



AIA[®] Document B205[™] – 2007

Standard Form of Architect's Services: Historic Preservation

for the following PROJECT:
(Name and location or address)

THE OWNER:
(Name, legal status and address)

THE ARCHITECT:
(Name, legal status and address)

THE AGREEMENT

This Standard Form of Architect's Services is part of or modifies the accompanying Owner-Architect Agreement (hereinafter, the Agreement) dated the _____ day of _____ in the year _____
(In words, indicate day, month and year.)

TABLE OF ARTICLES

- 1 INITIAL INFORMATION
- 2 HISTORIC PRESERVATION SERVICES
- 3 ADDITIONAL SERVICES
- 4 OWNER'S RESPONSIBILITIES
- 5 COMPENSATION
- 6 SPECIAL TERMS AND CONDITIONS

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

This document provides the Architect's scope of services only and must be used with an owner-architect agreement. It may be used with G802[™]-2007, Amendment to the Professional Services Agreement, to create a modification to any owner-architect agreement.

ARTICLE 1 INITIAL INFORMATION

The Architect’s performance of the services set forth in this document is based upon the following information. Material changes to this information may entitle the Architect to Additional Services.

(List below information, including conditions or assumptions, that will affect the Architect’s performance.)

ARTICLE 2 HISTORIC PRESERVATION SERVICES

§ 2.1 The Architect shall consult with the Owner, research applicable criteria, attend Project meetings, communicate with members of the Project team and issue progress reports. The Architect shall coordinate the services provided by the Architect and Architect’s consultants with those services provided by the Owner and Owner’s consultants.

§ 2.2 The Architect shall prepare, and periodically update, a schedule of Historic Preservation Services that shall identify milestone dates for decisions required of the Owner, services furnished by the Architect and completion of documentation to be provided by the Architect. The Architect shall coordinate the Historic Preservation Services schedule with the Owner’s Project schedule.

§ 2.3 The Architect shall assist the Owner in connection with the Owner’s responsibility for filing documents required for the approval of governing and reviewing authorities having jurisdiction over the Project.

§ 2.4 The Architect shall submit historic preservation documentation to the Owner at intervals appropriate to the process for purposes of evaluation and approval by the Owner. The Architect shall be entitled to rely on approvals received from the Owner to complete the Historic Preservation Services.

§ 2.5 The Architect shall provide only the services specifically designated below as the Architect’s responsibility. The Architect shall perform the designated services in accordance with a service description located in Section 2.6 or in an exhibit attached to this services document.

(Designate the services the Architect shall provide in the second column of the table below. In the third column indicate whether the service description is located in Section 2.6 or in an exhibit attached to this services document. If in an exhibit, identify the exhibit.)

Services	Responsibility (Architect, Owner or Not Provided)	Location of Service Description (Section 2.6 below or an exhibit attached to this document and identified below)
§ 2.5.1 Existing Facilities Surveys		
§ 2.5.2 Preliminary Survey and Work Plans		
§ 2.5.3 Documentation of Existing Conditions		
§ 2.5.4 Condition Survey		
§ 2.5.5 Structural Investigation		
Survey		
Analysis		
Physical Testing		

Services	Responsibility (Architect, Owner or Not Provided)	Location of Service Description (Section 2.6 below or an exhibit attached to this document and identified below)
Other:		
§ 2.5.6 Seismic Investigation		
§ 2.5.7 Electrical and Mechanical Survey		
§ 2.5.8 Codes, Regulations and Standards		
§ 2.5.9 Selective Demolition		
§ 2.5.10 Paint Analysis		
Optical Microscopy		
Chemical Analysis		
Deterioration Analysis		
Other:		
§ 2.5.11 Landscape Analysis		
§ 2.5.12 Fabric Analysis		
§ 2.5.13 Mortar Analysis		
§ 2.5.14 Biological Analysis		
§ 2.5.15 Test Samples		
§ 2.5.16 Archival and Literature Search		
§ 2.5.17 Building Conservation		
§ 2.5.18 Archaeological Research		
§ 2.5.19 Building Chronology		
§ 2.5.20 Historic Structure Report		
§ 2.5.21 Cyclical Maintenance Plan		
§ 2.5.22 HABS/HAER Documentation		
§ 2.5.23 Historic Register Nominations		
Local Landmarks		
National Register of Historic Places		
National Register of Historic Districts		
National Historic Landmark		
Other:		
§ 2.5.24 Historic Preservation Certification/Tax Incentives		
§ 2.5.25 Section 106 Review Process		
§ 2.5.26 Guidelines for Historic Preservation		
Construction in or adjacent to a Historic District		
Work on specific site or structure		
Appropriate use of historic structures		
Other:		
§ 2.5.27 Grant Proposals		
§ 2.5.28 Conservation Assessment Program		
§ 2.5.29 Historic Building Preservation Plan		
§ 2.5.30 Interpretive Program		
§ 2.5.31 Awards Submittal		
§ 2.5.32 Preliminary Cost Estimate		
§ 2.5.33 Programming (B202™-2009)		
§ 2.5.34 Site Analysis and Selection		

