



REMEMBERING ORANGEBURG

Feasibility of a New Museum

MIT USA LAB

Rahul Agarwal
Dela Gbordzoe
Celi Khanyile-Lynch

July 2019
Executive Summary
Remembering Orangeburg: Feasibility of a New Museum

In January 2019 the SC Association for Community Economic Development (SCACED) and the Rural Resource Coalition SC (RRCSC) were awarded the unique opportunity to partner with the MIT Sloan School of Management's (MIT) USA Action Learning Lab. Action Learning Labs at MIT are courses in which students apply their business and organizational work experience and their classroom learning to a real time semester-long partnership in the field. As a Community Partner SCACED/RRCSC engaged MIT graduate students to identify and assist with a project relevant to our work, community and culture, and material to the success of our region's local economy. **To that end, SCACED and RRCSC concentrated on African-American history and heritage-based tourism, specifically a Feasibility Study on the viability of a civil rights museum/education center on the site of the former Triangle Bowling Alley in Orangeburg.**

First piloted in 2018 by *MIT's Good Companies, Good Jobs Initiative* and the Sloan Action Learning Program; this Lab is a response to the economic, social and political chasms that currently define the American experience. The focus of the 2019 Action Learning Lab, entitled *Bridging the American Divides: Work, Community and Culture*, aims to highlight various and prevalent national divides: rural/urban; digital; racial; and income inequality, to name a few. More information on this MIT program can be found at: <https://gcgj.mit.edu/>.

SCACED/RRCSC worked with three (3) MBA students: Celi Khanyile-Lynch; Dela Yawo Mortia Gbordzoe; and Rahul Agarwal during MIT's 2019 Spring Semester. Each of these students is a first generation American with families emigrating from South Africa, Ghana, and India respectively. Their unique experiences and global perspectives are reflected in the Feasibility Study and therefore, SCACED has not edited their work in any significant manner. Students spent two (2) weeks touring Orangeburg and other similar areas and worked remotely for the duration of the semester. The Orangeburg work is specifically featured on MIT's website: <https://gcgj.mit.edu/usa-lab-featured-news>

While a Civil Rights Museum in Orangeburg has long been considered and SCACED/RRCSC do *not* agree with *all* the study's findings and recommendations, it is SCACED/RRCSC's hope that the following study will serve as a beginning document to launch serious community dialogues and build upon the MIT students' evident enthusiasm.

Study's Key Findings:

1. African American tourism is the 3rd fastest growing tourist segment in USA with and more than any other group, are likely to visit locations with cultural and historical significance.
2. International Tourists to SC represents approximately 5%; the numbers of tourist from Europe are increasing. Beginning in April 2019, British Airways offers direct flights between Charleston and London to meet consumer demand.
3. International tourists typically stay longer and frequently drive to visit multiple sites/cities. African American history resonates with cultural travelers of all types.
4. Increasing African American tourism in SC by 5% would increase the state's economic benefit by approximately \$120M

5. The *US Civil Rights Trail* (launched in 2018 and representing 14 southern states) generated an estimated 13 million visits to member sites during its inaugural year. European travel agencies are designing itineraries based on the trail.
6. Orangeburg is listed on the *US Civil Rights Trail* but directs tourists to a commemorative plaque only; domestic and international markets exist for “something to see or do” at the bowling alley site.
7. Analysis of comparable sites (pgs. 13-18), the study projects annual visitation to the Orangeburg Civil Rights Museum at roughly 20,000 (pgs.23-25).
8. In 2018 Orangeburg County collected \$1M from the penny sales tax to support a civil rights museum.
9. The study estimates of cost of \$10M to complete the Orangeburg Civil Rights Museum (pg. 26).
10. While state and federal political support has long existed, a local champion is required to steer the Orangeburg Civil Rights Museum to completion.



Introduction	3
Background & History	3
Scope and Purpose of this Study	9
Comparable Analysis and Key Trends	10
Key Trends.....	10
Analysis of Comparable Sites.....	12
Suggested Use of Space.....	18
Messaging & Vision	18
Museum Design	20
Adjacent Spaces	21
Market Analysis and Projected Attendance.....	23
Capital Funding and Financial Projections	26
Fundraising & Partnership Opportunities	27
Partnership Opportunities.....	27
State, Local & Federal Fundraising Opportunities.....	29
Private National Organizations.....	30
Key Challenges	32
Summary of Recommendations.....	33
Next Steps.....	36
KEY References	38
Appendices	39
APPENDIX – A – Stakeholders and Interviewees	39
Appendix B – Projected Museum Attendance.....	41
Appendix C- Estimated Initial Capital Investment.....	44
Appendix D- Financial Projections: Years 1-10	45
Appendix D- Financial Projections: Years 1-10 Continued.....	46

INTRODUCTION

Background & History

The South Carolina Association for Community Economic Development (SCACED), a non-profit based in Charleston, South Carolina, engaged with Massachusetts Institute of Technology Sloan School of Business (Sloan), after identifying the opportunity for economic revitalization and growth in Orangeburg, a small city in south central South Carolina. Sloan deployed a group of Master's in Business Students to South Carolina to compose the following feasibility study with the goal of providing the necessary information to make a compelling case for erecting a museum in Orangeburg at the site where, in 1968, a violent confrontation occurred between college students and police resulting in the death of three young men. Known as the 'Orangeburg Massacre,' this site in South Carolina is part of a larger goal of calling attention to Orangeburg as instrumental to the state's civil rights movement, as well as attracting tourism and economic opportunities to the area. The study outlines the economic, social and cultural benefits of such a museum and provides cost and revenue estimates associated with development and operations of the museum. Students conducted on-the-ground research over the course of two weeks in March and remotely between March and May of 2019.

ORANGEBURG

Orangeburg is located 37 miles from the state capital of Columbia, 76 miles from Charleston, and 115 miles from Hilton Head—all popular tourist destinations in South Carolina. The population of the county of Orangeburg is 86,934.¹ The population of the city is 12,954.² The city is 75% African American, 19.2% White and 1.74% Asian, followed by one percent or less for other races. ³ The county is 61% African American, 37% White and less than one percent for other races. ⁴

The county is anchored by two historically black academic institutions South Carolina State University and Claflin University. South Carolina State University is a four-year, public institution that offers bachelor's, master's, and doctoral degrees. The student population is 2,942; 2,534 are undergraduates. 97% of students receive financial aid and 77% qualify for federal loans. The undergraduate population is 94% African American,

¹ "U.S. Census Bureau QuickFacts: Orangeburg County, South Carolina." Census Bureau QuickFacts, www.census.gov/quickfacts/orangeburgcountysouthcarolina.

² "Population." Google, Google, www.google.com/publicdata/explore?ds=kf7tgg1uo9ude_&met_y=population&idim=sub_county:4553080&hl=en&dl=en.

³ "Orangeburg, South Carolina." Wikipedia, Wikimedia Foundation, 7 Mar. 2019, en.wikipedia.org/wiki/Orangeburg,_South_Carolina#Demographics.

⁴ "Orangeburg County, South Carolina." Wikipedia, Wikimedia Foundation, 31 Mar. 2019, en.wikipedia.org/wiki/Orangeburg_County,_South_Carolina#Geography.

2% white and 2% unknown. The overall graduation rate is 36% and the number of students who transfer-out before completing their studies at the institution is 21%.⁵ In contrast, Claflin University is a four-year, private institution that offers bachelor's and master's degrees. The student population is 2,129, 99% of which receive financial aid and 80% of which qualify for federal loans. The undergraduate population is 91% African American, 2% Hispanic, 2% American Indian, 1% Asian, and 1% White. The overall graduation rate is 53%.⁶

The low graduation rates at both Claflin and South Carolina State speak to a larger trend in Orangeburg, where the employment rate and median household income is low. The county has an unemployment rate of 6%, while the national average is 3.9% and the average in the neighboring county of Charleston is 2.8%. While the job market in Orangeburg has increased .6% over the past year, future job growth is expected to be 20.6%, which is lower than the predicted US average of 33.5%, as well as nearby Charleston, which is 35.9% and Columbia, which is 27.4%.⁷ The average income of Orangeburg residents is \$15,270 a year, compared to the US average of \$28,555. The median household income is \$28,967 a year, compared to the US average of \$53,482 and the average in Columbia, which is \$41,454 a year.⁸ Tax revenue collected in Q2 of FY 18-19 from a 2% tax on tourist accommodations (hotels, Airbnbs) in Orangeburg city was \$185,577 and \$94,372 in Orangeburg County out of the total \$11,732,384, which was collected by the State Treasurer.⁹ Admissions tax revenue, revenue generated by the county for admissions into tourist sites, declined by 10.6% to \$82,081 in FY19 compared to FY18—and was marked as one of the steepest declines in any county in South Carolina.¹⁰ The impact of domestic travel expenditures in Orangeburg is \$149M out of the state total of \$13B. Tourism generates \$25M in payroll for local employees and is related to the employment of 1,340 in the county. However, compared to Charleston, the revenue and economic impact generated from tourism is low. In Charleston, the economic impact of domestic travel expenditures is \$2B.

To compete with its neighboring counties, Orangeburg needs to invest more in marketing itself. The South Carolina Legislature provides matching funds to the state's largest destination marketing organizations (Myrtle Beach, Charleston, Hilton Head, Columbia, and Greenville) through Destination-Specific Funding. For FY18-19, Destination-Specific Funding is expected to total \$14 Million. These five destinations will spend a combined \$42M marketing their respective destinations.¹¹ This is a huge untapped market for Orangeburg to boost its economy which is in desperate need of economic revitalization. The county currently allocates a majority of its \$74M budget on public safety.¹² If it were to reallocate some of its budget to marketing, it could have tremendous economic benefits.

⁵ "No Schools Added." College Navigator - South Carolina State University, [nces.ed.gov/collegenavigator/?q=south carolina state&s=all&id=218733](https://nces.ed.gov/collegenavigator/?q=south%20carolina%20state&s=all&id=218733).

⁶ "No Schools Added." College Navigator - Claflin University, nces.ed.gov/collegenavigator/?q=claflin&s=all&id=217873.

⁷ Charleston, South Carolina Economy, www.bestplaces.net/economy/city/south_carolina/charleston.

⁸ Orangeburg, South Carolina Economy, www.bestplaces.net/economy/city/south_carolina/orangeburg.

⁹ Columbia, South Carolina Economy, www.bestplaces.net/economy/city/south_carolina/columbia.

