



# **A step-by-step Survey Guide for Historic Buildings**

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17 November 2011

The seven steps are:

1. The external look of the building
2. Location and surroundings
3. Visible internal features
4. Hidden internal features
5. Documentary records
6. Summarise the building as a whole
7. Summary and conclusions



## INTRODUCTION

This is a step-by-step guide to viewing a historic building. Its seven steps follow the 'natural progression of discovery', starting when you first see the building from outside on the street or across the fields, then progressing indoors, and so on.

Each step sets out questions to ask about the building you're looking at. These will enable you to gather information about the building, gradually building up a survey record which can eventually identify the date when it was first built, track its subsequent history, and judge its historic value. The seven steps are intended for people with an interest in historic buildings but without a lot of experience.

However the steps are not set in stone: if you already have some prior information about the building it may be more appropriate first to search existing records (step 5) before going along to conduct your field survey (steps 1-4). Local circumstances too may require a change of order: steps 2 and 3 require access inside the building – so may need to be skipped until a return visit is possible.

Nor is it essential to complete all seven steps. Even if all you do is stand outside the building and complete step 1, this may be sufficient to evaluate the building, estimate its date of construction and judge its historic importance. The record you produce will be of value to others who come later, who may then carry your survey further.

Be aware, also, that this is the first of three stages in the analysis of a historic building.

- This is the observation stage, gathering the evidence.
- The second stage is analysis and deduction, to determine what the evidence is telling us.
- The third is writing the report, focusing on the critical evidence to tell the story of the building's history.

(During this survey stage it is worth noting down possible deductions – while you've got the real building in front of you – but make sure you differentiate these from the evidence you record, because further evidence may disprove your initial ideas.)

Each step should be recorded with the maximum possible information and should conclude with a brief assessment of the original construction date drawn from the evidence gathered. Photographs and sketches/drawings should be used to complement the written notes.

Indeed it is difficult to overemphasise the value of photographs and sketches made on the spot. Not only will these later prompt your memories of the building, but they can also reveal features you didn't notice at the time. And they will be an essential element in your final report.

One point is worth stressing from the beginning: when observing a historic building, watch out for the unusual, oddities and anomalies – beams cut through, blocked doorways, unmatched windows, variations in brickwork – because these are the clues to its history.

Also be aware that the house you look at today may once have been something else. Barn conversions have been around since at least the 16th century... and conversions of churches, chapels, schools, workshops, forges, mills, cowsheds, pigsties and industrial premises of all sorts.

Remember too that, while a historic building survey can be done by one person, two or three working together will observe more and a tape measure is more accurate in two pairs of hands.

**STEP 1:**

**The external look of the building**

Record the general exterior appearance of the building, including:

- Does the building face north, south, east or west?  
(This will be helpful in describing it: 'the south-east corner' for instance.)
- The building type: is it a house, shop, workshop, factory?
- Is the building detached, semi-detached, or part of a connected line of buildings?
- Is the building 'all of a piece' or does it have later additions and alterations?
- What is the shape of the building?
  - A plain rectangle?
  - L-shaped?
  - With a projecting wing, or wings?
  - With a lean-to?
  - A 'double-pile'?
  - Other (make a rough drawing.)
- Is the building front symmetrical or asymmetrical?  
(Be aware that one section may be symmetrical while another is not.)
- What is the shape of the roof?
  - Hipped,
  - Half-hipped,
  - End-gabled,
  - Front-facing gables,
  - Pentice,
  - Mansard,
  - Other (make a rough drawing.)
- Is the main roofline straight or uneven?
- Are the eaves low or full-height?
  - Are they decorative: marked by a line of decorative brickwork, for instance?
  - Are there gutters and downpipes? Of what material?
- How many chimney stacks and chimney pots?
  - In what positions are these?
  - Is each chimney stack built out from the wall? Or is it internal?