Services	Responsibility (Architect, Owner or Not Provided)	Location of Service Description (Section 2.6 below or an exhibit attached to this document and identified below)
§ 2.5.35 Concept Design		
§ 2.5.36 Economic Feasibility Study		
§ 2.5.37 Geotechnical		
§ 2.5.38 Land Survey		
§ 2.5.39 Civil Design		
§ 2.5.40 Landscape Design		
§ 2.5.41 Environmental Study		
§ 2.5.42 Contractor Qualifications		
§ 2.5.43 Materials Restoration		
§ 2.5.44 Other:		

§ 2.6 Description of Services

A brief description of each Historic Preservation Service is provided below.

(If necessary, provide in Section 2.7 expanded or modified descriptions of the Historic Preservation Services listed below.)

§ 2.6.1 Existing Facilities Surveys. Conduct an Existing Facilities Survey for the Project. The Survey may include review of building uses, conditions of existing materials, systems review, code review and accessibility issues.

§ 2.6.2 Preliminary Survey and Work Plans. Describe the physical appearance of the property in general terms and evaluate its level of integrity, physical condition, probable historical significance and recommend a historic preservation work plan.

§ 2.6.3 Documentation of Existing Conditions. Provide a record of the property as it exists, which may include measured drawings, field notes, photographs or other means of documentation.

§ 2.6.4 Condition Survey. Describe the general condition of the Project and identify the locations of areas of concern.

§ 2.6.5 Structural Investigation. Investigate the structure of the building as designated in Section 2.5.5. The survey will determine the elements of the existing structural system. Analysis of the structural capabilities of the system will be done by visual and capacity calculation methods. Physical testing shall be done by structural loading or other testing methods.

§ 2.6.6 Seismic Investigation. Determine the seismic requirements of the building, compare the building to the required seismic code and recommend procedures to upgrade the building to meet the requirements.

§ 2.6.7 Electrical and Mechanical Survey. Prepare a survey of the existing electrical and mechanical systems.

§ 2.6.8 Codes, Regulations and Standards. Identify applicable codes and regulations. Describe how the codes apply to the building and site, and make recommendations for life safety, access for people with disabilities and regulatory compliance.

§ 2.6.9 Selective Demolition. Remove portions of the structure or designated materials to determine hidden materials or elements. Provide recommendations of areas to be demolished to the Owner for approval prior to commencement.

§ 2.6.10 Paint Analysis. Analyze designated areas of painted surfaces for color match, sheen, stencil patterns and chronology by optical microscopy, chemical analysis for composition or deterioration or other testing as designated in Section 2.5.10.

§ 2.6.11 **Landscape Analysis.** Prepare a survey of existing conditions and historic significance of landscape design, features and other site considerations.

§ 2.6.12 **Fabric Analysis.** Analyze the materials, workmanship and equipment of the structure in relation to their physical nature, sources and dates of construction.

§ 2.6.13 **Mortar Analysis.** Provide chemical analysis for mortar composition. Determine historical compositions and compressive strength. Provide recommendations for matching the historic mortar with available materials.

§ 2.6.14 **Biological Analysis.** Analyze biological growth by optical microscopy. If other types of testing are required, list under Section 2.7.

