



PRESERVATION BEST PRACTICES # 1 | AUGUST 2021 | MICHIGAN.GOV/SHPO

Selecting a Historic Preservation Consultant

Certain activities require hiring a qualified preservation professional (e.g., CLG grant projects), but local governments can also benefit from hiring consultants for other projects, such as locally-funded surveys and planning studies. An experienced professional can be invaluable in improving the quality of your project and helping to complete it successfully, efficiently, and in accordance with historic preservation best practices.

Types of Preservation Consultants

Choosing the right person for your job is extremely important. Preservation consultants generally fall into five categories, although many have relevant experience in multiple areas.

- **Archaeologists** study past human cultures by identifying, documenting, and analyzing the material remains (sites and artifacts) that people left behind.
- **Architectural Historians** document the built environment to understand the significance of a particular place for projects such as historic resource surveys and National Register nominations.
- **Historians** study and interpret past events through the analysis of research, oral history, and other information for projects such as community histories and context studies.
- **Historical Architects** specialize in the appropriate treatment of historic buildings and structures and routinely develop architectural drawings for rehabilitation and restoration projects or assist in studies such as Historic Structure Reports and Condition Assessment Reports.
- **Preservation Planners** integrate preservation into broader community planning processes and develop strategies to plan for, protect, leverage, and interpret significant places.

Keep in mind that there are other professionals who may also be involved in a preservation project. Examples include engineers, historic landscape architects, geographers, anthropologists, and preservation craftspersons.

WHAT IS A 'QUALIFIED PROFESSIONAL'?

In preservation work, you often hear the phrases 'qualified professional,' 'federally qualified,' and '36 CFR 61 qualified.' These refer to people that meet the "Secretary of the Interior's Professional Qualification Standards" (36 CFR 61 qualifications), which are used by the National Park Service (NPS) to identify persons with demonstrated experience in archaeology, architectural history, history, and/or historic architecture. Use of professionals meeting the qualification standards is required on CLG grant projects and is always encouraged as a best practice.

For more information on the qualification standards, visit: www.nps.gov/history/local-law/arch_stnds_9.htm.

WHERE CAN I FIND A CONSULTANT?

SHPO Qualified Professionals List

The State Historic Preservation Office (SHPO) does not license, certify, endorse, or recommend consultants. However, SHPO maintains a list of individuals and firms that have voluntarily submitted information demonstrating that they meet the minimum requirements necessary to be considered a qualified professional. This list is available at www.michigan.gov/shpo.

While this list can be useful in identifying consultants to contact, it is not comprehensive and should not be used as the sole basis for hiring a professional for your project. Always check references.

MHPN Historic Resource Council Directory

Every year, the Michigan Historic Preservation Network (MHPN) publishes the Historic Resource Council Directory. The directory provides contact information for architects, craftspersons, cultural resource management firms, and others who work on preservation projects in Michigan. The directory is available at www.mhpn.org/historic-resource-council-directory.

Selecting a Historic Preservation Consultant: Best Practices and Considerations

The following best practices are intended to supplement (not replace) your local government's requirements for bidding and contractor selection. Before getting started, contact your community's purchasing/contracting unit to make sure that you are compliant with all applicable local standards and requirements.

1. Define Your Project Need

Carefully define your project need and goals so that you can provide potential consultants with a clear scope of work, including tasks to be completed, timeframe, required deliverables, required meetings, and other elements that might impact the project. For example, if you are doing a historic resource survey, your scope should clearly identify how many properties require survey.

Use this information to coordinate with your community's purchasing/contracting unit and prepare a Request for Proposals (RFP) that can be distributed to potential consultants. In addition to requesting a description of the consultant's methodology for completing the project and a proposed cost for the scope of work, the RFP should include a request for resumes, project references, and, if applicable, samples of similar work.

2. Identify Consultants to Contact

Identify the consultants that you will contact. Best practice is to identify at least three (3) consultants so that you have a variety of options to consider. If you aren't sure where to start, begin by checking SHPO's list of qualified professionals and MHPN's Historic Resource Council Directory. Reaching out to other communities who have successfully completed similar projects can also be helpful in identifying potential consultants.

3. Request Proposals and Evaluate Consultants

Contact the consultants on your list and invite them to respond to your RFP. Evaluate and compare received proposals with the goal of identifying a consultant that has a suitable combination of expertise and experience and can meet your project goals in consideration of your budget and timeline.

If needed, ask consultants for additional information or clarification. Spend sufficient time visiting websites, checking references, and reviewing example work. Follow-up interviews with potential consultants may be appropriate before making a final decision.

4. Select a Consultant to Hire

Identify and retain a qualified consultant who understands your project and can successfully complete it by providing high-quality work. Prioritize selection based on the best service at the best cost rather than low bid. Selection based solely on cost can often lead to unexpected problems once a project has started.

EVALUATING CONSULTANT PROPOSALS

When evaluating consultant information, you should consider the specific needs of your project and the consultant's expertise, experience, and approach. The following questions may be helpful as a starting point.

Competence: Determine if the consultant can successfully complete the scope of work.

- Does the consultant meet professional standards and/or have appropriate licenses, if applicable?
- Does the consultant demonstrate project understanding and depth of knowledge?
- Does the consultant have experience with similar projects and resources?
- Does the consultant have experience with public meetings or gathering public input?
- Does the consultant have special skills or expertise that will be valuable to the project?

Compatibility: Determine if the consultant would be a good project partner.

- How will the consultant approach the project?
- Is the consultant's management and communication style a good fit for you?
- How will they keep you informed of progress?
- How will they deal with setbacks, delays, or other problems that arise?

Track Record. Determine if the consultant has a record of successful project completion.

- Were past clients satisfied with their work?
- Were deadlines met on past projects?
- Did they stay within budget on past projects?
- Were there any past communication issues?

Cost and Timeline: Determine if the consultant can complete the project on budget and on time.

- How quickly can the consultant start?
- Do they have sufficient staffing?
- Have they included all necessary project activities in their schedule?
- Are project costs reasonable and sufficient?
- Have they identified how they will handle unforeseen issues or resolve conflicts?



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