¹⁰ "South Carolina 2% Accommodations Tax Revenue Distribution." SCRPT, <https://embed.widencdn.net/pdf/plus/scprt/nhuuebtr1s/A-Tax%20Revenues%20and%20Collections%20Q2%202018-19.pdf?u=sgt8lu>

¹¹ "South Carolina State-Wide 5% Admissions Tax Collections." SCRPT, <https://embed.widencdn.net/pdf/plus/scprt/vtp4hymdsj/admjanfeb19%20with%20map.pdf?u=sgt8lu>

¹² James D. "South Carolina Issues Marketing RFP - Everything PR." *Everything*, 2 Oct. 2018, everything-pr.com/south-carolina-issues-marketing-rfp/.

¹³ "Orangeburg County Basic Financial Statements and Supplementary Information." June 30, 2017. https://www.orangeburgcounty.org/Downloads/Financedocs/OBCNTY-FinReport_2017.pdf

As part of its marketing revamp, Orangeburg can and should leverage its position as having two large academic institutions nearby and fifteen sites included in the South Carolina Heritage Tour along The South Carolina National Heritage Corridor (SCNHC), which stretches 320 miles from the state's northwestern tip down through its southeastern corner near Charleston. 55% of African American visitors are unfamiliar with these sites along the Corridor. If the state was able to increase African American tourism by 5%, it would generate \$118.6M in revenue, 1,315 jobs, and \$39.5M in income for residents.¹⁴ This would help address the unemployment rate in Orangeburg and beyond.

In recent years, Orangeburg has been engaged in a downtown revitalization effort that is intended to bring economic growth to the area along the Russell Street corridor, where the site of this feasibility study is located. The efforts have been largely spearheaded by the Downtown Orangeburg Revitalization Association (DORA), a non-profit formed in 1993, funded in part by The City of Orangeburg along with support from Partners and dues-paying members. They have marketed themselves as making incremental, strategic progress by generating more retail occupancy downtown.¹⁵ They have been reluctant to explore alternative concepts to economic growth such as the establishment of a museum.

Any move to seek support from DORA would require working closely with the City Council to generate their support, as they fund DORA and have some political sway. The city is run by Mayor Michael Butler, the first African American mayor of Orangeburg. The Mayor is elected to serve a four-year term and serves as the presiding officer of the City Council and votes on all matters, as well as appoints citizens to all the committees and commissions. He is joined by six council members who are elected to serve four-year terms. They include Richard Stroman, Charles Jernigan, Charles Barnwell, Jr., Bernard Haire, L. Zimmerman Keitt, and Sandra P. Knotts.¹⁶ State Representatives include Jerry Govan, Jr. (District 95), Russell Ott (District 93), Lonnie Hosey (District 91) and Gilda Cobb-Hunter, first Vice Chair of the Ways and Means Committee (District 66). State Senators include Brad Hutto (District 40) and John Matthews (District 39).¹⁷ As the first African American elected official in Orangeburg since the Reconstruction, State Senator Matthews has been an advocate for civil rights projects in the area.¹⁸ Rep. Cobb-Hunter has also been a strong advocate.

Given conversations with the community, we recommend Rep. Cobb-Hunter and Sen. John Mathews, Jr. be considered as the politicians to champion this project. Rep. Cobb has relationships in the House of Representatives and a record of success getting legislation passed. Overall Orangeburg County is solidly Democratic in a Republican state.¹⁹ Sen. Mathews is also highly respected for his long and distinguished public service to the local community.

¹⁴ "Increasing African American Tourism in South Carolina" 2016. https://jc-associates.com/wp-content/uploads/2016/11/African_American_tourism_report_allPages-2.pdf

¹⁵ "Home." Downtown Orangeburg Revitalization Association, downtownorangeburg.com/.

¹⁶ "Council, Orangeburg City" http://www.orangeburg.sc.us/index.php?option=com_content&view=article&id=132:city-council-members&catid=3&Itemid=10

¹⁷ Jr, Bobby Etheredge. "LEGISLATIVE DELEGATION." *Orangeburg County, South Carolina Legislative Delegation*, www.orangeburgcounty.org/depts/electedOff/delegation.html.

¹⁸ Ellison, Matthew. "Home." *South Carolina Democratic Party*, 28 June 2017, scdp.org/legislator-spotlight-john-matthews/.

¹⁹ Times. "Orangeburg Is Key Place for Democrats." *The Times and Democrat*, 27 Mar. 2019, thetandd.com/opinion/editorial/orangeburg-is-key-place-for-democrats/article_c710939c-a4eb-52f0-a1fc-58c6f605d65d.html.

Having a wise politician who is passionate about civil rights and can champion the project is key to its success. The project will require rallying organizations such as DORA, with strong political ties to the City Council, as well as other local and state politicians. It is also important that Orangeburg work with its two anchor academic institutions in the process to help address the serious economic decline in the county. Furthermore, the county needs to leverage its resources and invest in a marketing campaign to qualify for matching funds that will generate more growth. All of these are factors that can make or break this project, which is tied to the economic success of Orangeburg.

SCACED

Founded in 1994, SCACED's mission is to improve the quality of life for low wealth families and communities by advancing economic development in industry in South Carolina.²⁰ As part of their mission, they uncover opportunities for economic revitalization across the state and partner with foundations and institutions that have the resources necessary to launch projects that will bring economic growth to underutilized areas. Since its founding, the non-profit has had record success in identifying promising projects valued at \$100 million, with an economic impact in South Carolina of \$250 million. Through SCACED's members and partners, they have created over 6,000 jobs, building wealth in rural and distressed communities.²¹

Under the leadership of civil rights activist and United Methodist Church ordained minister Bernie Mazyck, the non-profit has committed to not only building wealth, but addressing deteriorating race relations and economic stratification through partnerships with organizations like Prosperity Now, which develops scorecards of where states, counties and cities fare when it comes to financial outcomes and equality with the intention of jump-starting growth in areas that score poorly.

Given the county's potential with two renowned historically black universities (South Carolina State and Claflin) and the county's African American history, Orangeburg caught SCACED's attention and prompted MIT's engagement in the community, although it fared poorly on Prosperity Now's recently released scorecard. The non-profit engaged local community leaders, who in addition to DORA, have spent significant time trying to revitalize the main corridor of Orangeburg. They identified the 'Triangle Bowling Alley,' as the most compelling site to foster further growth within the corridor given its history and the community's connection to it. The bowling alley was the site of racial segregation in 1968 at the height of the civil rights movement. In line with its mission, SCACED identified the bowling alley as the opportune site to generate economic growth, as well as awareness of Orangeburg's role in civil rights, in hopes of addressing racial/economic stratification in the area.

²⁰ "Who We Are | SCACED." SCACED, www.scaced.org/who-we-are.

²¹ "People & Places 2017." People & Places 2017, peopleplaces.topi.com/speaker/bernie-mazyck-BJ3qi.

ORANGEBURG: HISTORY

In order to paint a compelling case for the acquisition and conversion of the Triangle Bowling Alley into a museum to commemorate the Orangeburg Massacre in 1968, it is important to grasp the pivotal role that Orangeburg had in civil rights history and monumental laws that were passed as a result of local efforts.

From 1952-54, less than an hour 's drive from Orangeburg, in Clarendon County, Harry Briggs, one of twenty parents of color, filed a lawsuit against RW Elliott, president of the school board, for unequal educational facilities, equipment, curricula and opportunities afforded to students of color. The case Briggs v. Elliott drew national attention, which elevated the case to the Supreme Court to be presented as the first of five cases combined in the Brown v. Board of Education case in 1954; as a result, racial segregation in public schools was declared unconstitutional.²² Despite the ruling, racial segregation continued and two months after the historic Supreme Court's ruling, parents, teachers, and students at the private black academic institution Claflin University and public institution South Carolina State in Orangeburg sprang into action to eliminate segregation in its schools by staging boycotts—some teachers even resigned. It was labeled 'The Orangeburg Freedom Movement.'²³

Despite this, segregation persisted in other public and private spaces. Orangeburg students continued to protest as a result. In 1956, following the bus boycott in Montgomery, Alabama, Orangeburg students started the Black Student Movement, which involved marching, demonstrating, and initiating the first wide-scale economic boycott in the southern United States. These actions did not garner national press attention and preceded the well-known sit-ins in Greensboro, North Carolina in 1960. Yet in 1960, Orangeburg students staged sit-ins at South Carolina State and Claflin University. In the subsequent year, 1961, Claflin students protested in segregated houses of worship and educators challenged segregation at the Orangeburg Regional Hospital.²⁴ It was these efforts of Orangeburg's black community that was the genesis for the 1964 Civil Rights Act that deemed racial segregation illegal and the 1965 Voting Rights Act that outlawed discriminatory voting practices.

Despite these core pieces of legislation, racial segregation in South Carolina persisted. Black students continued to be barred from entering private spaces in Orangeburg and on February 8, 1968, their resistance to these unequal practices led to the largest civil rights tragedy in the county—the Orangeburg Massacre. The massacre arose out of a series of peaceful student protests. Between 1965 and 1968, South Carolina State College and Claflin University students tried to integrate the Triangle Bowling Alley, located less than a mile from their campuses, and were met with resistance. It was these efforts that were the catalyst for protests that were held over the course a week, beginning on February 5, 1968, when John Stroman, a young black man, was refused entry. Roughly 300-400 students joined Stroman to protest in front of the bowling alley. Chief JP Strom of the State Law Enforcement Division (SLED) reported to the site on Day Two of the protests at Governor Robert E. McNair's direction. He called in 50 law enforcement officers.²⁵

²² "Briggs v. Elliott." *Wikipedia*, Wikimedia Foundation, 5 Apr. 2019, en.wikipedia.org/wiki/Briggs_v._Elliott.

²³ Williams, Cecil J. *Out-of-the-Box in Dixie: Cecil Williams' Photography of the South Carolina Events That Changed America*. Cecil J. Williams Photography/Publishing, 2010.

²⁴ Williams, Cecil J. *Out-of-the-Box in Dixie: Cecil Williams' Photography of the South Carolina Events That Changed America*. Cecil J. Williams Photography/Publishing, 2010.

