

HISTORIC CHARLESTON FOUNDATION

AN ARCHITECTURAL
CONSERVATION
'MANUAL OF PRACTICE'
FOR OWNERS OF
SIGNIFICANT HISTORIC
HOUSES

A PROPOSAL TO JOHN AND
MARGARET THORNTON

October 20, 1998

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AN ARCHITECTURAL CONSERVATION 'MANUAL OF PRACTICE' FOR OWNERS OF SIGNIFICANT HISTORIC HOUSES

INTRODUCTION

Historic Charleston Foundation is pleased that the Simmons-Edwards House at 14 Legare is now in the hands of owners who are proceeding carefully to ensure the conservation and preservation of this important house. A National Historic Landmark, the Simmons-Edwards House is one of the nation's most significant neoclassical dwellings. The Foundation holds a conservation easement on the exterior of the building and anticipates that, after years of neglect, the house will again receive the care and maintenance necessary to its survival and demanded by its stature.

IN LIGHT OF THE CONSERVATION AND RESTORATION WORK CONTEMPLATED, HISTORIC CHARLESTON FOUNDATION WOULD LIKE TO PROPOSE A PARTNERSHIP THAT WOULD, USING THE CONSERVATION OF THE SIMMONS-EDWARDS HOUSE AS ITS LABORATORY, PRODUCE A REPLICABLE TEMPLATE TO GUIDE OWNERS OF SIMILARLY REMARKABLE SITES IN THE LONG-TERM STEWARDSHIP AND UNDERSTANDING OF THEIR PROPERTIES.

This is a substantial undertaking on a singular property. Historic Charleston Foundation is willing to donate the time and efforts of its staff and administrative support to the project. We ask that you consider a contribution to allow this project to live up to its potential and the Foundation to employ the most appropriate architects, architectural historians, archaeologists, and other consultants for this project.

The purchase and restoration of 14 Legare is in itself a generous gift to this community. However, the analysis and documentation of the site, the dissemination of that information, and the generation of a "manual of practice" for guardians of other significant historic properties is a gift to the world of historic preservation that will help to guide and inspire similar efforts for generations to come.

PROJECT OBJECTIVE: CREATING A TEMPLATE FOR OTHER HOMEOWNERS

With your support, Historic Charleston Foundation will undertake an Historic Structure Analysis along with a comprehensive archaeological investigation of 12-14 Legare Street. An Historic Structure Analysis of 14 Legare will document and explain the evolution and history of the house and its outbuildings. This analysis will identify the original configuration and finishes in the house and will delineate changes and alterations made to the house over the course of the last two centuries. In addition, an archaeological investigation will be undertaken to provide information about the history and use of both 14 and 12 Legare Street, the now-open lot to the south.

The results of this analysis will be used by Historic Charleston Foundation as the basis for writing a 'Manual of Practice' to guide similar efforts. Owners of historic buildings will have available to them this manual as a roadmap for their own preservation projects.

THE PRODUCTS OF THIS PROJECT WOULD BE TWOFOLD:

- 1) An Historic Structure Analysis: precise, accurate information about the history of the house, its grounds and outbuildings; and
- 2) A Manual of Practice: the creation of a model, or template of a process, that owners of other historic buildings would find useful in guiding them as they undertake to maintain, restore, and interpret their own historic resources.

THE TEAM

CONSULTANTS AND STAFF

The project will be led and administered by Historic Charleston Foundation. Carter Hudgins, the Executive Director of the Foundation will be the team leader. The principal members of the project team include:

Susan L. Buck -- Historic Paint and Architectural Services, Inc.

Willie Graham -- Department of Architectural Research, Colonial Williamsburg Foundation

Glenn F. Keyes, AIA -- Glenn Keyes Architects

Richard Marks, Richard Marks Architectural Conservation

Orlando Ridout V -- Maryland Historical Trust

Martha A. Zierden -- The Charleston Museum

ADVISORY COMMITTEE

The project team will be assisted by an advisory panel during the final phase of formulating a 'Manual of Practice.' This committee of Foundation staff and trustees, national authorities on architectural and collections conservation practices will provide guidance and direction through the writing, publication and dissemination of the Manual of Practice.