- What construction materials have been used for the walls?
  - Timber-frame? If so, how many bays are there?
  - Brick?
  - Rendered?
  - Tile-hung?
  - Weather-boarded?
  - Pebble-dash?
  - Other...
  - A combination of these (make a rough sketch)
- Are the wall surfaces painted? Or left untreated?
- What construction materials have been used for the roof?
  - Slates?
  - Tiles? Of stone, clay or modern concrete?
  - Thatch?
  - Flat and roofed with felt?
- Do these materials vary from one part of the building to another? Are they handled decoratively?
- Do differences in materials show possible changes to the building over time?
  - Do these show later additions, or repairs?
  - Do they show an upgrading of the frontage?
  - Are there any indications of an earlier structure, for instance a wooden frame, perhaps hidden by later cladding or rendering?
  - Are there any signs, such as marks on the wall surfaces, that an earlier connected building (such as a lean-to) may have been removed?
- Does the building stand on a raised plinth?
  - How high is this?
  - Is it of a different material?
- If the walls are of brick, what brick 'bond' has been used?  
(see the Illustrated Glossary for the various types)
- Is there a string course, for instance marking the line between floor levels?
- What is the shape, size and position of the windows?
  - Are they all the same or do they vary?
  - Of what materials are the window frames, the lintels, the sills?
- In what position is the main entrance door?
  - Are there steps up to it? Or down?
  - Is the front door and doorframe simple or decorative? Is it designed to make an impression on the viewer?

- Is there an external porch, open or enclosed?
  - Describe it: roof, walls, doors, windows. (Make a rough drawing.)
  - Does this appear to be part of the original building or a later addition?
- Are there any secondary entrance doors?
  - Or passageways?
- Are there are indications of blocked doors or windows?
- Are there any 'overlaps' in the structure? For example where a later roof slope has cut across an earlier feature such as a window or doorway?
- Are there any signs of subsidence in the building, or works to remedy this?
  - An added buttress?
  - A metal tie-bar or rod?
  - Cracks in the walling materials?
  - Are the window frames out-of-square?
- Are there any indications of later measures to combat damp?
  - A line of filled drill-holes left by injected chemical damp-proofing?
  - Rendering across the lower 2ft of the external walls?
- Are there any signs that the building might have been converted from a different function in the past? A redundant inn sign, for instance, an extra-large window which might have belonged to a shop, or an extra-large chimney indicating a former bakery or industrial function?

Now make a first estimate of the construction date of the building based on its general external appearance.

**STEP 2:****Location and surroundings**

The position of the building in its surroundings may give you clues to its history:

- Is the building set within:
  - A town?
  - Village?
  - Open countryside?
  - Farmland?
  - Its own estate?
  - A garden?
  
- Is the building set within a group of other related buildings?
  - A farmyard?
  - A set of outbuildings or workshops?
  
- Does the building face directly onto its access road?
  - Or is it set back, behind a garden or yard?
  - Is it sideways-on to the road?
  
- Is the area around the building landscaped or does it follow the natural contours of the surrounding land?
  - Is the ground broken, indicating earlier disturbance for any reason?
  - Is the area level, or sloping – to a stream for instance?
  
- What status is the access road?
  - Main road,
  - Village street,
  - Farm track,
  - Side road,
  - Footpath or alley?
  
- Are there any signs that the pattern of local roads might have changed, for instance as a result of a village by-pass or the abandonment of a former lane?
  
- How close are the neighbouring buildings?
  
- Are the other properties on either side similar or different?
  - In style or design?
  - In apparent date?
  
- Are there any public buildings nearby: a church, for instance, or village hall, school or public house?

- Does the building itself have an obvious local function, for instance manor house, vicarage, schoolmaster's house, or might it have had such a use in the past?



If you already have permission to view the interior of the building, continue with Step 3. Otherwise either knock on the door - or go to Step 5, then, if you can, contact the building's owner to arrange a later return visit.



