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The Bernstein House: A Case Study

Margaret Anne Goldsmith Hanaw

The Bernstein House at 206 Gates Avenue has been owned by my family since 1874, when it was acquired by my great-great grandparents Henrietta and Morris Bernstein. Over the last 121 years it has been occupied by family members including great-great grandparents, a great uncle and aunt, grandparents, and parents. It has also been rented at various times.

I grew up there during the forties and fifties. My parents continued to live there until 1995. My emotional ties to the house were strong and the thought of selling it when it came under my stewardship was one I could not bear to consider. Since I did not plan to live there nor did I want to sell it, my options were to either rent it as a residence or an office. The first option was not economically feasible. The second option, to convert the property to an office through the process of adaptive reuse, was feasible. That option was made somewhat more attractive because of the federal historic preservation tax incentives available to convert qualified historic structures to commercial use subject to depreciation.

For me however, the main reasons to retain and restore the house were not the economic incentives as much as the opportunity to keep the house in the family, and to attempt to correctly restore the house maintaining its historic 1924 decor and Colonial Revival Architecture. It was my opinion that if I had sold the house as a residence a typical purchaser would have wanted a different floor plan. They would have likely enlarged the house changing the ratio of building to lot and altered the proportions of the dwelling in order to have a home convenient to today's lifestyle. In so doing a residential purchaser would likely have built a modern kitchen and family room, enlarged the bedrooms, modernized the bath, changed the traffic pattern and virtually destroyed the 1924 interior decor.

It was at this juncture that I decided to keep the house virtually as it was and rent it as an office. When a tenant was found I planned to rehabilitate the property according to the guidelines set forth by the federal government for historic preservation investment tax credit. I wanted to retain the 1924 decor of the Bernstein House in order to preserve in Twickenham one of the few examples of Colonial Revival style architecture that exists in the district today, and thus do my part to help preserve the diversity of styles that makes this historic district unique.

The historic preservation certification application is in three parts, each part must be reviewed by the Alabama Historical Commission and then sent to the National Park Service of the Department of the Interior for review and certification. Part 1, "Evaluation of Significance," is an evaluation of the property as to whether it qualifies for rehabilitation. The property must be either on the National Register or it must qualify as "contributing to the significance of a National Historic District and be a certified historic structure for the purpose of rehabilitation."

Part 1 of the application involved writing a complete description of the interior and exterior of the house with details of the three different restorations since it was built in 1818, as well as a site description. The last restoration occurred in 1924, Colonial Revival Configuration, the style the current restoration would be required to honor. It might be noted that my own taste might have dictated deviation from maintaining the Colonial Revival style. I would have liked to remove some of the 1924 oak flooring and expose sections of the charming 1818 period random width tongue and groove wide pine floor boards. I would also have liked to remove the 1924 plaster covering of the 1834 brick fireplace and expose the old brick. It also would have been fun to find a good spot for a skylight or a stained glass window. However, none of these changes would have been considered maintaining the integrity of the 1924 decor, and could have disqualified the project for historic tax credit.

My experience in restoring the Bernstein House brought me to an understanding of the importance of remaining true to the architectural period of the property and not to be tempted to impose my own taste, or submit to personal whims in carrying out an historic restoration. To avoid these pitfalls I strongly recommend that anyone considering an historic restoration have someone familiar with the historic period to be maintained review all anticipated changes to the property.

The second section of Part 1 of the certification application required an explanation as to why the property was significant within the Twickenham Historic District where it is located, as not all properties within a historic district are necessarily significant. Two sets of photographs, maps of the immediate area from 1866 through 1913, and drawings of the existing floor plans completed Part 1.

In order to describe the various elements of the house for Part 1, I called on a local architectural historian and a local architect to assist me by supplying the correct terms to describe the various architectural details.

Although I wrote the description and the statement of significance of the Bernstein House myself, I would, if I were to attempt the project again or if I were to advise someone undertaking a similar project, suggest hiring a professional to write this part of the certification. The National Park Service requires a clear and complete description of both the interior and the exterior of the property, plus good photographic coverage, in order to make a determination as to its historic significance. A professional can do this quicker and with greater expertise than someone without professional background.

After Part 1 is returned from the National Park Service and the property is deemed historically eligible for restoration, Part 2 is submitted. Part 2 of the certification, "Description of Rehabilitation," requires a complete description of the anticipated rehabilitation plus illustrations and details through drawings and two sets of photographs. The descriptions of the existing conditions and the anticipated work plus the accompanying photographs, must be presented according to the instructions with no deviation, or else the application is returned for correction.

The Park Service requires that Part 2 be submitted before any work is begun, as the anticipated work and methods to be used might not meet requirements. By submitting Part 2 before work is begun, the Park Service has the opportunity to point out areas of work anticipated that do not meet requirements. Changes can then be made prior to beginning work. In the case of the Bernstein House, I was unable to wait for the Park Service to respond to Part 2 as I had a tenant requesting occupancy within three months, not sufficient time for the Park Service to respond. It takes two months for each of the three parts of the certification process.

By proceeding with the work I risked losing the investment tax credit if some of the procedures had not met approval. For example, I considered removing the 1924 radiators since a central HVAC system was to be installed. I later decided to allow them to maintain the 1924 interior decor. Fortunately this was the right decision, as the tax credit might have been disallowed had the radiators been removed.

I was fortunate in that the proposed work for Part 2 was approved, although at the time the approval was received the work was already completed. My advice in this case, and the procedure I would follow in the future, would be that when work has to proceed before Part 2 can be approved, review the proposed work with a qualified architect familiar with historic restorations. In addition, I would also suggest reviewing proposed

work with the Alabama Historical Commission. If time allows and someone is available, I would ask someone from the staff of the Alabama Historical Commission to make a personal visit and inspect the property and my restoration plans, at my expense, in order to review the proposed alterations for suitability.

The third part of the Certification Application is "Request for Certification of Completed Work." This part requires the completion of a simple one-page form and two sets of photographs duplicating the sets sent with Parts 1 and 2, showing every aspect of completed work. Like the first sets of photographs, these sets must include certain details including address, name of property, date of photograph, view, and details as to what is being shown written on the back of each photograph. If the work is approved, the Secretary of the Interior then returns the form stating that the rehabilitation meets the Secretary of the Interior "Standards for Rehabilitation," and is consistent with the historic character of the property or the district in which it is located. Twenty percent of the cost of the rehabilitation is then eligible for historic preservation tax credit. The remaining eighty percent of the cost is capitalized and depreciated according to the straight line method.

The restoration of The Bernstein House at 206 Gates Avenue, has been a challenge and a learning experience. I began the process without realizing the many pitfalls present along the way, in particular possibly making alterations that would have disqualified the project for historic preservation tax credit. I also did not realize the difficulty for a person like myself, with no background or knowledge of historic architecture, to complete the certification application. I was fortunate and lucky that certification was approved for the Bernstein House.

I thought that my experience and suggestions might be helpful to someone attempting a similar project. Hopefully my experience might encourage someone wondering whether or not to attempt an historic restoration, to do so. This was the reason, when asked to share the completed forms and photographs of my historic preservation certification of the Bernstein House with the Huntsville community through the Historic Huntsville Foundation *Quarterly*, I agreed.

Although each historic restoration is unique, a copy of the completed forms for the Bernstein House can serve as a sample guide to anyone following the application instructions and completing their own set of forms for historic preservation certification. Good Luck!