

HISTORIC RESOURCE SURVEY TECHNICAL BULLETIN

A Historic Resource Survey (HRS) is a systematic process designed to identify, document, and evaluate historic properties within a designated geographic area. These surveys play a critical role in historic preservation efforts by ensuring that significant buildings, structures, districts, and landscapes are recognized and protected. Municipalities are encouraged to conduct Historic Resource Surveys as part of their preservation planning process, both to identify local historic resources and to facilitate their inclusion in state and federal preservation programs.

While surveys are very similar between states, as each often follows a similar format to the federal National Register of Historic Resources nomination form, there are slight variations in methods and procedures. The following information focuses primarily on conducting Historic Resource Surveys in Pennsylvania.

PURPOSE AND BENEFITS

In Pennsylvania, Historic Resource Surveys serve several key functions that support the state's

historic preservation efforts:

- 1. Identifying Historic Resources:** Pennsylvania municipalities can use surveys to catalog historic resources in their communities, ensuring that historically significant properties are recognized and preserved. Surveys can be completed in defined areas and do not need to encompass the entire municipality every time.
- 2. Informing Preservation Planning:** Surveys help municipalities develop preservation plans and local ordinances that provide guidelines for protecting historic resources. They also support the historic preservation component in the Comprehensive Plan as required by the PA Municipalities Planning Code.
- 3. Eligibility for State and Federal Programs:** An evaluation level survey can help a municipality nominate properties for inclusion in the National Register of Historic Places which provides access to state and federal preservation funding, tax incentives, and grants.
- 4. Supporting Section 106 Compliance:** In Pennsylvania and Delaware, as in the rest of the country, federal projects that may affect historic properties require a review under Section 106 of the National Historic Preservation Act (NHPA). Historic Resource Surveys help identify properties that could be impacted by such projects and assist in Section 106 compliance.



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APPLICATION

In Pennsylvania, Historic Resource Surveys support a range of important applications:

- **Local Preservation Planning:** Surveys help municipalities develop historic preservation plans and set priorities for identifying and protecting key resources. A well-conducted survey enables municipalities to make informed decisions about zoning and planning for development projects.
- **Promoting Cultural Heritage Tourism:** Many Pennsylvania municipalities use their historic resources to boost tourism. Historic Resource Surveys can help identify landmarks and districts that can be marketed as heritage tourism destinations, contributing to local economic development.
- **Preservation Funding:** Properties identified through surveys can become eligible for

funding opportunities, including state and federal grants, tax incentives, and preservation easements.