When students continued to protest, McNair called in the National Guard to control the situation. On the night of February 8th, 66 state patrolmen, 45 national guardsmen, 25 SLED agents, and 28 local police invaded the South Carolina State College campus, where student protests had migrated. 395 other National Guardsmen were on duty, along with 61 state patrolmen nearby.²⁶ In officers' attempts to break up the peaceful protests, they killed Samuel Hammond Jr, Henry Smith, and Delano Middleton and seriously wounded 27 students. Following state and FBI investigations, the nine officers were billed for using excessive force at the campus protest, but none were convicted. One student activist, Cleveland Sellers, SNCC and NAACP youth chapter leader, was convicted for inciting to riot and served seven months despite his non-violent role in the student protest.²⁷

The role of the students and lack of police accountability associated with the massacre remains untold and unknown by many on a local and national level, as it was clouded by the assassination of renowned civil rights leader Dr. Martin Luther King, Jr. who was killed two months later in Tennessee. However, the Orangeburg Massacre was the first of its kind on a school campus and the efforts of Orangeburg students paved the way for future students to speak out against injustices, the most notable include the 1970 Kent State shootings and Jackson State killings in which the National Guard and state highway patrol killed student protestors who demonstrated against the US invasion of Cambodia.²⁸

ORANGEBURG'S INVESTMENT IN PRESERVING THE HISTORY THUS FAR

In an attempt to raise awareness with respect to the significance of the Orangeburg Massacre in civil rights history, Orangeburg County allocated \$1M from last year's penny sales tax to create the museum. There are a few components that have posed a challenge, including the registration of the bowling alley as a historical landmark in 1996, which has increased the value of the site, which closed in 2007.²⁹ Local Champions are needed to revisit the purchase of the site and continue to move the museum project forward.

²⁵ Bass, Jack, and Jack Nelson. *The Orangeburg Massacre*. Mercer University Press, 2002.

²⁶ Bass, Jack, and Jack Nelson. *The Orangeburg Massacre*. Mercer University Press, 2002.

²⁷ Bass, Jack, and Jack Nelson. *The Orangeburg Massacre*. Mercer University Press, 2002.

²⁸ "Orangeburg Massacre." *Wikipedia*, Wikimedia Foundation, 1 Apr. 2019, en.wikipedia.org/wiki/Orangeburg_massacre.

²⁹ Zaleski, Gene. "Historic Bowling Alley Closes Doors - Investors Looking at All Star, Focal Point of the 'Orangeburg Massacre'." *The Times and Democrat*, 16 Sept. 2007, thetandd.com/news/historic-bowling-alley-closes-doors---investors-looking-at/article_43505c9e-a1a9-5630-bdb9-ccba9b2710fa.html.

Scope and Purpose of this Study

Our team will provide SCACED and the City of Orangeburg with a compelling business case for the need of a museum that documents the history of the civil rights movement in Orangeburg, at the site of the ‘Triangle Bowling Alley’. In order to meet the stated objectives, we:

- Interviewed Orangeburg leadership, as well as affiliates and partners of SCACED who provided insight on the project. (See Appendix for full list.)
- Reviewed and analyzed background material, as well as data, on the Tourism industry, demographics, history, and economic development in Orangeburg and its universities. Identified key trends.
- Toured the site of the proposed museum, the ‘Triangle Bowling Alley,’ and other abandoned buildings along the strip where the bowling alley exists.
- Evaluated the social and cultural impact of the museum through interviews with the local community and literature reviews.
- Selected comparable sites in the civil rights museum landscape that serve as benchmarks to compose a qualitative and quantitative analysis of the potential impact of the museum.
- Convened a focus group of leadership in Orangeburg who provided suggestions on the messaging, use of space, and exhibitions to be housed in the bowling alley. The group also provided suggestions for the use of adjacent space along the strip, which the owner proposed renting out to the community to house related activities.
- Conducted a market analysis of existing businesses and museums, residents, domestic and international tourism in the area, as well as an analysis of potential markets that we could tap into to attract visitors and business to museum, including nearby universities, family reunions and tourists that pass through Orangeburg.
- Composed projections for attendance, operating revenue, and expenses (staffing, exhibit maintenance), as well as initial expenses related to the buildout of the museum’s capital investment.
- Scoped out the broader economic impact of the museum, including the tangible positive effects it could have on employment and adjacent businesses.
- Proposed fundraising strategies for the museum, including strategic partnerships that could be formed with both public and private institutions, including philanthropic foundations, individual donors, as well as the city, state and federal government, to both address immediate and long-term funding needs.
- Identified the key challenges associated with pursuing the conversion of the bowling alley into a museum.
- Outlined an implementation plan and timeline for completion of the museum.

COMPARABLE ANALYSIS AND KEY TRENDS

To understand the potential of the proposed Orangeburg museum, we first need to examine the broader market forces working in favor this kind of attraction. This section outlines key trends in African American and historical tourism. We then highlight a few selected museums that share similarities with the proposed site in order to learn from their experience and inform our implementation strategy.

Key Trends

AFRICAN AMERICAN TOURISM IS GROWING

South Carolina tourism has boomed in the last five years. The number of visitors to Charleston alone has increased on average by 47% from 2013 - 2017. Of these visitors to the state, African American tourists are becoming an increasingly influential segment. A study by Mandala Research in 2011 identified African American tourists as the 3rd fastest growing tourist segment in the U.S., with a total spend of \$48 million. By 2018, this figure had grown to \$63B, a 31% increase over 8 years.³⁰ The majority of these consumers live in Southern cities and traveled within the south, with 37% of trips in 2010 taken to the Southeast.³¹

In 2016, the USC Department of Tourism and Hospitality commissioned a report to understand the opportunity for African American cultural tourism and attracting African American tourists. They identified that African American travelers, more than any other group, are likely to visit locations with cultural and historical significance. However, the study found that while South Carolina possesses a wealth of over 470 African American cultural sites and attractions, most are not maintained or promoted and lack infrastructure; as a result, the state is missing a huge cultural and economic opportunity. The study projected that increasing African American tourism by just 5% would bring \$118.6M in economic benefits to the state.³²

THE RISE OF INTERNATIONAL TOURISM

International tourists have also become an increasingly important tourist demographic for South Carolina. According to Duane Parrish, Director of the South Carolina Parks, Recreation, and Tourism Department, 4-5% of the total economic impact from tourism came from international visitors. The bulk of these tourists come from Canada, but more and more are coming from Europe, with Germany and the UK being top countries of origin.³³ In fact, European demand has grown so much that starting April 4, 2019, British Airways introduced a new direct route from London Heathrow to Charleston International Airport to service the growing demand.

³⁰ Mandala Research. "African American Travel Represents \$63 Billion Opportunity." *GlobeNewswire News Room*, "GlobeNewswire", 20 Dec. 2018, www.globenewswire.com/news-release/2018/12/20/1670310/0/en/African-American-Travel-Represents-63-Billion-Opportunity.html.

³¹ "Increasing African American Tourism in South Carolina" 2016. <https://jc-associates.com/wp-content/uploads/2016/11/African-American-tourism-report-allPages-2.pdf>

³² "Increasing African American Tourism in South Carolina" 2016. <https://jc-associates.com/wp-content/uploads/2016/11/African-American-tourism-report-allPages-2.pdf>

³³ Williams, Emily. "Economic Impact of Tourism in SC Grew Again, Reaching \$22.6 Billion Last Year." *Post and Courier*, 20 Feb. 2019, www.postandcourier.com/business/economic-impact-of-tourism-in-sc-grew-again-reaching-billion/article_32269c48-2e31-11e9-816d-771fa777b39.html.

These international travelers tend to stay longer than their American counterparts, and they frequently drive to visit multiple cities. The average Canadian family's trip to South Carolina lasted 8 days in 2017.³⁴ These international travelers, especially in Europe, have demonstrated a strong desire to learn more about the African American history and the struggle for civil rights in the Deep South. This interest has been fueled by the wildly successful launch of the Civil Rights Trail (see below), with several European tour operators designing tours specifically focused on civil rights history^{35,36}. According to the Mandala Research Group:

“WE’VE BEEN ABLE TO CONFIRM THROUGH OUR MANY STUDIES ... THAT THE AFRICAN AMERICAN STORY IN AMERICA IS ONE THAT RESONATES WITH CULTURAL TRAVELERS OF ALL TYPES – THE GENERAL MARKET TRAVELER [AND] THE INTERNATIONAL VISITOR – BECAUSE THE STORY OF AFRICAN AMERICANS IS THE STORY OF AMERICA.”

THE CIVIL RIGHTS TRAIL & THE GREEN BOOK

The United States Civil Rights Trail, launched in 2018, is a coordinated marketing effort to promote a collection of over 100 pivotal landmarks in the struggle for civil and human rights in the U.S. It includes nationally famous sites, as well as lesser known landmarks in smaller towns, to emphasize that every community, big and small, took part in this fight. The effort is spearheaded by a collaboration of Travel South USA and the boards of tourism for 14 southern states, and it involves a unified website as well as joint promotional material³⁷. The launch has been wildly popular, with European travel agencies designing tours along the trail (see above). An estimated 13 million visits were generated to member sites in 2018³⁸.

Most importantly, Orangeburg is *already* featured on the civil rights trail, which directs tourist to a plaque located at the site of the original Massacre. However, tourism officials have admitted that the current site lacks an attraction “with something to see or do” and they would welcome a more fully featured commemorative site.

Additionally, the “Green Book” of South Carolina, created by the SC African American Heritage Commission and launched by the SC Department of Parks, Recreation, and Tourism, is mobile application to help promote the state’s trove of African American history. The app guides travelers through a catalog of large and small African American historical sites, however, as noted by the USC African American Tourism Study, most of these sites are severely under maintained and lack tourism infrastructure, hampering their growth.

³⁴ Parish, D. (March 2019.) Personal Interview.

³⁵ Ikeda, Emilie. "Southern States Band Together to Create First Unified Civil Rights Trail." *Fox News*. FOX News Network. Web. 13 May 2019.

³⁶ Enelow-Snyder, Sarah. "First U.S. National Civil Rights Trail Seeks International Tourism Appeal." *Skift*. Skift, 10 Jan. 2018. Web. 13 May 2019.

³⁷ Enelow-Snyder, Sarah. "First U.S. National Civil Rights Trail Seeks International Tourism Appeal." *Skift*. Skift, 10 Jan. 2018. Web. 13 May 2019.

³⁸ Ikeda, Emilie. "Southern States Band Together to Create First Unified Civil Rights Trail." *Fox News*. FOX News Network. Web. 13 May 2019.

Analysis of Comparable Sites

In this next section, we do a deep dive on a few selected historical sites and museums that share similarities with the proposed Orangeburg museum. Our goal is to learn from existing institutions to inform a sound, well-reasoned business plan. In particular, we will examine each site's **attendance, market, operations, and finances**.