**STEP 3:****Visible internal features**

Make a rough floor plan for each storey of the house:

- Note the shape and position of lobbies, passageways and stairs.
- At what points do external doors come into the building?
  - Into a room, passageway, lobby?
- Is there a cellar?
  - How is it accessed?
  - Does its shape match that of the ground-floor above?
- Make particular note of any changes in floor or ceiling levels; these may indicate additions and alternations to the building over time.
- Are there any attached outbuildings, with separate entrances?

Now draw a floor plan of each room numbering them A, B, C... and recording:

- The room's principal dimensions,
- The position of doors, windows, fireplaces and other features,
- Its relationship to adjoining rooms.



FOR EACH ROOM, record the interior construction, carpentry and finishing, again numbering the rooms A, B, C... and recording:

- What is the room's present function?
- Is there a fireplace and chimney?
  - What is its position?
  - How is it constructed?
  - Might the fireplace be a later replacement?
  - Is there a cooking range or a bread oven?
  - Is there a hearth? Of what materials is this?
  - Are there built-in shelves or even seats within the fireplace?
  - Is the chimney open or blocked?
- Are there any signs that a fireplace has been removed?
- Is there timber framing in the room?
  - In the walls?  
(Note their positions; make a rough sketch of the timbers.)

- In the ceiling or roof? (Again, note their positions and make a sketch.)
- What is the shape and finish of the timbers?
  - Rough-hewn?
  - Hand-finished?
  - Machine-finished?
- Are the main beams chamfered?
- Are there chamfer stops? Of what type are these?
- Is the finishing of the timbers in the room consistent?
- Do the inconsistencies offer any clues to the uses of the room, or changes over time?
- Are there any visible joints? Of what type?
- Are there any visible carpenters' marks?
- Do any of the timbers show signs of re-use: empty slots left by earlier joints, for instance, or chamfers cut off without end stops?
- Have any of the timbers been later reinforced, for instance by the addition of metal strapping or the insertion of extra posts?
- Of what materials is the floor?
  - Is it solid:
    - of earth,
    - stone,
    - tiles,
    - 'quarry tiles',
    - cement,
    - concrete
  - Is it a suspended floor, of wooden boarding?
    - How wide are the boards?
- How many windows in the room?
  - Is their positioning consistent or variable?
  - What type of glazing?
    - Single-pane
    - Multiple panes - how many?
    - Leaded lights

- Of what materials are the frames, lintels, sills?
- What type of opening?
  - Vertical sash?
  - Horizontal sash?
  - Casement?
  - Fixed?
- Of what materials is the window furniture: catches, hinges?
- Of what type are the doors?
  - Pannelled?
    - How many panels?
    - Of what sizes?
  - Planked?
    - How many planks?
    - How are they joined?
    - Ledged?
    - Ledged and braced?
    - Tongue-and-groove?
- Of what materials are the door furniture?
  - Knobs?
  - Latches?
  - Locks?
  - Hooks, etc?
- Does the door or doorway show any signs of alteration, re-use or replacement? (For instance, old weathering on an internal doorframe or marks indicating the repositioning of hinges.)
- Is there any fitted furniture, cupboards or alcoves for instance?
  - Does their woodwork match that of the room as a whole?
- Are there fitted skirting boards?
  - Are these plain or decorative, with mouldings for instance?
- What decorative features are there, for instance wooden mouldings to door frames and skirtings or ceiling decorations?
  - Do these appear original, later, or modern? (Beware of later decorative features which reproduce earlier styles.)
    - Are there any wall paintings?
    - Is the plasterwork rough or smooth-finished?
    - Are these, or other fixtures and fittings, original?

- What are the adjoining rooms?
  - Is there any change of level, a slope or steps, at the doorway?

Above all, watch out for the unusual:

- Watch out for 'external' features that have become internal - wall plinths for instance – as these may indicate later extension.
- Note out-of-size features:
  - Smaller than average doorways may be the result of later knocking-through.
  - Modern doors are standard, so larger than average usually means earlier.
  - Note 'partial features':
    - has a timber wall plate or tie-beam been cut through, for instance, or a fireplace narrowed, a ceiling moulding interrupted by a later partition?
    - Does the room have signs of two fireplaces, perhaps with one now blocked?

