—remove wood scraps, throw away food and drink containers, and sweep up dust and debris. At the end of the workday the site should be safe for a family to wander about.

To start developing a list of potential contractors with proven renovation experience, solicit recommendations from co-workers, friends and neighbors who have had similar work completed. But don't simply ask them how satisfied they were with the quality of the work. Ask them specific questions about how the process went. Did they have good communication with the contractor? Did the contractor follow the plans, or insist on his ideas? Did the contractor finish on time and on budget? Did the contractor respect their home life, and—most important—would the client use him again. Someone else's tolerance for a cluttered work site, budget overruns, schedule delays or poor communication could make your experience with the same contractor a disaster. If an architect or designer has already been selected, he might be able to recommend renovation contractors and tradesmen with whom he's had successful projects.

No matter how impressive a resume or positive a recommendation, you should never hire a building professional without first checking his credentials. Verify that all prospective contractors are properly licensed and insured to operate a construction business. Most renovations and additions require the services of a general contractor because these projects involve specialty subcontractors such as plumbers, HVAC technicians or electricians. By law, only a general contractor (or you as homeowner) may engage the services of subcontractors. You should also contact the Better Business Bureau to be sure that a potential contractor does not have unsettled claims against him. And finally, check with local trade associations (i.e., Huntsville/Madison County Builders Association) to verify membership and professional certifications. These organizations can also give you a list of professional members who specialize in renovation projects.

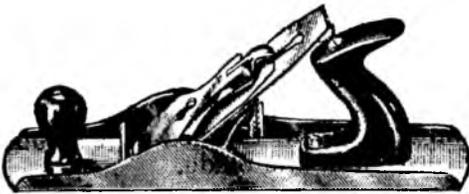
No matter how impressive a resume or positive a recommendation, you should never hire a building professional without first checking his credentials.

After narrowing the list to a manageable number, the homeowner should interview each contractor. Show him the plans so he has a general idea of the scope of the job and can determine if he is capable of and interested in doing the work. Don't get sidetracked into talking specifically about the plans or the cost of the project at this phase of the interview process. It's a mistake to focus initially on cost. Instead, take this opportunity to get to know the contractor and understand his approach to the project. You shouldn't focus on cost without taking these other factors into consideration. Ordinarily, the bidding process assumes that, all things being equal, the low bid is the best value. In renovation projects, however, the low bidder may actually be the contractor who does not have a good understanding of the project, who omitted the most work, or who found ways to cut corners.

The direction in which you take the interviews with potential contractors should

reflect your priorities. Take this opportunity to ask the contractor specific questions about issues that are most important to you. If staying on budget or finishing on time is critical, ask him how he handles changes in work or makes up lost time. The personalities of owner and contractor play an important role in communication—and communication is vital to completing a project on time, on budget and with mutual satisfaction about the finished product. (Since good communication is such an important part of this relationship, a smart contractor will also be interviewing the owners to determine whether they and their project are a good fit for his work style.) During the interview, ask for references, names, phone numbers and

addresses for at least three of his customers—one project in process, one recently completed, and one completed over one year ago. Finally, thank the contractor for his time and make the commitment to call him after talking to some of his



customers. Then call the references and get their feedback. Ask these customers the same questions you asked the friends and neighbors who gave you the referrals. Arrange to visit a job in progress to see how the contractor treats the customer’s home and lifestyle. Remember, talking about the plans in any detail at this initial interview isn’t important since you have already established that the contractors interviewed are technically capable of doing the work. What is important is finding the right match of personality and communication style.

At this point, you may be thinking, “Boy, finding the right contractor is a time-consuming process.” IT IS. But the investment of time and energy now will pay big dividends during the process and long after the dust has settled. Research has shown that the average homeowner will spend much more time on selecting a new car than on choosing a contractor. Yet the average home (usually one’s largest investment) is worth many times more than the average car. Not only will a homeowner have to deal with the contractor during the construction process, but for at least one year after the project is completed for material and services covered by

warranty. It is hoped that if you have chosen well, you won't have many problems, but it's important to know that if warranty issues occur after the job is finished your contractor will work hard to see that you remain a satisfied customer.