LARGER AFRICAN AMERICAN HERITAGE SITES

Legacy Museum (Montgomery Alabama) This new museum opened on April 26, 2018 by the Equal Justice Initiative (EJI), a non-profit organization whose primary mission is to end mass incarceration and excessive punishment by providing legal services to fight racial and economic injustice. Their new Legacy Museum traces the history of violence and control over America's black population, starting with slavery, through segregation and into today's era of mass incarceration. This museum has seen historic levels of attendance, with an estimated 300,000 visitors in its first six months of opening³⁹.



Credit: museumandmemorial.eji.org

The museum has had a star-powered backing. The museum's concept and development was driven by well-known activist and lawyer Bryan Stevenson, founder of the EJI. Al Gore spoke at the museum's opening summit⁴⁰. Another component of the site's success has been the interactive, multimedia exhibits that provide visitors with an immersive and visceral experience with its subject matter. The EJI partnered with Google's philanthropic wing, Google.org, to integrate technology into their exhibits. One particularly memorable exhibit is a mock prison phone booth, in which the visitor sits down and speaks with a recording of a prison inmate who shares their story of being wrongfully convicted and the damage done to their lives. The power of these exhibits to connect with older and younger audiences alike informs **our recommendation that the Orangeburg Museum prioritize the development of interactive, multimedia content** to bring their history to life.

³⁹ Adams, A. (March 2019.) Personal Interview.

⁴⁰ "The National Memorial for Peace and Justice." *Wikipedia*. Wikimedia Foundation, 01 May 2019. Web. 13 May 2019.

The Penn Center (St. Helena's Island, SC) The Penn Center, formerly the Penn School, was one of the country's first schools for educating former slaves. It sits on a large swath of mossy land, about an hour away from both Charleston and Hilton Head. We chose this site because not only is it an important institution in African American history, but it also provides an example of the potential for a well marketed, well maintained African American cultural site that requires tourists to travel outside of major tourist cities.

The Penn center is an official part of the Civil Rights Trail and benefits from its promotion. The site also offers multiple uses, providing event and conference hosting space to generate additional revenue to museum admissions. It also hosts the PACE program, an after-school and summer academic enrichment and childcare program targeted at 6-18 year-olds. Overall, the Penn Center receives 30,000-40,000 visitors a year⁴¹, earning \$125,000 from direct admissions, \$41,000 from conference rentals, and **\$1.2 million** from its academic programs, **demonstrating the benefit of engaging K-12 students.**⁴²

OTHER SITES ON THE CIVIL RIGHTS TRAIL

F.W. Woolworth's building: International Civil Rights Center, i.e. The Sit-In Museum (Greensboro, NC)

The Woolworth's Building is the site of the famous 1960 protest where local students organized sit-ins to protest segregation and the treatment of black citizens (Wikipedia). We chose this site because, as with the proposed Orangeburg Museum, it commemorates a specific event in civil rights history, rather than an institution. Unfortunately, unlike the Orangeburg Massacre, the Greensboro sit-ins are a well-known historical event, with photos of the event being an iconic part of civil rights history. Commensurately, this site is very popular and had 72,000 visitors in 2017⁴³. Notably, 30,000 of these visitors came as part of school trips, reinforcing our decision to target schools as a key customer segment for the Orangeburg museum. While we don't expect the proposed Orangeburg museum to bring in the same volume of customers given the Orangeburg Massacre's lack of visibility, the Sit-In museum demonstrates the potential of a site that is focused on a single event and is 90 minutes away from the closest city (Charlotte).

⁴¹ *Penn Center National Historic Landmark*, discoversouthcarolina.com/products/672.

⁴² U.S. Department of the Treasury. Internal Revenue Service. (2017). *990: Return of Organization Exempt from Income Tax* (Cat. No. 11282Y). Retrieved from <http://www.irs.gov/pub/irs-pdf/p17.pdf>.

⁴³ U.S. Department of the Treasury. Internal Revenue Service. (2016). *990: Return of Organization Exempt from Income Tax* (Cat. No. 11282Y). Retrieved from <http://www.irs.gov/pub/irs-pdf/p17.pdf>.



Credit: CivilRightsTrail.com

The Moton Museum (Farmville, VA) The Moton Museum stands on the site of the former Robert Russa Moton High School, where students went on strike in April of 1951 to protest the inferior quality of their schools. This protest was thought to signal the beginning of the desegregation movement in the United States. We chose this site as a comparable because it shares many similarities with the proposed Orangeburg Museum: it is centered on a lesser-known event, located in a rural town, promoted as part of the civil rights trail, and is a renovation of an existing building. However, unlike Orangeburg, Farmville, VA is not

located near any tourism hub, with the closest city being Richmond, VA. Still, the Farmville site provides an important lower bound on how we can expect our museum to perform. In 2018, this small museum still managed to attract over 7,000 visitors, mostly from in-state tourists and school groups⁴⁴). While the site doesn't charge an admissions fee, it does host community events, and like the proposed Orangeburg museum, the Moton museum rents out event space for private functions.

RURAL SOUTH CAROLINA MUSEUMS



Elloree Heritage Museum and South Carolina Cotton Museum (Orangeburg County, SC) Lastly, we examine two museums that while not focused on African American history still provide valuable local data points. The Elloree Heritage Museum, located in Elloree, SC, is a small museum dedicated to educating visitors about the town's history as an old railroad town. The town is about an hour away from Columbia, and while it sits in the same county as Orangeburg, the town of Elloree is significantly smaller (750 versus 13,000)⁴⁵.

While we expect this museum to have significantly lower attendance than the Orangeburg museum because it is much more difficult to reach and is not promoted as part of the civil rights trail, from analyzing its finances **we can see how important fundraising events are for sustaining rural museums**. The Elloree museum hosts an annual "Low Country Boil" that is a major event for the town, in order to raise funds. It also hosts weekly adult

⁴⁴"Our 2018 Engagement Numbers." Moton News (Dec. 2018) <http://www.motonmuseum.org/wp/wp/wp-content/uploads/2018/12/Moton-Closing-Newsletter-2018.pdf>

⁴⁵"Elloree, South Carolina." *Wikipedia*, Wikimedia Foundation, 5 Oct. 2018, en.wikipedia.org/wiki/Elloree,_South_Carolina.

education classes, as well as smaller events like the popular “Sprint Follies”. Overall, about 80% of the Ellore museum’s operating revenues come from these kinds of events⁴⁶. In addition to the economic benefits, these events cement the museum as an anchor of the community and create goodwill and support amongst the townspeople. **With a larger community and ties to two local universities, the Orangeburg museum should be able to raise significant financing through local fundraising events.**

SUMMARY OF COMPARABLE SITES

Below is a table of summary statistics for our selected comparable sites that we used to inform our revenue, attendance, and budget projections in the following sections. Note that for many sites, direct attendance numbers were not available, but rather were estimated from Form 990 tax filings using some assumptions about average ticket prices. For more details on the assumptions used, see Appendix A.

It is also important to note that museums can fluctuate between profit and loss year over year, highlighting the importance of endowments and cash reserves to smooth out uncertainty. However, this does not indicate that these museums are not sustainable in the long run.

⁴⁶U.S. Department of the Treasury. Internal Revenue Service. (2016). *990: Return of Organization Exempt from Income Tax* (Cat. No. 11282Y). Retrieved from <http://www.irs.gov/pub/irs-pdf/p17.pdf>.

	Legacy Museum⁴⁷	Penn Center⁴⁸	Sit-In Museum⁴⁹	Moton Museum⁵⁰	Ellore Heritage Museum⁵¹
Attendance (2017)	500,000 ⁵²	40,000 ⁵³	72,000 ⁵⁴	8,376 ⁵⁵	1,000*
Approx. Sqft.	11,000 ⁵⁶	10,500	30,000 ⁵⁷	20,000 sqft. ⁵⁸	10,000 ⁵⁹
City Population	205,764 ⁶⁰	4500	269,000 ⁶¹	7,831	750 ⁶²
Admission Price	\$8 adult \$5 child \$0 student	\$7 adult \$3 child	\$12 adult \$10 seniors \$8 child	\$0	\$6 adult / \$5 senior / \$3 student ⁶³
Cost of School Programs	\$7/student \$10 / adult	Field Trip Options (No Extra cost)	Unknown	\$0 ⁶⁴	Offered upon request at no Extra charge
Event Hosting Space?	No	Yes (seasonal pricing)	No	\$50/hr. (\$25/hr. for non-profits orgs.) ⁶⁵	No
Hosting Space Capacity	-	86	-	100 – 200	-
Events / Festivals	None	Gullah-Geechee heritage days	Annual Black and White Ball (\$125/person)	Community Prayer Breakfasts (free) "Motown at Moton" (\$10/person)	Sprint Follies (\$40/person) Victorian Tea (\$20/person) Oyster Roast (\$20/person) iv Adult Education Classes
Days / Hours of operation	9am - 6pm Wed - Mon	9am – 4pm Tue - Sat	9am -6pm Mon-Sat	12pm - 4pm Mon- Sat	10am – 5pm Wed - Sat

⁴⁷ Hours, Admission, and event info obtained from <https://museumandmemorial.eji.org/visit>

⁴⁸ Hours, Admission, and event info obtained from <http://www.penncenter.com/plan-a-visit>

⁴⁹ Hours, Admission, and event info obtained from <https://www.sitinmovement.org/>

⁵⁰ Hours, Admission, and event info obtained from <http://www.motonmuseum.org>

⁵¹ Hours, Admission, and event info obtained from <https://www.elloreemuseum.org/>

⁵² Estimated from interview with Ashley Adams, EJI (March 2019).

⁵³ *Penn Center National Historic Landmark*, discoversouthcarolina.com/products/672.

⁵⁴ *Guidestar.org*, www.guidestar.org/profile/56-1856093.

⁵⁵ "Our 2018 Engagement Numbers." Moton News (Dec. 2018) <http://www.motonmuseum.org/wp/wp-content/uploads/2018/12/Moton-Closing-Newsletter-2018.pdf>

⁵⁶ "The National Memorial for Peace and Justice." *Wikipedia*. Wikimedia Foundation, 01 May 2019. Web. 13 May 2019.

⁵⁷ Swaine, John. "The International Civil Rights Center & Museum Exhibit Fact Sheet." *International Civil Rights Center & Museum*, 2018, www.sitinmovement.org/wp-content/uploads/2017/08/Fact-Sheet.pdf.