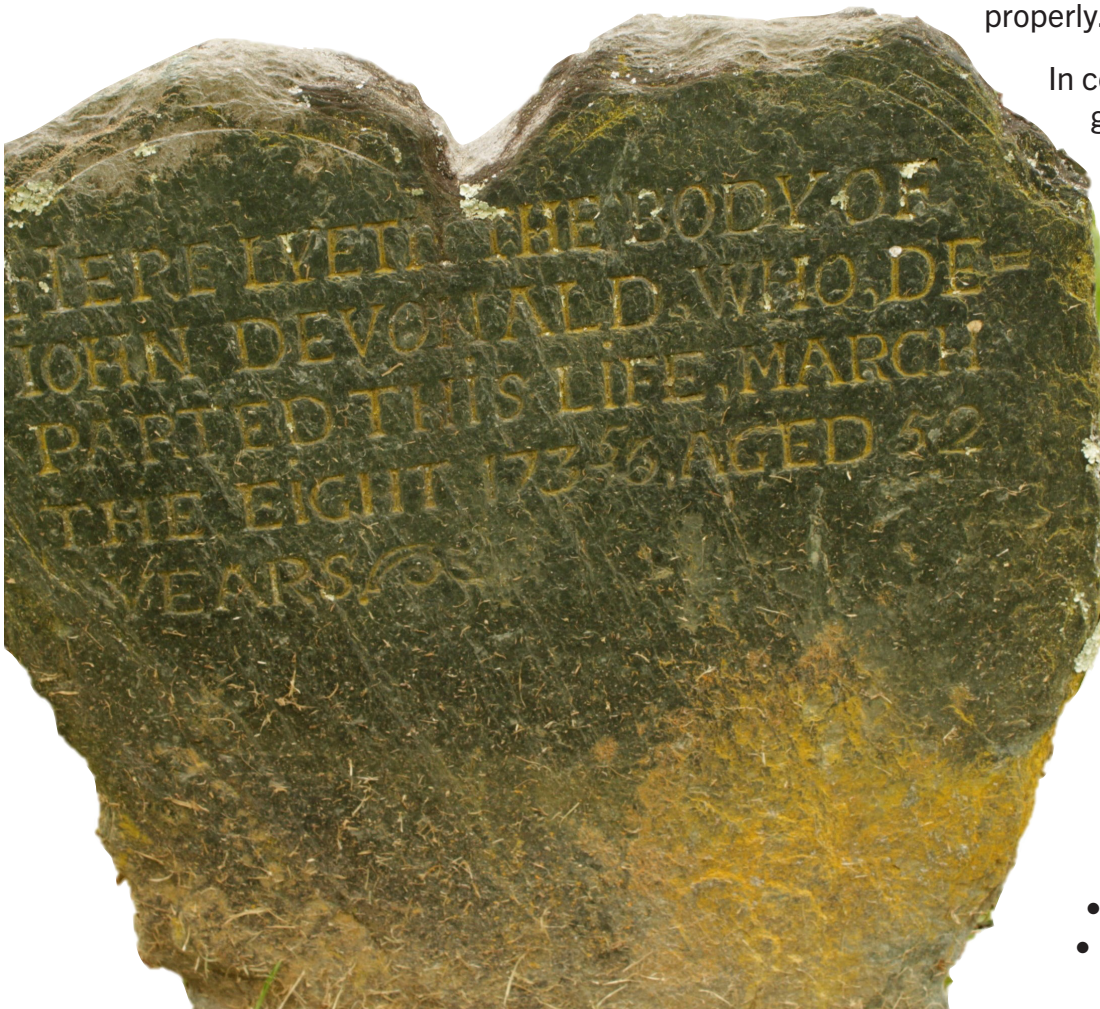
- **Community Engagement:** Surveys foster community involvement in historic preservation. By documenting the history of neighborhoods and individual properties, surveys help local residents connect with their cultural heritage and advocate for the preservation of important sites.

REQUIREMENTS

In Pennsylvania, the Historic Resource Survey Form is no longer used. Instead, information regarding resources is submitted to the PA State Historic Preservation Office (SHPO) through the online database PA-SHARE. A worksheet, provided at the end of this bulletin, can be used to assist in collecting information but it will need to be transcribed into the PA-SHARE online form in order for the resource to be submitted properly.

In conducting a survey and gathering information, the PA SHPO requires certain information be gathered for each resource. This is known as the minimum record, and it includes:

- Resource address
- Resource boundary
- At least one current color photograph
- Resource name
- Resource Classification
- Foundation, wall, and roof materials
- Architectural style
- Owner category
- Year built
- Reason for recording
- Recorder contact information



In addition to recording the required minimum record information, an Evaluation Survey is used to establish a Determination of Eligibility (DOE) by the PA SHPO. The information required is consistent with that required on the National Register Nomination form. They include:

- Significance
- Two Attachments:
- Narrative for the resource’s physical description
- Narrative for the resource’s history and significance
- Bibliographical References

HOW TO CONDUCT A SURVEY

Historic Resource Surveys can be completed by the Municipality, the Historic Commission, a cultural resource consultant, or by volunteers.

There are two levels of historic resource surveys that vary primarily in the depth of information gathered for each site.

Identification Surveys, also known as windshield surveys or inventories, are more surface level and allow for a quicker review of the historic resources in a set area.