PART ONE: HISTORIC STRUCTURE ANALYSIS AND ARCHAEOLOGICAL INVESTIGATION

OBJECTIVE

As the first step in this project, Historic Charleston Foundation will undertake the comprehensive study and analysis of the Simmons-Edwards House. A team of experts will be assembled representing a range of architectural, conservation and historic preservation skills and disciplines. The scope of this Historic Structure Analysis will include a detailed examination of the documentary record for the site, a careful archaeological investigation of the property, and an architectural analysis of the house, outbuildings, and surviving landscape features.

Glenn Keyes will coordinate all aspects of this project. Architectural analysis will be undertaken by architectural historians Willie Graham and Orlando Ridout V. Martha Zierden will manage the archaeological component. Paint analysis and plaster identification will be carried out by architectural finishes consultant Susan Buck. Mortar analysis will be conducted by Froehling and Robertson testing laboratory in Richmond, Virginia.

Historic Charleston Foundation will make immediate use of all information gathered during the study in administering its conservation easement of the property and, as it does for all its easement properties, advise on the best and most appropriate preservation and restoration practices.

Architectural investigations will be timed to assist in the planning and execution of the restoration of the house. This portion of the project will build on work undertaken to date. Documentary research will be conducted in two stages. First, a preliminary search will be made to identify the location of most relevant sources. Transcription of relevant material will be made when feasible, but the most significant product from this phase will be a catalog of materials investigated, noting which sources had useful information, the nature of the data, and which sources were not worth further pursuit. A second, more intensive, search will follow up on the leads of the first study and generate a more complete compendium of relevant sources.

The archaeological study follows more than two decades of research on similar sites by the principal investigator and will have two primary goals. The principal focus of archaeological research in Charleston for the past five years has been the evolution of the urban landscape. The staff of The Charleston Museum, lead by curator of historical archaeology Martha Zierden, has conducted most of that research. Archaeological research at 14 Legare as part of Phase I will derive its meaning from comparison with numerous previously studied sites in Charleston, and elsewhere, but its primary goal is to provide information necessary to a restoration of the garden and landscape features at 14 Legare. A second and more immediate goal is the mitigation of the effect that the HVAC well system will have on the archaeological resources that lie buried in the yard.

To accomplish this goal, it will be necessary to test the yard to discover the intensity of the archaeological record. This will be coordinated in part with locating a number of well shafts for the proposed HVAC equipment. Second, salvage archaeology will be done in areas where the ground is intended to be disturbed (for utility trenches, or where historic stone or brick floors are removed in the cellar, for example). Some testing will be required simply to answer architectural questions (for instance, assisting in dating the internal garden walls). Finally, a large-scale excavation might be undertaken at some point in the future to better understand the development of the yard and to responsibly recover information on the nature of historic gardens and landscape features on the property.

There will be three other components to this phase of the project. Selected Charleston structures closely related in architectural detail to this site need to be investigated to help set the context for this structure. Additionally, a set of measured drawings of the Simmons-Edwards House will be created. These drawings will be analytical to the extent that they would a) document the building in its current condition, and b) identify changes made to it over the last two centuries. Furthermore, a set of small-scale drawings illustrating the house in its various periods of development will be produced. These drawings will be inked on mylar and made part of the Historic American Buildings Survey collection at the Library of Congress. Finally, a set of large format black-and-white photographs documenting the house in its restored form will be produced.

SCOPE OF SERVICES

Part One of the project will be conducted in three discreet phases, guided by the schedule for restoration of the house. These phases have been designed so work is conducted in a logical progression tied to the opportunities and needs that derive from the restoration process. Thus the first phase of work is tightly focused and can be accurately budgeted. The work program for Phase 2 is presented in outline form and of necessity will be refined further on the basis of findings of the Phase 1 work. Phase 3 is also in outline form, subject to refinement as the preceding work is completed.