⁵⁸ "Our Community, Our Museum, Our Future – Looking Forward to a Future Together." *Moton Museum RSS*, www.motonmuseum.org/page/27/.

⁵⁹ Administrator, Site. "Our History." *Ellore Museum - Our History*, www.elloreemuseum.org/index.php/about/our-history.

⁶⁰ "Montgomery, Alabama." *Wikipedia*, Wikimedia Foundation, 25 Apr. 2019, en.wikipedia.org/wiki/Montgomery,_Alabama.

⁶¹ "Greensboro, North Carolina." *Wikipedia*, Wikimedia Foundation, 29 Apr. 2019, en.wikipedia.org/wiki/Greensboro,_North_Carolina.

⁶² "Ellore, South Carolina." *Wikipedia*, Wikimedia Foundation, 5 Oct. 2018, en.wikipedia.org/wiki/Ellore,_South_Carolina.

⁶³ "Ellore, South Carolina." *Wikipedia*, Wikimedia Foundation, 5 Oct. 2018, en.wikipedia.org/wiki/Ellore,_South_Carolina.

⁶⁴ 30 visits from k-12 schools, 15 visits from colleges & universities, 35 visits from community groups

⁶⁵ "Our Community, Our Museum, Our Future – Looking Forward to a Future Together." *Moton Museum RSS*, www.motonmuseum.org/page/27/.

Civil Rights Trail	Yes	Yes	Yes	Yes	No
Last Available Financials	None	2017	2015	2017	2017 - 2018
Annual Revenue (Contributions, Grants, Services, Investment)	Unknown	125,804* ⁶⁶	926,000	101,360	80,027
Annual Operating Expenses	Unknown	91,807* ⁶⁷	1,002,854	54,849	101,306
Salary Wage Expense %	Unknown	19% ⁶⁸	11%	2%	33%

⁶⁶Tigas, Mike, et al. "Penn Center Inc, Form 990 - Nonprofit Explorer." *ProPublica*, 9 May 2013, projects.propublica.org/nonprofits/organizations/570324930/201813219349300601/IRS990.

⁶⁷Tigas, Mike, et al. "Penn Center Inc, Form 990 - Nonprofit Explorer." *ProPublica*, 9 May 2013, projects.propublica.org/nonprofits/organizations/570324930/201813219349300601/IRS990. * The Penn center operates multiple revenue generating programs. This is the best estimate of the revenue/expense of only their museum

⁶⁸Tigas, Mike, et al. "Penn Center Inc, Form 990 - Nonprofit Explorer." *ProPublica*, 9 May 2013, projects.propublica.org/nonprofits/organizations/570324930/201813219349300601/IRS990.

SUGGESTED USE OF SPACE

This section sets forth our suggestions for the messaging and design of the museum, as well as the use of adjacent spaces.

Messaging & Vision

The Museum's mission statement should be to reinforce the legacy of Orangeburg and its youth in civil rights history, as a way to spark motivation and economic revitalization in the area. We recommend that the museum be marketed as **'The South Carolina Civil Rights Museum'** as many are not familiar with the Orangeburg Massacre, including those who live within the county, even though three African American students were killed. Furthermore, many are unaware of the ways in which the Orangeburg students' activism encouraged students across America to protest injustices. It is for this reason we suggest that the museum also market **the 'Power of Youth Activism.'** Throughout interviews with the community it became very evident that there is a lack of motivation, hope and inspiration among millennials in the area and a museum such as this one has the power to generate youth activism and hope for a brighter future. It is important that the messaging built out for this museum highlight the importance of youth engagement as it relates to this history of the Massacre and the future.

It is also important to paint a picture of Orangeburg as being at the **heart of the civil rights movement** when developing the museum's messaging. It is vital to not only craft a compelling case in support of the museum on the site of the Orangeburg Massacre, but also to place Orangeburg on the map of history, which often excludes the county's vital role. As part of telling a broader, more comprehensive history of the African American experience with respect to civil rights, Orangeburg has an essential place on the civil rights map, which can be reclaimed in this messaging. Once public consciousness is evoked, Orangeburg will become more **tightly woven into the fabric of civil rights history.**

Furthermore, a more complete story could be told by connecting the Orangeburg Museum to nearby museums, including the International African American Museum (IAAM) in Charleston, Cecil Williams's Museum in Orangeburg, as well as the Legacy Museum and National Museum for Peace and Justice in Montgomery, Alabama. IAAM in Charleston aims to share the history of the international slave trade and will connect visitors to their ancestors who landed at the ports in Charleston to be sold as slaves in the 1800s.⁶⁹ The National Museum for Peace and Justice aims to share the history of those who fled the South to escape slavery and became victims of racial terror and lynching between 1877 and 1950. The Legacy Museum, on the other hand,

⁶⁹ "About the Museum." *International African American Museum*, iaamuseum.org/about/.

focuses on the legacy of Jim Crow and inequalities that African Americans continue to experience in the criminal justice and prison system.⁷⁰ These histories can all be tied in chronological order to the Orangeburg Massacre in 1968. We seek to message the Museum as one of a cluster of museums that together tell a comprehensive story, with the visit beginning at IAAM, to get an anchored understanding of civil rights history. The IAAM messages itself as, “the hub for regional heritage, sending visitors across South Carolina to access additional African American sites.”⁷¹ We seek to build out that narrative.

The Orangeburg Museum would be messaged as **providing a deeper understanding of local activism** through multimedia platforms and while the focus of the museum would be on the history of the Orangeburg Massacre, it would also **cast light on the actions that built up to that moment**, including local action taken during Briggs v. Elliott, Brown v. Board of Education, and the Civil Rights Act. It would be messaged as providing a more in-depth understanding of Orangeburg’s role in civil rights and would be positioned to provide additional context to Cecil Williams’s Museum, which will showcase his photography in Orangeburg during the civil rights movement. By messaging all of the sites as part of telling a larger history of the African American experience, it creates a compelling case for the necessity of this museum and those nearby.

The case for linking these museums is supported by the South Carolina Department of Parks, Recreation & Tourism, which highlighted a spike in economic growth over the past year since more European tourists have come to learn about US civil rights history. To provide these tourists with a comprehensive understanding of civil rights history, the messaging for the IAAM, Legacy Museum, Cecil Williams’s Museum and the Orangeburg Museum must be linked. The leadership at the Legacy Museum and the IAAM both noted that in the 21st Century, social justice and equality are guiding factors for which people form their identities, connect with a place as well as form meaningful relationships within it. The Legacy Museum messages itself as “advancing our collective goal of equal justice for all” and providing “visitors with a powerful sense of place when they enter.”⁷² The IAAM messages itself as “presenting the largely under told experiences and contributions of Americans of African descent” and “connecting visitors to their ancestors.”⁷³ For the Orangeburg Museum to be successful, it needs to be tied to these messages. It is for this reason, it is advised that the Museum highlight social justice and youth activism in Orangeburg as it relates to the untold story of the Massacre in hopes that it will provide people with a sense of hope, purpose and connection to the place.

⁷⁰ “Museum an Memorial. Equal Justice Initiative.” <https://museumandmemorial.eji.org/>

⁷¹ “About the Museum.” *International African American Museum*, iaamuseum.org/about/.

⁷² “Museum an Memorial. Equal Justice Initiative.” <https://museumandmemorial.eji.org/>

⁷³ “About the Museum.” *International African American Museum*, iaamuseum.org/about/.

Museum Design

The museum design should also help ground visitors in the place. The museum should be designed to engage visitors through multimedia platforms in hopes of carrying them back to build personal connections to the history. The following proposal for the redesign and repurposing of the Triangle Bowling Alley includes:

- Projecting images of the student protests in 1968 on the walls of the entryway (outlined in blue, below). Sounds of bowling pins toppling over, a man refusing to let visitors in and students protesting would echo in the background to create the sensation that visitors are entering during the week-long protest. This interactive entryway is inspired by effective uses of multimedia in the entryways of the exhibits in the Legacy Museum and the National Museum of African American History and Culture.
- Installing a clear glass wall along the red line (outlined below) to create an illusion that you can enter and add to the visitors' frustration when they are unable to do so, so that they can relate to the sentiments that students of color felt when they were not allowed in.
- Converting and restoring the check-in area to the right of the entrance into an Admissions desk (see picture below). Visitors would be able to rent bowling shoes at the desk. To the left of the entryway, there would be a room for staff.
- Restoring six bowling lanes to their original function and allowing visitors to bowl. This would shift the paradigm of what was once an exclusive sport in this place to one that is an inclusive one.
- Installing a clear platform over all but six lanes in the bowling alley (see example below). The lanes are still intact; allowing visitors to walk over them as part of the exhibit, would create a feeling of walking back in time, since the bowling alley has not been restored. It also would create the feeling of inclusion since many of the individuals who would visit the museum would not have been able to enter the space previously.
- Breaking the exhibit space into two—the first area when you walk in would begin with the rise of student activism in Orangeburg in 1956, following *Briggs v. Elliott*. Then it would continue to document student activism in Orangeburg leading up to 1968. The second portion of the exhibit would be dedicated to the Orangeburg Massacre, and showcase the events that led up to February 8, 1968, when three students were killed by police and 27 were wounded.
- Partnering with HBO and Google's non-profit arm to create interactive media that would engage youth in the history. Similar to the Legacy Museum, the Orangeburg Museum would include documentary footage of the event that HBO can help restore and cutting-edge interactive technologies that would carry visitors back in time.