The Bidding Process

Although the bidding process commonly involves getting at least three bids from prospective contractors, it's important to allow personal preference to guide this process. Some people follow the traditional method of accepting competitive bids while others choose a contractor and then negotiate a price. Competitive bidding is based on the premise that the best value is achieved when you have contractors submit bids based on the same set of complete plans. This may be an effective approach when building a new building, but in a renovation project there are always unknowns. Contractors know this. **Accordingly, a contractor may submit the lowest bid to win the job, but know that ample opportunity exists to increase his profit throughout the course of the project with change orders.** In the long run, though it may not prevent change orders, negotiating a contract with a contractor that best fits the project and personality of the owner may provide a less stressful renovation and cost less as well.

The Agreement

Once a contractor has been chosen and you have reached an agreement on price and terms, be sure that all agreements are in writing. Any reputable and professional contractor will provide a written construction agreement (contract). If an architect is involved, the agreement may be a standard AIA Owner/Contractor agreement. In either case, the agreement should have as much detail as possible and include the following:

SCOPE OF WORK Type of work, extent of work, where work will take place.

SPECIFICATIONS Details such as materials used, including brand names, model numbers, sizes, colors, etc., and how materials are to be installed.

BUILDING CODES The agreement should state that all work will be performed in accordance with all applicable building codes and local ordinances. The contractor, not the owner, should purchase the permit.

INSURANCE The agreement should include requirements for contractor's insurance. General liability coverage, at a minimum, is required, and in some instances, Builder's Risk also.

FINANCIAL ARRANGEMENTS These include the total cost of the project and how much and when payments will be made to the contractor. Contractors rightfully require up-front payments (up to 25 to 30 percent of the cost) to show good faith on the owner's part so they can schedule crews, stage equipment and order materials without risk of loss. However, never pay more than a 50 percent up-front payment and never pay any amount up front without a written agreement.

CHANGES OR ADDITIONS TO WORK Any work that is not described in the original agreement will require a change order. This change may involve replacing a rotten floor joist that is encountered or performing additional work you decide to do in another part of your home. The changes, including the details and cost of such changes, should also be in writing and signed by both parties. Both parties should receive a copy.

THE SCHEDULE The agreement should include a schedule or at least a starting and completion date. Some agreements have incentives for early completion as well as penalties for schedule overruns.

WARRANTY The agreement should specify what work and materials are warranted and for how long.

Warning Signs

We've all heard stories of disreputable contractors who take off with a homeowner's money, leaving him stranded in a half-completed, shoddy renovation.



Unfortunately, these stories scare scores of people away from buying and renovating older property because they fear they might fall prey to some contractor's scheme. To avoid this scenario, you need to be able to recognize the warning signs exhibited by "shady" contractors. Avoid any contractor or tradesman if any of the following situations arise.

You can't verify the name, address, telephone numbers or credentials of the prospective contractor. Don't settle for a post office box number or a cell phone or pager number.

The salesperson tries to high-pressure you into signing by offering you discounts or other considerations that are "only available today."

You are told you will receive a special low price.

The contractor does not comply with your request for references or the references have reservations about the contractor's work.

You are unable to verify that the contractor is properly insured.

You are asked to purchase the building permit for any reason. There is no legitimate reason for the contractor not to buy the permit.

You are asked to pay for the entire job in advance or to pay cash to anyone instead of by check or money order to the company itself.

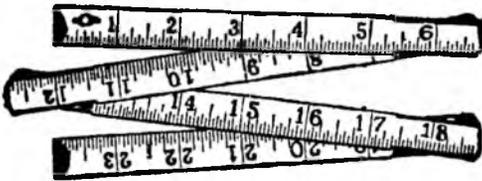
The contractor tells you he can start on your project tomorrow.