§ 2.6.15 **Test Samples.** Procure samples for testing of materials. Destructive testing may be required to obtain the samples. Test samples may include cleaning samples, paint color samples, brush-outs, mortar samples, trim or detailed mock-ups. List the tests to be performed under Section 2.7.

§ 2.6.16 **Archival and Literature Search.** Locate, identify and assemble original drawings, historic photographs and written accounts or descriptions that will aid in tracing the development of the structure through its history.

§ 2.6.17 **Building Conservation.** Investigate the building relative to changes in structure, materials and composition to minimize further deterioration. Recommend procedures to minimize further deterioration.

§ 2.6.18 **Archaeological Research.** Investigate the Project area below ground to recover, protect and evaluate artifacts and determine periods of occupation and use.

§ 2.6.19 **Building Chronology.** Trace the development of the structure through its construction periods, ownership and uses.

§ 2.6.20 **Historic Structure Report.** Prepare a Historic Structure Report (HSR).

§ 2.6.21 **Cyclical Maintenance Plan.** Prepare a Cyclical Maintenance Plan as defined under Section 2.7.

§ 2.6.22 **Historic American Building Survey/Historic American Engineering Record (HABS/HAER) Documentation.** Provide measured drawings, field notes and photo documentation of the historic structure in its current condition, prior to any new additions or alternations. Prepare in the format prescribed by the Library of Congress Historic American Building Survey/Historic American Engineering Record. Assemble original documentation for donation to the Library of Congress collection.

§ 2.6.23 **Historic Register Nominations.** Prepare and submit the required forms to nominate the site or structure as designated in Section 2.5.23 and respond to inquiries of reviewing bodies.

§ 2.6.24 **Historic Preservation Certification/Tax Incentives.** Prepare and submit the historic preservation certification application using the Secretary of the Interior Standards for the Treatment of Historic Properties. Respond to the governing authority's comments. Prepare forms for certification of completion. The Owner shall provide necessary legal, tax and accounting services.

§ 2.6.25 **Section 106 of Secretary of the Interior Standards for Rehabilitation Review Process.** Prepare submittals for the Agency to submit, respond to governing authority and make recommendations regarding compliance with the Secretary of the Interior Standards for the Treatment of Historic Properties.

§ 2.6.26 **Guidelines for Historic Preservation.** Prepare historic preservation guidelines for the type of project designated in Section 2.5.26. The limits of the physical boundaries to which the guidelines apply are to be recommended by the Architect and approved or defined by the Owner.

§ 2.6.27 **Grant Proposals.** Prepare submittals for the Grant Proposal. Respond to governing authorities and make recommendations to the Owner regarding method, proposed scope of work and budget. The Owner shall provide legal and accounting services as requested by the granting agency.

§ 2.6.28 **Conservation Assessment Program.** Prepare a Conservation Assessment Program (CAP) as set forth by the National Institute for the Conservation of Cultural Property.

§ 2.6.29 **Historic Building Preservation Plan.** Prepare a Historic Building Preservation Plan in accordance with General Services Administration (GSA) guidelines.

§ 2.6.30 **Interpretive Program.** Provide an interpretive program of the site and buildings for the public's use.

§ 2.6.31 **Awards Submittal.** Prepare a submittal for the awards as prescribed in competition requirements. Specific awards shall be itemized in Section 2.7.

§ 2.6.32 **Preliminary Cost Estimate.** Provide a preliminary cost estimate of the Cost of the Work based upon information determined from services performed with this Agreement. This estimate may be based on current area, volume or similar conceptual estimating techniques.

§ 2.6.33 **Programming.** Prepare a program which will describe how the property will be used in the future and determine physical space requirements, relationships of the spaces, preservation treatments and how the proposed use will preserve the historical integrity of the building and site.

§ 2.6.34 **Site Analysis and Selection.** Provide an analysis of a site or sites designated by the Owner. Analysis may consist of on-site observations, movement systems, traffic and parking studies, topography analysis, and analyses of deed, zoning and other legal restrictions, studies of availability of construction materials, equipment and labor and construction markets.

§ 2.6.35 **Concept Design.** Provide a Concept Design, which may include a conceptual approach to preservation of the building and design concepts for functional use.