Things such as these are all clues to the history of the house.

- Finally, from what you have recorded, might the function of the room have changed at some time in the past?



NOW MOVE ON TO THE NEXT ROOM and repeat the steps from page 8 above...



Finally, record the 'communications areas' of the building: hallways, passages, stairs.

- If there is an entrance hall, is it large, designed to impress? Or small and functional?
- What decorative features are there - for instance is there an impressive doorcase, staircase or larger than average window?
- Does a single staircase rise from ground floor to roof, or are the stairs between different floors in different positions?
  - Of what type is the staircase?
    - Enclosed or open?
    - A circular stair?
    - A 'winder'?
    - Other... (make a sketch)

- Of what materials are the stairs, banisters, stair-rails?
- Might the stairs be original, or might they have been replaced or moved during the building's history?
- Is there more than one staircase?
- Are there any other changes of level within the building?
- Do the passageways indicate differences in function within the building? 'Upstairs, downstairs', for instance?

Now make a second estimate of the construction date of the building based on its general internal appearance.

- Does this internal dating agree with that you made after examining its exterior?
- If not, what does this indicate about the history of the building?
- Do the floor plans indicate any changes, additions and perhaps even demolitions during the history of the building?



If the house owner is willing and you have the time, it is worth doing a measured survey. Taking exact measurements of a historic building, externally and internally, can often turn up information you might otherwise miss. For instance:

Is the front wall of the building thicker than the rest? If so, a new frontage may have been added to an older house; that 18th-century façade may be hiding an original 16th-century building.

Do internal cross-walls align on different floors? If not, then one has probably been moved or inserted; at one time there may have been two houses here, not one.

- Guidance on how to do a measured historical survey can be found in the 'Step-by-step Guide to Recording a Building' and how to draw up the results in the 'Step-by-step Guide to Drawing a Building' – both on the Bucks Archaeological Society's website at [www.bucksas.org.uk/hbgresources.html](http://www.bucksas.org.uk/hbgresources.html).



If the house owner is willing to give you access to roof spaces and other areas that are not normally visible, such as cellars and outhouses, and you have the tools to examine these safely (torch, ladders, working clothing etc) then move on to Step 4.

If not, can you arrange to do this at a future date? Otherwise, for the meantime anyway, your field survey is done.

### STEP 4:

#### Hidden internal features

To judge these you will need access to the roof and the cellar. This requires both the owner's agreement and some considerations of safety.

Be aware that in an old building there may be several separate roof spaces and/or cellar spaces, with separate access points. Be aware that these may have been built at different times, so you may need to survey each section separately.

- The roof structure:
  - This may well be the deciding factor in dating a building, even those from the 18th and 19th centuries.
  - How are the timbers finished?
    - Rough-hewn,
    - Hand-finished,
    - Machine-finished,
    - Jointed or nailed?
  - What sizes of timbers have been used?
  - What shapes are the trusses?
    - King post
    - Queen post
    - Queen strut - how many struts?
    - Crown post
  - Are there both principal and common rafters?
  - Are there tie-beams and/or collar-beams?
  - Are there purlins?
    - How are they joined to the trusses and principal rafters?
  - Do any of the timbers show signs of re-use?
    - empty slots left by earlier joints
    - drilled holes
    - chamfers cut off without end stops
    - changes in surface finishing
  - If any former frame-panels are visible, are there grooves in these that might indicate earlier wattle-and-daub?
  - Is there any smoke-blackening on the timbers?
    - Is this general or limited to a particular area of the roof?