The Most Important Thing to Remember about a Preservation Project

Quality pays—it doesn't cost. Your home or business is probably your single largest investment. Choose your projects and contractor wisely for the best return on your additional investment in your home or business. Renovations and additions can cost more per square foot than new construction. There is no average square foot cost for renovation. No two projects involve the same amount of work, materials or

details. What does a car cost per pound? It depends on whether it's a Mercedes or a Hyundai. Regardless of the extent of your restoration, you should not undertake a preservation project on an historic property with an unrealistically low budget. Your budget should be flexible enough to fix structural or system problems uncovered by the renovation, or to make cosmetic improvements such as upgrading fixtures or finishes. You might decide that, with all the workers there anyway, it's a good time to have work done in other parts of the house. It's been said that the bitterness of poor

quality long outlasts the sweetness of a cheap price. The lowest bid does not assure you of the best deal. Look for the best value—not the lowest cost.



QUALITY PAYS — IT DOESN'T COST.

MIKE HOLBROOK

Materials and Building Methods That Preserve Your Home's History

Preserving, restoring or renovating an old building poses many challenges and usually requires a high commitment of time, energy and money. Whether you're doing minor repairs, major renovations, or a certified historic rehabilitation, you'll need to give serious consideration to the materials used and their methods of installation. Using the right materials and methods is key to the project's success and will affect costs and durability of the finished product. Generally, the architect will specify (choose) the products, while the contractor is responsible for the means and methods of construction.

Modern technology, new material types, and tradesmen skill levels have changed the way buildings are constructed today. New technology, however, is not always compatible with historic buildings. Modern brick and mortar, for example, are harder and more water resistant than their historic counterparts, but using them in combination with old hand-made brick and lime putty mortar on an exterior wall can be a recipe for disaster. Modern Portland cement mortar cures much too hard and will often cause serious damage to the much softer historic brick. Unfortunately, many of the materials originally used on historic buildings are not widely available today. Old-growth forests that yielded tight, straight grain wood are all but depleted, and original materials that are now salvaged from demolition projects to be re-used on historic buildings often carry an expensive price tag.

There are superior manufactured building products today, but many of these new products are inappropriate for use in historic buildings. No doubt vinyl siding, fiber-cement board (Hardie board) and even plastic composites require less maintenance than the traditional wood siding and trim. But their use on historic buildings would generally be inappropriate and generally not acceptable to an historic review

commission. Incorporating new windows into an historic building also presents a challenge. Replacement windows are available in everything from traditional wood to aluminum and vinyl-clad wood and 100 percent vinyl and fiberglass products.



Again, except for wood, these products, with few exceptions, might not be appropriate for historic restoration projects or acceptable to historic commissions. Fiberglass and stamped metal panel doors found at most home centers might also be inappropriate.

In many ways, though, modern materials and technology can make restoration easier and offer better performance over conventional materials. Polyurethane floor finishes, for example, are superior to the old-time varnishes and give the luster of authentic oils. Latex (100 percent acrylic) paint is much better suited and will generally last longer on exterior wood trim and siding than older oil-based paints. And latex paint is a better choice for plaster walls and ceilings than oil. However, alkyd oil paint for interior trim is still preferred for its authentic look, smooth luster and durability over latex. New roofing materials are perhaps the major departure from traditional materials that are nevertheless often considered appropriate and acceptable to historic commissions' review. Modern roofing products such as laminated asphalt shingles (architectural or dimensional) and plastic and fiberglass composites, which mimic the look of slate and wood shake shingles, are finding wide acceptance in historic projects, partly because of the relatively inexpensive cost compared to authentic slate, wood shake or stamped and standing seam metal roofing. Plaster walls have all but gone away in favor of gypsum wall board (often referred to as drywall or Sheetrock) because of ease of installation, value, and the problem of finding skilled plaster masons. Drywall might not be appropriate in a certified historic rehabilitation project, however.

But before considering specific materials, you and your professional team must make a decision about your commitment to historic restoration or rehabilitation. Too often renovation projects that aren't sensitive to materials and methods actu-



ally destroy historic properties. Many owners, architects and contractors today feel the **only** approach to a dirty outdated building is to gut the interior to bare studs and build anew. For today's homeowners, making an old house attractive, comfortable and energy efficient is the goal of most rehabilitation. While most older homes do require major upgrades to bring them into the 21st century, total gutting of a house can often be a huge, unnecessary and very expensive mistake. Unfortunately, this method seems to be preferred because design and construction is much easier than working around existing elements. Certainly, this approach makes it "easy" for architects and tradesmen because it allows for unrestricted space planning as well as a way to correct any structural defects since they can expose all structural members. Plumbing, heating and air conditioning and electrical upgrades are easy, and exterior walls can be readily brought up to current energy standards.