§ 2.6.36 **Economic Feasibility Study.** Prepare an economic analysis of the Project, which may be based upon estimates of the total Project cost, operation and ownership cost, financing requirements, cash flow for design, construction and operation, return on investment and equity requirements.

§ 2.6.37 **Geotechnical.** Provide services of geotechnical engineers, which may include, but are not limited to test borings, test pits, determinations of soil bearing values, percolation tests, evaluations of hazardous materials, ground corrosion tests and resistivity tests, including necessary operations for anticipating subsoil conditions, with reports and appropriate recommendations.

§ 2.6.38 **Land Survey.** Provide surveys to describe physical characteristics, legal limitations and utility locations for the site of the Project, and a written legal description of the site. The surveys and legal information shall include, as applicable, grades and lines of streets, alleys, pavements and adjoining property and structures; adjacent drainage; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the site; locations, dimensions and necessary data with respect to existing buildings, other improvements and trees; and information concerning available utility services and lines, both public and private, above and below grade, including inverts and depths. All the information on the survey shall be referenced to a Project benchmark.

§ 2.6.39 **Civil Design.** Study alternate materials and systems and develop conceptual design solutions for on-site utility systems, fire protection systems, drainage systems and paving.

§ 2.6.40 **Landscape Design.** Study alternate materials, systems and equipment and develop conceptual design solutions for land forms, lawns and plantings, physical site characteristics, design objectives and historic and environmental determinants.

§ 2.6.41 **Environmental Study.** Prepare a study to determine the need or requirements for environmental or ecological monitoring, assessment and any required impact statements. Prepare required environmental assessment and impact reports, attend public meetings and hearings, and present the studies to governing authorities.

§ 2.6.42 **Contractor Qualifications.** Prepare a list of contractor's qualifications required for the preservation work. Assist the Owner in evaluating the contractor's submittals and selecting qualified contractors.

§ 2.6.43 Materials Restoration. Provide drawings and specifications as necessary for restoration of materials. List the specific materials and the number of materials to be restored under Section 2.7.

§ 2.7 Expanded Description of Services

(In the space below, provide expanded or modified descriptions of the Historic Preservation Services listed above, add other services as space permits, or refer to an exhibit attached to this document.)

ARTICLE 3 ADDITIONAL SERVICES

§ 3.1 The Architect shall provide Historic Preservation Services exceeding the limits set forth below as Additional Services. When the limits below are reached, the Architect shall notify the Owner:

- .1 () visits to the site by the Architect over the duration of the Project
- .2 () presentations of any portion of the Work as requested by the Owner
- .3 () copies of reports, both interim and final, and other
documentation requested by the Owner
- .4 () appeals to any boards, committees or other required groups

ARTICLE 4 OWNER'S RESPONSIBILITIES

§ 4.1 The Owner shall furnish a program setting forth the Owner's objectives, schedule, constraints and criteria, which may include space requirements and relationships, special equipment, systems and site requirements.

§ 4.2 The Owner shall furnish surveys to describe physical characteristics, legal limitations and utility locations for the site of the Project, and a written legal description of the site. The surveys and legal information shall include, as applicable, grades and lines of streets, alleys, pavements and adjoining property and structures; adjacent drainage; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the site; locations, dimensions and necessary data with respect to existing buildings, other improvements and trees; and information concerning available utility services and lines, both public and private, above and below grade, including inverts and depths. All the information on the survey shall be referenced to a Project benchmark.

ARTICLE 5 COMPENSATION

§ 5.1 For the Architect's Historic Preservation Services described under Article 2, the Owner shall compensate the Architect as follows:

(Insert amount of, or basis for, compensation.)

§ 5.2 For Additional Services that may arise during the course of the Project, including those under Section 3.1, the Owner shall compensate the Architect as follows:

(Insert amount of, or basis for, compensation.)

§ 5.3 Compensation for Additional Services of the Architect's consultants when not included in Section 5.2, shall be the amount invoiced to the Architect plus _____ percent (_____ %), or as otherwise stated below:

ARTICLE 6 SPECIAL TERMS AND CONDITIONS

Special terms and conditions that modify this Standard Form of Architect's Services: Historic Preservation, if any, are as follows:

Sample