Phase 1: Architectural Investigation, Main House and Wing (January - September 1998)

Work will focus on a comprehensive investigation of the house, wing and kitchen building to determine the original configuration of the complex. This will require intensive investigation of the building fabric both inside and outside, the original plan configuration, and identification of the principal periods of change that have occurred over time. This phase of work will serve as the basis for developing a draft restoration philosophy that will guide subsequent planning and design work. The architectural investigation will be supplemented with documentary research and archaeological testing of the site.

Documentary research will include four principal areas of concentration:

- 1) Preparation of an accurate chain of title for the two properties (12 and 14 Legare).
- 2) Census data for the households of 12-14 Legare for each available decade.
- 3) Collateral research on key owners that are considered particularly important to the development of the site.
- 4) A search of Charleston archival and institutional collections for historic maps, plats, photographs and other visual images related to the site.

Archaeological investigations will consist of five sample units located in both yards (the lot once known as 12 Legare as well as the yard of 14 Legare). The goal will be to test assumptions about the historic configuration of the two properties and determine the density and integrity of resources present.

Phase 1 Products

- a) Draft architectural overview of the main house, wing and kitchen. This document will be organized to include each aspect of the exterior of the building and a room-by-room catalog of the interior of the buildings. The report will include a statement of the restoration objectives and establish guidelines for restoration decisions.
- b) Draft report on investigation of historic paint colors and wall finishes.
- c) Results of historic mortar analysis.
- d) Draft catalog of historic images related to the site.
- e) Draft chronological timeline for 12-14 Legare Street, including complete chain of title.

- f) Brief summary of archaeological testing with recommendations for further work.

Phase 2: Interior details and finishes (begin October 1998)

Architectural investigations will focus on a refinement of the first phase of work. Field research will include preparation of a catalog of architectural components found on the site, investigation of architectural details, hardware, historic fixtures and fittings of every kind. The results of the Phase 1 paint analysis will be reviewed on a room-by-room basis and additional samples will be tested where needed to resolve research questions. Selected sites elsewhere in the city will be investigated to provide architectural context for design elements of 14 Legare. The intensive survey of fittings and finishes will become the basis for a further refinement of the restoration philosophy drafted in Phase 1, now expanded to serve as the basis for selecting finishes for implementation as part of a coherent interpretation plan.

Documentary research will be expanded to include a search of archival and institutional holdings outside of Charleston. Additional research will also be conducted to expand the coverage of each generation of ownership, including a search for collateral records that provide historical context for the development of the site and its place in the history of Charleston.

This phase of architectural and documentary research will also serve as the basis for designing a more intensive phase of archeological investigation. In this phase of the project, however, archaeology will be confined to investigation of features that will be affected by restoration work, such as utility trenches, subterranean duct chases, and other at-grade features.

Phase 2 Products:

- a) The Historic Structure Analysis for 14 Legare will be expanded to include the detailed investigation of fixtures and fittings, and preparation of a summary of key architectural elements in the broader context of neoclassical architecture in the city of Charleston.
- b) Expanded chronological timeline that will provide a single-source summary of all primary and secondary source references to the property.
- c) Catalog of historic images including new findings and expanded to provide descriptive captions for each image.
- d) Catalog of architectural elements discovered on site; all artifacts will be labeled and bagged.
- e) Developmental drawings that demonstrate the architectural evolution of the house over time.
- f) Completion of archaeological investigation of features that will be affected by installation of mechanical systems and other aspects of the restoration.

Phase 3: Gardens, Grounds and Outbuildings [Spring/Summer 1999]

Architectural investigations will shift from the main house and kitchen to the rest of the site, including a complete investigation of the stable, the brick privy and the architectural elements of the grounds, including gates, boundary walls, and the architectural features associated with the garden. Research will include investigation of selected stable and garden structures and elements elsewhere in the city that will provide context for the design and detailing of these specialized structures and features.

Documentary research will focus on evidence of garden design in Charleston from the late eighteenth and early nineteenth centuries. The goal of this aspect of the research will be to create a context for interpreting physical, documentary and archaeological evidence of the gardens at 12-14 Legare, with particular attention to the first two periods of ownership.