This gutting and rebuilding is the most costly approach to renovation, however, and is definitely NOT preservation; indeed, it can hardly be called restoration. While the exterior walls may remain intact and the street face may remain largely unchanged, the gutting approach should be called "taxidermy preservation." Only the outside "skin" remains. It looks like preservation or restoration on the outside, but the original life of the house is gone (and much of the character as well).

In almost every case, installing new electrical, plumbing and HVAC systems **does not** require gutting. And, in almost every case, gutting will initiate the full enforcement of current building codes and standards. For example, consider a home that has a period Victorian staircase with a 30-inch high balustrade that needs repair. If the builder simply repairs the balustrade, the balustrade is likely to remain. But if the balustrade is removed to relocate the staircase, the builder may have to meet the current code-required height of 42 inches, thus destroying the historic Victorian element. Generally, any part of an existing building that is not directly affected by the renovation may be grandfathered and remain in use. This can also apply to any

mechanical, plumbing or electrical element.

Many builders will recommend replacing plaster walls with “Sheetrock” so that piping, wiring or insulation can be easily installed. Plaster walls, however, do not have to be ripped out to get piping, wiring or insulation in the wall. Even portions of beaded board on walls and ceiling can be removed and easily replaced. There are many effective techniques renovators can use to upgrade systems in an old house without compromising its historic integrity.

PLUMBING can often be upgraded with only small portions of a plaster wall removed for access.

NEW ELECTRICAL AND COMMUNICATION CABLES can be snaked between studs and joists to upgrade existing wiring or to add new devices without destroying the walls and ceilings.

NEW MECHANICAL SYSTEMS exist that require only 2-inch ducts that can easily be fitted between floors, walls and ceilings.

WINDOWS can be upgraded with new insulated sashes and balances without the expense of both interior and exterior repair work needed for wholesale window replacement. The existing jambs and interior and exterior trim remain in place, saving time, costs, and most important, often the original trim. Space-age polymer wood fillers are available today to re-consolidate rotten, damaged wood without wholesale replacement.

INSULATION can be “blown” into wall cavities by boring 2- 3-inch holes between each stud or joist. While providing the customary insulating qualities, blown-in insulation can also provide an effective air barrier because it’s so tightly packed. In fact, blown-in cellulose offers the additional benefit of being vermin repellent.

SAGGING FLOORS AND WALLS can be jacked up slowly—over a period of a few weeks—without doing serious damage to plaster and structure.

PLASTER WALLS AND CEILINGS can then be patched and repaired for a seamless appearance. Polymer modified “paints” along with a fabric scrim can be applied to plaster to bridge and cover cracks without having to remove and replace with drywall. An added benefit of keeping plaster walls and ceiling is the capacity of the cement to act as a “thermal mass” helping to moderate temperature swings, and thus providing a more comfortable home.

A “VAPOR BARRIER” can be achieved by applying a “perm-rated” primer on the interior walls and ceilings.

REMOVING INTERIOR DOORS OR PORTIONS OF WALLS to enhance circulation between adjoining spaces can give an old home an open, airy feel without destroying the charm and character of the original floor plan.

These are but a few techniques that will allow TOTAL systems upgrade while retaining most of the original interior elements. Instead of gutting, consider leaving as much of the original interior walls as possible. Can making an old house look like a new house inside really do justice to its heritage?



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The Foundation **owns and operates** Harrison Brothers Hardware. **Owns and leases** the Harvie Jones Building. **Operates** a warehouse of architectural artifacts and materials for reuse in historic preservation. **Publishes** *The Quarterly of Local Architecture and Preservation*, 2001 winner of the Alabama Historical Commission's Exceptional Achievement Award, and *The Foundation Forum*, a quarterly newsletter. **Provides** complimentary information and consultation on the tax credits available for the restoration of historic income-producing property.

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