

# Choosing a History or Architecture Consultant

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**C**onsultants can be very helpful to you in completing historic preservation projects. Their expertise can be invaluable, providing a rewarding experience for you or your community when planning historic preservation.

## How Should I Begin to Select a Consultant?

Before you do anything else, define your project carefully in writing. Lists of consultants who work in Ohio are available at the State Historic Preservation Office, though the office does not endorse or recommend any consultant. Investigate consultants enough to enable you to identify several who appear to meet your needs. Invite them to submit proposals for your project based on the written description you provide.

## How Do I Judge Consultants?

You should consider the specific needs of your project as well as the consultants' individual fields of expertise. The final decision will be based on the competence, qualifications and capability of undertaking your historic preservation project. Always keep in mind the qualifications necessary for your project, including demonstrated previous experience in similar endeavors. Each consultant's proposal should be evaluated to ensure that the firm is qualified for, understands and can complete your job. Compare acceptable proposals and select the consultant with the best proposal and best price.

## How Do I Determine Whether a Consultant is Qualified?

- A prospective consultant should have a healthy mix of education and experience relevant to your project. Consideration should be given to consultants with a graduate degree in a closely related field; in some cases, significant work experience can substitute well for a graduate degree.

- A prospective consultant should have the necessary experience, staffing and availability of technical and support services to complete the project.
- For some projects, a consultant must meet specific professional qualifications. The State Historic Preservation Office can assist with questions about what qualifications to specify for your project.
- Especially for surveys and National Register of Historic Places nominations, a consultant should demonstrate familiarity with the specific kinds of historic property types in the project area and the various techniques of historical research needed to complete the project.
- Especially for compliance projects, in which the effect of undertakings on historic properties is determined in accordance with Section 106 of the National Historic Preservation Act, a consultant should be able to explain procedures and recommendations to you clearly so that you understand what is needed, why it is needed and how to evaluate and use the finished products and findings.

## Performance

- Can the consultant demonstrate a record of satisfactorily completing projects? Have prospective consultants submit copies of relevant previous work. Contact several clients from the list of references and ask whether reports and other documents were thorough, neat, submitted on time and otherwise acceptable.
- Does the consultant have good communication skills and demonstrate an understanding of your project, needs and goals? The consultant should offer direct answers to all of your questions.
- Has the consultant provided evidence that he or she is staying current with trends in his or her area(s) of expertise (e.g. by attending or participating in courses, conferences and workshops

## Cost

- History/architecture consultants, like consultants in any other field, charge a fee for their services. Generally speaking, you can expect the cost of a consultant to be equal to what you would pay other professionals working an equivalent amount of time.
- In the proposal, the consultant should clearly state the products that will be delivered for the cost proposed and present a time frame, with beginning and ending dates, including deadlines for any drafts you require. The following checklists provide basic outlines for preparing and reviewing requests for proposals and reviewing products submitted by consultants. Tailor these to the specific needs of your project. The Ohio Historic Preservation Office can provide sample requests for proposals.

## Writing Requests for Proposals

- **Information Provided by Client**
  - background/issues
  - project description
  - area characteristics
  - goal of project
  - scope of work
    - task outline
    - specific requirements
      - level of community input
  - products to be generated
    - number and nature of products
    - format requirements
  - presentations expected before, during, after project
  - time requirements and deadlines
  - pre-proposal conference (if any) client responsibility/involvement
  - selection criteria
  - client contact address/phone
  - proposal deadline: date and time
- **Information Requested from Consultant**
  - qualifications required/requested
    - education (c.v. or resume)
    - meets professional qualifications
    - relevant previous work
      - sample(s)
      - list of previous clients
      - samples of relevant previous

- work
- methodology or approach
- statement of products
- schedule
- cost (may be separate if requesting qualifications first)
- references

### Evaluating Proposals

- establish review committee
- use established selection criteria
- qualifications meet requirements
- previous experience relevant
- methodology satisfactory
- work samples satisfactory
- staffing adequate for job
- schedule reasonable
- references satisfactory
- cost competitive
  - use objective rating system
- notify all applicants of decision

### Project Monitoring

- maintain regular contact with consultant
- enforce deadlines
- carefully review all submissions
- content meets expectations
- product neat, complete and organized
- conclusions/recommendations well stated
- graphics appropriate
- coordinate with State Historic Preservation Office
- comply with submission requirements (if any)
- consider future use of products/findings
- public education
- presentation of results to client/public
- dissemination of products/findings

### Specific Product Considerations

- Historic Properties Survey/Inventor Report research design
  - methodology
  - meetings/public participation
  - individual inventory forms and area maps
  - computer coded (if required)
  - evaluations of properties/area
  - bibliography
  - data management
  - location of original notes, negatives, etc.

- state whether data
- computerized locally
- describe report dissemination

- Design Guidelines
  - history of area or district
  - illustrated review of architectural styles present in area or district
  - glossary of architectural terminology
  - description of local review process
  - role of commission/board
  - application forms/procedures
  - copy of local ordinance(s)
  - illustrated design guidance organized by interior and exterior architectural feature

### National Register Nominations

- completed nomination form
- all sections completed
- United States Geological Survey Maps
- b&w photos/color slides as required

- Booklets, Tour Guides, Other
  - accuracy/quality of content
  - neatness and readability of narrative
  - appropriate graphics
  - well-designed product
  - includes sources of additional information

For additional information: *"Using Professional Consultants in Preservation,"* Information series No. 26, 1994, available from the National Trust For Historic Preservation, 1785 Massachusetts Avenue, N.W., Washington, D.C. 20036, (202) 673-4296.

Publication of this fact sheet has been made possible in part by a grant from the U.S. Department of the Interior's National Park Service, administered by the Ohio History Connection, State Historic Preservation Office.

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