Adjacent Spaces

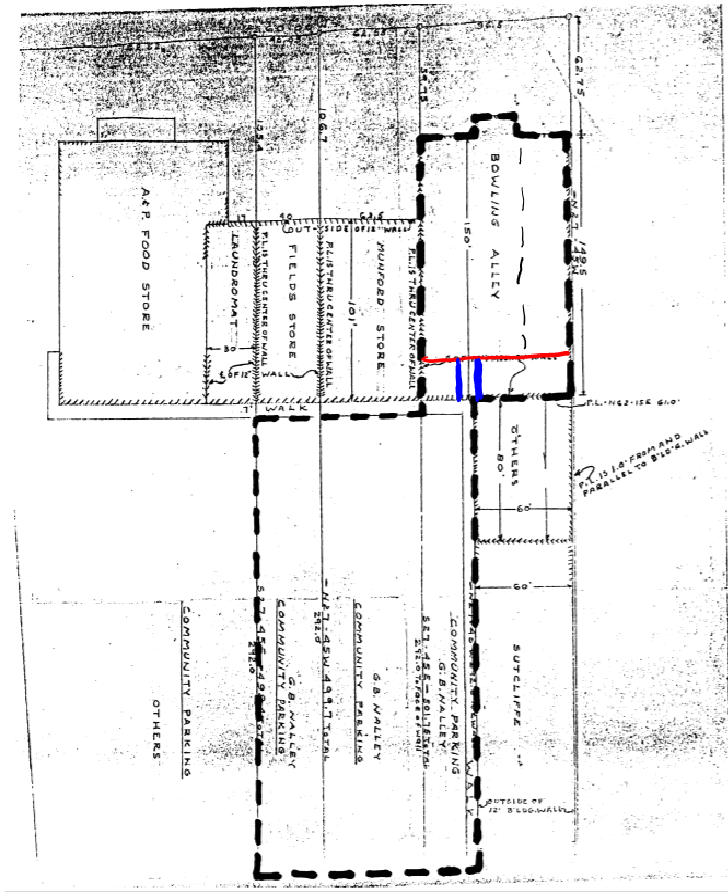
To not only attract tourism, but generate business development in the area, we recommend:

- Renovating and converting the adjacent stores south of the bowling alley, which were proposed for use by the owner.
- The smaller space closest to the bowling alley would be a cafe/gift shop that employs local chefs, baristas and students. It would serve as a meeting spot and social gathering place for both tourists and locals.
- The larger space would serve a dual function. It would be converted into a makerspace for entrepreneurs to develop and form their ventures and would be a space that can be rented out for events and performances. A makerspace would serve as a lab for students at nearby universities to experiment and grow their business ideas. The intention would be to set up partnerships with Clafin's and South Carolina State's academic departments to draw students to the space. The most popular degrees that students from South Carolina State University graduate with include Agriculture and related sciences and Business Management and Marketing. At Clafin they include Business, Management, Marketing; Biological and Biomedical Sciences; and Homeland Security, Law Enforcement, and Firefighting. Partnerships with each of these departments would be established to provide resources for students in the makerspace to further explore their interests, hone their skills, and develop startups that they could continue to grow upon graduation.⁷⁴
- BMW and Boeing would be recruited to invest in the makerspace, providing resources/technical tools for entrepreneurs who could partner with these companies to develop innovations. The makerspace would also include a performance space for local artists, including the students at South Carolina State and Clafin, to present to the community and hopefully serve as an additional way to convene the community. Individuals would be able to rent the space for private events as well, as there is currently no space like this that exists.
- The area to the left of the bowling alley (see floor plan, below), which was formerly 'Munford Store,' is currently a parking lot. We recommend that this lot be converted into a market, where local artisans/entrepreneurs can sell their wares. There would be room for food trucks to pull-in and sell local foods. Food trucks have gained a lot of traction in recent years and have served as good pilots for aspiring chefs to test out their vision as well as gain a customer base before launching their own restaurant, which requires more capital. This would serve the intended purpose of drawing economic development to the area.

⁷⁴ "No Schools Added." College Navigator - South Carolina State University, [nces.ed.gov/collegenavigator/?q=south carolina state&s=all&id=218733](https://nces.ed.gov/collegenavigator/?q=south+carolina+state&s=all&id=218733).

⁷⁴ "No Schools Added." College Navigator - Clafin University, nces.ed.gov/collegenavigator/?q=clafin&s=all&id=217873.

Floor plan for the Bowling Alley and adjacent buildings



Bowling Alley Entrance, Admissions Desk to the right.



Example of clear glass floor that will cover the bowling alley



75 Byrd, Caitlin, et al. "This S.C. Bowling Alley Was a Focal Point in Civil Rights History, but You'd Never Know It." *Post and Courier*, 8 Feb. 2018, www.postandcourier.com/news/this-s-c-bowling-alley-was-a-focal-point-in/article_111cc1ac-06a6-11e8-b198-03ba8aa80d05.html.

MARKET ANALYSIS AND PROJECTED ATTENDANCE

To forecast revenues and attendance, we segmented potential patrons into five segments: **residents, domestic tourists, international tourists, K-12 students, and University students**. Domestic tourists were then further divided by their reasons for travel. Overall, we predicted that the museum could comfortably achieve over 20,000 visitors a year once fully operational, which is well within the ballpark of our comparable sites (see Table 2). A detailed description of how we arrived at these estimates can be found in Appendix B. Our goal was to create relatively conservative forecasts to ensure that the new museum is sustainable. Below, we present our key findings and recommendations for each market segment.

RESIDENT MARKET

The city of Orangeburg, SC consists of about 13,000 people, 75% of whom are African American. While many citizens have a connection to the Orangeburg Massacre, either through family or by their university affiliation, we do not project significant long-term patronage of the museum to be sustained by Orangeburg residents. Rather, we see them as important champions for the development and maintenance of this site, as well as patrons for the auxiliary services such as the bowling alley, cafe, event space, and business incubator.

DOMESTIC TOURISTS

The South Carolina Department of Parks, Recreation and Tourism (PRT) segments domestic tourists into three groups: in-state leisure travelers, out-of-state leisure travelers, and travelers visiting family and friends (VFR). Of these, the bulk of domestic visitors is expected to come from the VFR segment.

Over 10 million people travel to South Carolina every year. This group also expresses the strongest interest in visiting cultural sites, with 11% of visitors expressing interest in visiting historical sites and 8% interested in museums (PRT Survey). Furthermore, African American tourists are more likely than any other group to visit friends and family and visit historical and cultural sites while visiting the state, implying they are overrepresented in this category. Overall, we expect that over half of the Orangeburg Museum's visitors will come from this group.

K-12 SCHOOLS

According to professional museum consultants, Lord Cultural Resources, on average school groups make up about 12% of attendance across all U.S. museums.⁷⁶ Based on data from comparables such as from the Sit-In museum (see above), we hypothesize that this figure has the potential to be *much higher* for sites related to civil

⁷⁶ "Muskoka-Heritage-Place-Phase-1-Analysis-and-Recommendations.pdf." *Google Drive*, Google, drive.google.com/file/d/12smqzMnl9qurKHBXyr2x5T7FWN4tQs29/view.

rights history. Based on data from the National Centers for Educational Statistics (NCES), there are about 190,500 K-12 students within a one-hour drive of Orangeburg. Furthermore, there are an additional 40,000 students in the Charleston metro area. Our conservative estimate is that from these students, the Orangeburg museum would be able to capture 4,000 visitors annually, making K-12 visitation about 20% of the Orangeburg museum's attendance. (See Appendix C for more details.)

Lord Cultural Resources suggests that in general, museums are much more likely to have groups visit from elementary school than from high school, as elementary school students stay with a single teacher throughout the day and have more flexibility in their schedules.⁷⁷ Therefore, **we recommend the site leverage the intellectual and human resources at the neighboring universities** to develop educational programming about the Orangeburg Massacre suitable for a younger audience. However, as mentioned below, **opportunities to interact with college students and faculty might provide a powerful incentive for high school visitors** as well. Therefore, as laid out in our final recommendations, building bridges between the museum and university is imperative for creating a successful venture.

INTERNATIONAL TOURISTS

As mentioned earlier, international visitors are a fast growing, lucrative group of South Carolina tourists. These visitors tend to stay longer, explore more cities, and spend more money than their U.S. counterparts. These factors, along with their observed fascination with African American history, led us to estimate that we could capture more of this segment than of the domestic tourist market.

Still, the volume of international travelers is far below that of domestic travelers. While the new British Airways direct flight from Europe should help increase this volume, international travel seems like it will be overshadowed by domestic travel in the near future. We project that combined international travel from Canada and overseas will only draw 1,400 visitors per year to the Orangeburg museum, roughly 6% of overall visitation.

UNIVERSITY STUDENTS

Because students at Claflin University and SC State University live as residents in Orangeburg, we don't expect them to visit the museum on a regular basis. Parents and alumni visiting for Parent's weekend, homecoming events, football, etc. could make an interesting target segment for the new Orangeburg museum, especially given their strong ties to the community. However, given that these two universities are relatively small (about 2,500 students each), we didn't expect this population to make up a sizeable museum customer population.

⁷⁷ Merkelson, N. (April 4, 2019.) Personal Interview.

However, we expect that university students will still provide valuable contributions to the museum by providing volunteer support, educational development assistance, and mentorship for school-age visitors. University students provide a valuable potential source of part-time and volunteer labor. Students can gain valuable experience while contributing to their local community. For the museum, students fill in vital gap in seasonal labor. Both HBCUs have strong programs in Business Administration, and to ensure that work experiences are valuable for students, **we recommend that the museum provide internships that combine routine customer service tasks with higher level business operational experience.** In addition to providing labor, **students should work with exhibition designers** to ensure that their history is told in a way that is **relevant** and **representative** of their experiences. The university could also offer some a form of “action learning” experience in collaboration with the museum during the year, to help students assist with both the museum’s business operations and its interpretive content design. This will deepen the institutional ties between the universities and museum and further establish the new site as a community institution.

Finally, Claflin and SC State students can serve as role models and mentors to the incoming K-12 students. Through formal mentorship programs and combined museum and college tours, university students can provide formal and informal leadership to the next generation of scholars. This benefits not only the younger students by giving them a vision of the future, but it also provides university students with a sense of purpose.

SUMMARY OF ATTENDANCE

Table 1 summarizes our estimates of the projected attendance once the museum is fully operational and promoted, which we estimate to occur two years after opening. As a reminder, these estimates were made using conservative assumptions, and we believe there is a reasonable chance they could be surpassed.

Table 1: Breakdown of Projected Attendance

Domestic	
Out-of-State Visiting Friends and Family	12,396
Out-of-State Leisure Travelers	1,471
In-State Leisure Travelers	1,120
Total Domestic	14,987
International	
Canada	1135
Europe / Other	244
Total International	1,379
School	
Regional Public Schools	3,011
Charleston Public Schools	614
Regional Private Schools	165
Charleston Private Schools	57
Total School	3,847
Total Projected Attendance	20,212

CAPITAL FUNDING AND FINANCIAL PROJECTIONS

Based off the attendance projections and market analysis performed of comparable sites, we estimate that the Museum can, with adequate fundraising and efficient operations, become a viable driver of value for Orangeburg and the State of South Carolina.