- Are there any carpenters' marks?
- Are there any signs that the roof space, or part of it, might have been used for anything other than informal storage?
  - Is the roof space floored?
  - Are there signs of blocked earlier windows, or later-inserted windows?
  - Are there signs that the walls might have been painted?
  - Have any frame timbers been cut away at a later time?
  - Are there signs of trapdoors or former staircases?
- Do changes in the joist or floor level, changes in the style of framing, or earlier internal partitions indicate changes to the shape of the building over time?
- Cellars
  - Pay particular attention to floor and wall surfaces, as these may provide clues to the original construction of the building. Parts of the cellar and foundations may even date from an earlier building on the site.
  - Has the cellar space been used at any time for any function other than storage?
  - Is there a fireplace?
  - Does the floor plan of the cellar match that of the building above?
- Old timber work may also be visible inside cupboards and under stairs. These areas are often missed during updating, so may retain original features removed elsewhere.

Now make a third estimate of the date of the building based on its roof construction:

Does this agree with earlier estimates based on external appearance and internal features? If not, what does this indicate about the history of the building?



This concludes the field survey of the building itself, though you may need to make further visits to check details once you start writing up your report.

It may also be necessary to survey ancillary buildings – for instance barns and other farm buildings – because these may provide clues to the functions and historical changes over time of the building site as a whole.

Before you leave the building, however, ask the owner whether he or she has any documentary evidence about its history. If so, this will be a good start for Step 5.

**STEP 5:****Documentary records of the building**

Most house owners have some information about the history of their property, but this should be supplemented anyway with information from local history libraries and information on the web. Record the following:

- Location, full address and postcode.
- The building's current owner (and his/her phone number), and any previous owners if known. The electoral register or national census records are sources here.
- The building's Ordnance Survey grid reference, from the local OS map.
- The building's position on a large-scale local map, showing boundaries, roads, neighbouring buildings, fields, streams and so on.
- Is the building 'listed'? If so, it's listing details will be found on the web at [www.imagesofengland.org.uk](http://www.imagesofengland.org.uk).
- Is the building recorded in Pevsner's Buildings of England series? Copies will be in the local studies library.
- Have any other historical surveys been done, for example the RCHME. A good starting point is the English Heritage website at [www.english-heritage.org.uk/your-property/about-my-property/](http://www.english-heritage.org.uk/your-property/about-my-property/).
- Are there any local historic maps which show the building? Again, the local studies library can help.

Does any of this documentary evidence confirm or contradict the dating estimate made as a result of the field survey?



**STEP 6:****Summarise the building as whole**

You should now be able to make a first shot at summarising the original construction features of the building, and later additions or alterations:

- Is it a recognized building type?
  - Former open hall,
  - Lobby-entry,
  - Hall and cross-wing,
  - Etc
  
- Does it have a recognized roof structure? (see standard roof types in the Illustrated Glossary)
  
- Are there any timber-frame features that might date the original construction? (see standard frame types in the Illustrated Glossary)
  
- Is there an earlier foundation, plinth or cellar?
  
- Any other unusual and/or important features that might suggest particular date(s)?
  
- Can later additions and alterations be dated?

Does this summary lead you to alter your estimate of the original construction date?

Why?

### STEP 7:

#### Summary and conclusions

You should now have sufficient observed information about the building to give:

- An estimate of the original date of construction based on all of the available evidence.
- Apparent conflicts in the estimate of original date.
- Significant historical features of the house.
- A suggested sequence for changes and additions to the building over time.
- The role of the building within the local community and environment.



These conclusions, with a summary of your observations of the building and the evidence that led you to your conclusions, will appear in your Report. For guidance on how to write this, see the 'Step-by-step Guide to Writing a Building Report' on the Bucks Archaeological Society website at [www.bucksas.org.uk/hbgresources.html](http://www.bucksas.org.uk/hbgresources.html).

In your report you should also be able to recommend:

- Areas where further evidence and/or expert interpretation are required.
- Whether a measured survey of the building should be carried out (if you haven't done one).
- Likely further sources for documentary evidence about the building and its past occupants.