Archaeological investigations will also focus on the grounds and gardens. The research design will be based on prior field research, documentary evidence, and the Phase 1 and 2 archaeological testing. The principal goal will be a systematic investigation of garden evidence with particular attention on the early nineteenth century configuration of the grounds and plantings.

Phase 3 will complete the physical and documentary investigation of the Simmons-Edwards House and its grounds.

Phase 3 Products

Historic Structure Analysis in final report form, to include:

- 1) Historical overview of Simmons-Edwards House and property including setting in larger context of the city.
- 2) Architectural analysis of the house and associated buildings.
- 3) Archaeological results of all field investigations.
- 4) Discussion of garden evidence, including significance in context of the city.
- 5) Catalog of historic images related to the property.
- 6) Chronological timeline of key events in the history of the property.

FINAL REPORT

Two copies of the final report will be produced, one for Mr. and Mrs. Thornton, and one for Historic Charleston Foundation. Additional copies may be produced in photocopy format for donation to selected archival repositories such as the Library of Congress, South Carolina Historical Society, Colonial Williamsburg Foundation, and the Museum of Early Southern Decorative Arts in Winston-Salem, North Carolina. A finished set of drawings and large-format black-and-white photographs will be placed with the Historic American Buildings Survey collection at the Library of Congress.

PART TWO: PUBLIC PRESERVATION PRODUCTS

OBJECTIVE

A detailed and methodical approach to pre-restoration investigation is relatively rare for private dwellings and a standardized approach to that process is lacking even for publicly-managed sites. Thus Historic Charleston Foundation is anxious to create a series of publications that can be used to encourage a careful, responsible approach to restoration and preservation activity both in Charleston and the wider world. Two products are envisioned to address this need in the context of the restoration of the Simmons-Edwards House.

1) Restoration Case Study. The Historic Structures Analysis will serve as a comprehensive report on the multi-disciplinary investigation of the property and as the driving force in making restoration decisions. Copies of this report will be available at certain key archival locations. However, this report will be highly detailed and technical, and will be too lengthy for dissemination to a wider public. Yet the investigations will have uncovered a wealth of insightful information worthy of broader distribution.

The Foundation therefore proposes to prepare a case study of the investigation that will trace the discovery process in a methodical way from the first broad-brush review of the building to the final resolution of key research problems and questions. This report will be heavily illustrated and will depend as much on detailed captions as on text to explain the process of investigation. We envision a product that can be used both to instruct the public in the value and benefits of careful investigation, and simultaneously engender enthusiasm for the process of discovery that comes out of responsible research. The illustrations will be taken from field drawings, photographs and architectural drawings already prepared as part of the project; text also will be largely based on the completed report.

2) Restoration Manual of Practice. This product is envisioned as a relatively brief document published in booklet format that can serve as the entree to a discussion of restoration philosophy and practice. The Foundation anticipates that this document would be used to encourage owners of historic properties to make alterations and improvements to their property in a careful and responsible fashion. Whether digging a new utility trench, repainting the drawing room, or converting the service quarter to a guest house, all have tremendous potential to yield significant insights into the history of that specific site while also contributing to our understanding of the broader context of regional history.

BUDGET

Phase 1 Budget

Architectural research and investigations		\$32,560
labor	\$22,200	
travel	\$10,360	
Report preparation		\$12,650
labor	\$12,000	
material	\$ 150	
photographic prints	\$ 500	
Documentary research		\$ 5,000
Archaeological investigations & report preparation		\$14,700
HABS drawings of 14 Legare		\$ 4,000
Paint analysis		\$21,785
Mortar analysis		\$ 900
Total for Phase I		\$91,595

Phase 2 Budget: TO BE DETERMINED

Architectural research and investigations

Report preparation and photography

Documentary research

Archaeological investigations & report preparation

Preparation of drawings delineating phases of development [G. Keyes]

Paint analysis

Phase 3 Budget: TO BE DETERMINED

Architectural research and investigations

Report preparation and photography

Documentary research

Archaeological investigations & report preparation