Table 3 - Capital Projections

Initial Capital Investment

Building (Bowling Alley)	\$	550,000
Construction/Architecture Consultants	\$	500,000
General Contractor	\$	800,000
Renovations (Bowling alley, Maker space, Café, Building structure renovations, Parking lot)	\$	4,500,000
Museum Consultants	\$	100,000
Initial Marketing Campaign	\$	35,000
Video Production for Exhibits	\$	20,000
Exhibit Material Acquisition Costs	\$	100,000
Food & Beverage Licensing fees	\$	10,000
Curator - Temporary/Consulting	\$	25,000
Lobbying/Fundraising Costs	\$	300,000
Initial Museum Endowment	\$	3,000,000
Capital Necessary To Fund Project	\$	<u>9,940,000</u>
Penny Sales Tax Revenue to Date	\$	1,000,000
Additional Capital Necessary to Break Ground	\$	8,940,000

As it pertains to raising capital (Appendix B), we estimate that the Museum's Foundation and the city of Orangeburg would need to raise about \$9.9M, inclusive of activities such as purchasing the building (\$0.6M), hiring a general contractor (\$0.8M), renovations (\$4.5M), and creating an endowment (\$3.0M). Exclusive of the funds already raised via the 1-cent sales tax enacted by the county, the city of Orangeburg and the Museum Foundation would have to raise about \$8.9M from outside sources to break ground and to ensure interest-bearing funds are available for operations for each year going forward. Not included in the capital plan was a line of credit for debt financing, but we do believe a line of credit is a viable option so long as interest rates remain historically low.


For operating revenues and expenses (Appendix D- Financial Projections: Years 1-10), we believe the Museum will receive \$0.5M of donations in the first year and total revenues of \$.8M, inclusive of ticket sales (\$.05M), bowling alley sales of \$.04M and food & beverage income (\$.05M). We expect the expenses to be \$.06M, comprising mainly of salaries (\$.3M), rent & utilities (\$.07M) and marketing expenses (\$.04M). We expect the Museum to remain net worth positive throughout the first ten years of operations, especially if Museum Foundation rents the building from the city. We expect a continual annual growth rate of 5% on all revenues and expenses after year two, when the attendance numbers grow and continue to stabilize.

FUNDRAISING & PARTNERSHIP OPPORTUNITIES


The Museum and the City of Orangeburg have solid opportunities for both strategic partnerships and government/private funding. Currently, Orangeburg has raised about \$1M for special projects via the 1-cent sales tax, and while that has been a great start for the funding of the Museum, there are still opportunities to grow. There has been an influx of large manufacturing and engineering corporations providing high paying jobs to high skilled workers in the region. This economic growth offers opportunities to leverage the resources of the Museum and event space. It also sets the stage to receive funding from national and local sources that will have a great interest in the success of the Museum and ensure that it's provided with the funds necessary to enrich the lives of the citizens of Orangeburg, the state of South Carolina and visitors from around the world.

The list of partnership and funding sources is not an exhaustive list but serves as an indicator of the resources available to the Museum's leadership team and the city/county of Orangeburg as they work to fund the Museum. The partners can not only be donors, but also can be contributors to the community on an ongoing basis.

Partnership Opportunities

Partner Name	Partnership Type
	Engineering, Manufacturing, Business Courses

	<p>Engineering, Manufacturing, Business Courses</p>
	<p>Engineering, Manufacturing, Business Courses</p>
	<p>Engineering and Manufacturing courses can be taught in the technical maker space.</p>
	<p>Classes for Black girls in the Orangeburg County School District who are interested in STEM education.</p>
	<p>Interactive programming for the Museum's exhibits</p>


	<p>Video programming for the Museum's exhibits</p>
---	--

State, Local & Federal Fundraising Opportunities

Funding Source	Description
<p>Darla Moore Foundation</p>	<p>The company's line of business includes the management of the funds of trusts and foundations organized for religious, educational, charitable, or nonprofit research purposes.</p>
	<p>Helps to build communities and move South Carolina forward as a state. SC Humanities reaches many rural areas, increasing the cultural capacity of local institutions and providing local economic impact.</p>
	<p>The Downtown Orangeburg Revitalization Association (DORA) is an organization dedicated to the revitalization of Downtown Orangeburg, which serves between Amelia Street to the North, John C. Calhoun Drive on the South, Boulevard on the East and Riverside Drive on the West.</p>
	<p>The Community Foundation for Orangeburg and Calhoun Counties is a publicly supported endowment funded by donors who believe in Orangeburg and Calhoun Counties' future.</p>

 <p>COASTAL COMMUNITY FOUNDATION OF SOUTH CAROLINA <i>Give Back. Look Forward.</i></p>	<p>CCF has more than four decades of experience working with people and organizations who want to make a lasting difference through permanent, endowed funds for philanthropic impact.</p>
 <p>U.S. CIVIL RIGHTS TRAIL</p>	<p>Partnership of historic sites throughout the United States that highlight key events surrounding the U.S. Civil Rights Movement</p>
 <p>INSTITUTE of Museum and Library SERVICES</p>	<p>The Grants to States Program is the largest grant program run by Institute of Museum and Library Services.</p> <p>“Our fundamental goal is to provide inclusive access, which meets the needs of our diverse population in South Carolina. We are committed to developing, supporting, and sustaining a thriving community of learners, who make South Carolina stronger through innovation, collaboration, and preparation.”</p>

Private National Organizations

 <p>FORD FOUNDATION</p> <hr data-bbox="159 1791 678 1795"/>	<p>Across eight decades, our mission has sought to reduce poverty and injustice, strengthen democratic values, promote international cooperation, and advance human achievement.</p>
--	--

BILL & MELINDA
GATES *foundation*

From poverty to health, to education, our areas of focus offer the opportunity to dramatically improve the quality of life for billions of people. So, we build partnerships that bring together resources, expertise, and vision—working with the best organizations around the globe to identify issues, find answers, and drive change.

THE
KRESGE
FOUNDATION

We are an institution that is deeply committed to sharing the lessons that result from our work with grantees and partners through storytelling, research and convenings.

KEY CHALLENGES

There are several key challenges related to carrying this project forward, outlined below.

INSPIRING STUDENT INVOLVEMENT

A key challenge with the development of this museum is trying to attract and retain young talent to stay in Orangeburg to work at the museum, cafe/gift shop and build start-ups in the adjacent 'makerspace'. The county's students and youth are challenged by the lack of job opportunities and opportunities for professional growth in Orangeburg. Within the context of academia, many professionally driven students leave after graduating nearby universities such as Claflin and South Carolina State. This leads to the larger issue of brain drain, whereby all the highly skilled workforce in Orangeburg goes elsewhere to explore better job opportunities. Given the right incentives, the student population could easily be motivated to engage more in community development opportunities. The success of the museum hinges on the ability to *inspire youth* to become civically and professionally engaged in Orangeburg, as well as shift their mindset about the county so that they view it as a place of opportunity where they want to live and work.

CONVINCING LARGE DONORS TO DONATE TO A PROJECT 70 MILES AWAY FROM THE IAAM

The IAAM has already received significant donations from the largest donors who invest in such African American commemorative projects in the area. A partnership with the IAMM will be essential to the Orangeburg Museum's success. The IAAM is slated to open in 2021-22, so it is raising a final round of funds before its opening. The Orangeburg Museum needs to be messaged as complementary to the IAAM, to encourage donors to invest.

CREATING A COMPELLING ARGUMENT FOR NATIONAL PHILANTHROPIC ORGANIZATIONS AND CORPORATIONS TO DONATE

Raising funds from large-scale national foundations has proven to be a challenge for reputable foundations in South Carolina. National foundations have specific requirements that one must meet to be considered, so it will require that the Orangeburg Museum's task force find creative ways to position the museum for funding. National foundations are also hesitant to invest in such rural infrastructure projects in areas that have historically been politically and racially stratified. It will require convincing the national foundations that the necessary political infrastructure is in place to see through the development and success of this project.

SECURING AN ANCHOR DONOR FOR AN ENDOWMENT FUND

The museum will need an anchor donor that provides not only a one-time donation, but a recurring donation that will sustain the museum. Once an anchor donor is identified, it will be easier to get small and national donors to provide endowments, as they will see more promise in the project.

SUMMARY OF RECOMMENDATIONS

Here we summarize our key recommendations for the implementation of the Orangeburg Museum. A project of this scale, though vitally important, will require strategic planning and thoughtful implementation. While the Orangeburg community and regional stakeholders will ultimately decide how best to proceed in establishing this site, we hope that these recommendations can provide guidance on key considerations as planning proceeds.

SECURE A LOCAL CHAMPION TO DRIVE THIS INITIATIVE

While there has been interest in establishing a commemorative site at the Triangle Bowling Alley for many years, lack of resources has stalled progress. We hope that this study helps provide a guiding vision and a starting point for community conversations. As evidenced by the overwhelming success of the EJI and the IAMM and in addition to the support by Representative Hunter and Senator Mathews, it is vitally important to identify a local community champion who is wholly invested in driving this initiative and steering it to completion. This champion will need to be a visible figure who is venerated in the community and has strong relationships with key stakeholders in both public and private sectors. (See Appendix for Key Stakeholders.) They will need to have strong leadership skills, be a talented fundraiser, and will need to have a record of success for managing large-scale initiatives. Moreover, it is important that they understand the nuances of the political landscape when working with local, state, and federal governments.

This champion would be responsible for: 1) rallying local and state-level community support; 2) collecting input for community stakeholders to guide the design of museum spaces; and 3) securing funding and corporate partnerships. While this champion can initially start on a volunteer basis, we strongly recommend that they transition to a part-time or full-time basis as funding is secured to ensure sufficient attention and energy is applied to this project.

ESTABLISH A TASK FORCE TO ENSURE COMMUNITY INPUT THROUGHOUT THE PROCESS

The local champion will also be responsible for creating a **task force** to carry the project forward, to ensure that people of diverse professional and cultural backgrounds with ties to different communities are included as development progresses. It is essential to gain public input during the design, development, and construction processes, especially when considering the outline for the exhibition space. Focus groups and community convenings should be held over the course of project's development and there should be outreach to survivors of the massacre, their descendants and those who were students in the area during the 1960s. Without all these individuals' support, this project will not be successful.