1. **Planning and Scope Definition:** Prior to beginning a survey, municipalities should define the geographic scope and objectives of the survey. This might include focusing on a historic district, a specific neighborhood, or an industrial corridor. Municipalities may also prioritize surveys in areas that are at risk of development or demolition.
2. **Background Research:** A limited amount of background research should be conducted to develop an understanding of the area’s developmental history and layout. This can include reviewing current and historic maps and aerial imagery. Previously surveyed resources should be identified, including those listed in or eligible for the National Register of Historic Places. Identification will prevent duplication efforts and allow for updates where necessary.

3. **Fieldwork:** Surveyors carry out on-site fieldwork to gather data about each property’s current physical condition and characteristics. The information can be captured on the worksheet provided by the PA SHPO or entered directly into PA-SHARE if working from an electronic device.
4. **Reporting:** The information from the survey worksheets are transcribed into the PA-SHARE online form for submission to the PA SHPO. They are then publicly available on the database and can be used during future planning efforts by the municipality. The Municipality can retain the paper copies as desired for their records.

Evaluation Surveys extend the identification survey by gathering information about the history of a resource and why it may be important. This level of survey is only required when requesting a Determination of Eligibility (DOE) from the PA SHPO for inclusion in the National Register of Historic Places.

1. **Archival Research:** Archival research is essential to uncover the history of each property. Pennsylvania municipalities can utilize local archives, such as those at the Historical Society of Pennsylvania, Pennsylvania State Archives, and county courthouses. Research may involve examining historic maps, city directories, building permits, and property tax records. In some cases, specific research on Pennsylvania’s industrial and agricultural history may be required.
2. **Community Engagement:** Engaging local communities and residents is a valuable part of the survey process, though not required. Pennsylvania municipalities are encouraged to collaborate with local historians, cultural groups, and long-time residents to gather oral histories and insights about the significance of properties in their communities.
3. **Analysis and Reporting:** Once the data is collected, the information needs to be added to the PA-SHARE online form. Two



narratives will need to be compiled as well, to be included as attachments on the PA-SHARE form.

LEGAL CONTEXT

Historic Resource Surveys in Pennsylvania are shaped by federal, state, and local preservation laws. These laws provide the framework for identifying, protecting, and preserving historic resources.

- **National Historic Preservation Act (NHPA) of 1966:** As in other states, the National Historic Preservation Act is the cornerstone of historic preservation in Pennsylvania. The NHPA requires federal agencies to consider the impact of their actions on historic properties, and it established the National Register of Historic Places. Municipalities in Pennsylvania are encouraged to nominate properties to the National Register to gain recognition and protection.
- **Pennsylvania History Code:** Pennsylvania has its own state-level preservation law that supports the preservation of historic
- resources. The Pennsylvania Historical and Museum Commission (PHMC) is the Commonwealth's official history agency responsible for overseeing preservation programs and activities. It is designated the State Historic Preservation Office (SHPO)
- **Section 106 of the NHPA:** The Section 106 Review process is an essential tool for identifying and protecting historic properties that may be impacted by federal projects. Municipalities conducting Historic Resource Surveys may provide data that helps inform the Section 106 process for projects in their jurisdiction.
- **Local Preservation Ordinances:** Many Pennsylvania municipalities have established local historic districts or passed preservation ordinances that provide specific protections for historic properties. Municipalities may use the results of a Historic Resource Survey to identify areas or properties to be included in local historic districts or to create preservation guidelines for future development.
- **Tax Incentives and Grants:** The Historic



Preservation Tax Credit program, both at the federal and state levels, provides financial incentives for the rehabilitation of historic buildings. Properties listed on or eligible for the National Register of Historic Places are eligible for these incentives. Additionally, municipalities can apply for PHMC grants for preservation projects.

CONCLUSION

Historic Resource Surveys are a vital tool for municipalities, providing a means to systematically document, evaluate, and protect historic resources. By conducting thorough surveys, municipalities ensure that their communities' cultural heritage is preserved for future generations. Whether through local preservation planning, tourism promotion, or eligibility for state and federal programs, the benefits of conducting an HRS extend far beyond the preservation of individual buildings—they contribute to the broader goals of community identity, cultural continuity, and sustainable development. Through careful documentation and evaluation, municipalities can make informed decisions that preserve their unique historic fabric while planning for the future.