ESTABLISH PARTNERSHIPS WITH LOCAL UNIVERSITIES EARLY

Involving the two HBCUs, SC State and Claflin University, early in the process will be integral for both securing community support as well as developing meaningful interpretive and educational content. Not only were these universities the sites of the Orangeburg Massacre itself, but they have remained anchors of the Orangeburg African American community, with most citizens having some connection to one of the universities. In addition to financial support, these local universities could potentially help with critical volunteer and development support, as well as deepen ties to regional schools (see “Market Analysis”).

DEVELOP MIXED USE SPACE TO ATTRACT RESIDENTIAL MARKET AS WELL

In addition to a commemorative museum, the Triangle Bowling Alley site presents a unique opportunity to develop multi-functional spaces. The abundance of real estate allows the community to develop different businesses that help serve the local residents in addition to the tourist population and provides some year-round revenue to reduce the dependence on the seasonal tourism cycle. Years after the struggle and triumph following the Orangeburg Massacre, the city of Orangeburg remains without a functioning bowling alley. By integrating a working bowling alley into the site, the museum provides a recreation space for local residents. This is a key differentiator to nearby historic sites. We also suggest establishing an adjacent cafe/restaurant, and a small business “incubator” in the adjacent space to simultaneously bring economic growth and differentiate the museum from nearby museums.

COMMUNICATE A DISTINCT, DIFFERENTIATED POSITIONING FOR THE MUSEUM

While this site promises to be an important historical and cultural institution, it is ultimately also a business. As a business, it needs to stand out from other Black history sites and museums. The Legacy Museum’s mission is to illuminate the legacy of lynching and mass incarceration. The IAAM will point to the significant role of Charleston as a port of entry for many African Americans. With the increasing popularity of the national Civil Rights Trail, the availability of the South Carolina Green Book app, the Orangeburg Civil Rights Museum can serve as an additional draw for tourists to South Carolina and an economic driver for Orangeburg. To ensure its success, it is imperative that Orangeburg Museum develop a **unique, compelling value proposition for visitors via its messaging and mission statement.**

To that end, the community will have to decide how they want to present their unique history, and it might also want to enlist the services of a professional branding agency to help develop a communication strategy.

The Museum’s mission needs to be connected to that of nearby museums, including the Legacy Museum and the IAAM. The Orangeburg Museum can emphasize the important role of local youth activism in advancing civil rights in the United States, so that collectively these sites will describe the full history of inequalities that African Americans have faced and continue to face. (See *Messaging & Vision* above for further discussion of messaging.)

CREATE INTERACTIVE, MULTIMEDIA CONTENT

Museum audiences today expect museums to be immersive, dynamic, and interactive learning experiences rather than passive displays of artifacts. While the EJI's Legacy Museum, which partnered with Google to create content, is one of the most striking examples of this, even the modest Ellore Heritage Museum has enlisted the use of animatronics to add dynamism to the visitor experience. We strongly recommend that the Orangeburg Museum develop strategic corporate partnerships with companies such as Google to develop content to share the history of the Orangeburg Massacre through audio, visual, and interactive media.

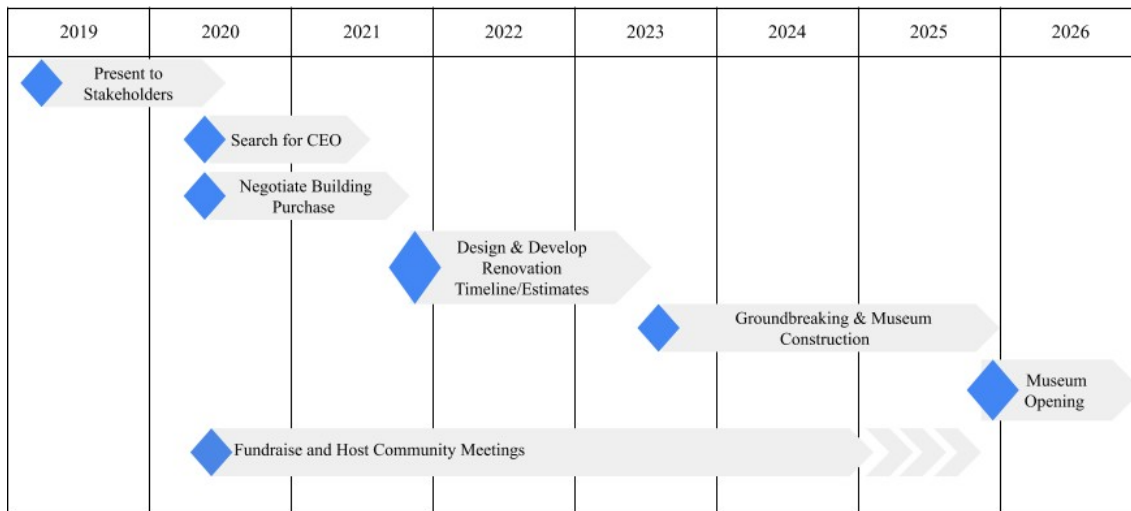
HOLD SPECIAL EVENTS & CONNECT WITH EXISTING EVENTS IN THE AREA

Hosting special events and connecting with existing traditions will help the museum strengthen its ties with the community as well as provide valuable financial support. Virtually all museums and historical sites of this size rely on special fundraising events to generate a significant portion of their revenue. Establishing a presence at existing community events, such as the Orangeburg County Fair and the Orangeburg Festival of Roses, will help increase awareness and boost attendance at the museum. Additionally, fundraising events such cookouts and oyster roasts (like those hosted by the Ellore Heritage Museum) help raise funds and bring awareness to the site. The goodwill generated from these events is vital for establishing long-term community support for the museum. (See *Capital Funding and Financial Projections* for more details.)

NEXT STEPS

There are several phases to this project to see it through completion. They are outlined below.

Next Steps - Timeline



Phase I: To initiate the next steps in this project, this feasibility study needs to be presented to Key Stakeholders. With the assistance of SCACED, it is recommended that it be presented to the Orangeburg City & County Councils, Administration of SC State and Clafin, State Senators & Representatives, and US Representatives & Senators with jurisdiction over Orangeburg, as well as the Key Stakeholders referred to in the appendix. It is important that their feedback is considered and incorporated into the planning stages after presenting the feasibility study. This study is intended to not only serve as a proposal but a starting point to engage in further conversations. The community should continue to be engaged during this phase and all phases going forward, as their input is key for the museum’s success.

Phase II: After this study is presented to all the key stakeholders the community needs to identify an individual who can champion the project locally. This person, as suggested above, should be someone who has the respect of members of the community, has a track record of successfully implementing large-scale initiatives and has strong fundraising skills. They should, in partnership with a few individuals, work on developing a coalition to raise political and financial support. They should work with the city/county who we recommend purchase the property for the museum. The project’s champion should work closely to support the city/county in the negotiations with the current owner, Ken Floyd and the real estate company representing him. The project champion should also work on negotiating the terms of the lease with the city/county for the museum site and parking lot. The individual will need to also work with the owner of the adjacent spaces to negotiate the terms of the lease for the cafe/gift shop and makerspace.

Phase III: The purchasing and negotiations related to the rent of the properties for this project should happen in tangent with a Phase I of the fundraising campaign. The champion will need to employ their coalition to work on this and create a 501c3 Foundation and hire Administrative Staff to drive pre-construction operations and fundraising.

Phase IV: Once the property is purchased and an agreement has been reached on the lease, the champion and their coalition will need to identify a design consulting firm, such as MassDesign, that can map out a vision of what the project will look like. This, along with local developers, contractors and consulting firm(s), will need to determine exact rehabilitation costs. The community's ideas for design should be incorporated into the designer's plan.

Phase V: Once the design is determined, one needs to establish building rehabilitation/restoration timelines with the contractor, developers, and consulting firms. In line with this, Phase II of fundraising needs to happen as a clearer cost estimate will be established by then. The project champion and museum CEO will need to work together to drive this fundraising piece, as a real cost estimate will be in place by then.

Phase VI: Continue to raise funds and host community meetings as well as share the project's development. Following the groundbreaking, build out an Ad campaign to build national attention around the museum. Hire a communications firm to drive content and engage national news outlets as well as tourist sites.

Phase VII: At the homestretch, host an opening party, and invite all the stakeholders, the universities, etc.

KEY REFERENCES

Art Gallery of Nova Scotia and Nova Scotia College of Art and Design University: Co-Location Facility and Feasibility Study. Lord Cultural Resources, 2018, *Art Gallery of Nova Scotia and Nova Scotia College of Art and Design University: Co-Location Facility and Feasibility Study*,

www.artgalleryofnovascotia.ca/sites/default/files/AGNS%20and%20NSCAD%20Co-Location%20Facility%20and%20Feasibility%20Study.pdf.

Bass, Jack, and Jack Nelson. *The Orangeburg Massacre*. Mercer University Press, 2002.

The Economic Impact of Travel on South Carolina Counties 2017. U.S. Travel Association, 2017, embed.widencdn.net/pdf/plus/scprt/yzihatohju/SC%20TTSA%202017%20Report%20Final.pdf?u=kceaj9.

Hudson, Simon, et al. *Increasing African American Tourism in South Carolina*. 2016, *Increasing African American Tourism in South Carolina*, jc-associates.com/wp-content/uploads/2016/11/African_American_tourism_report_allPages-2.pdf.

Williams, Cecil J. *Out-of-the-Box in Dixie: Cecil Williams' Photography of the South Carolina Events That Changed America*. Cecil J. Williams Photography/Publishing, 2010.

Windsor Museum: Museum Feasibility Development Study. Lord Cultural Resources, 2012, *Windsor Museum: Museum Feasibility Development Study*, www.citywindsor.ca/residents/culture/documents/final%20museum%20feasibility%20study%20by%20lord%20cultural%20resources.pdf.

APPENDICES

APPENDIX – A – Stakeholders and Interviewees

STAKEHOLDERS

1. **Honorable Jim Clyburn**- Third-ranking Democrat (Majority Whip); passionate about historic preservation and restoration programs; his efforts have restored historic buildings and sites on HBCUs. His legislation created the SC National Heritage Corridor.
2. **Rep. Gilda Cobb-Hunter** - District 6 - Orangeburg (D) (Ways and Means Committee)
3. **Sen. John Matthews, Jr.** - District 39 - Berkeley, Calhoun, Colleton, Dorchester & Orangeburg Counties (D) (Education and Finance Committees)
4. **Harold M. Young, Administrator, County of Orangeburg**
5. **Jannie Harriot** – SC African American Heritage Commission & Foundation
6. **Cleveland Sellers** - Civil rights activist, was convicted of inciting a riot during the Orangeburg massacre, father of Bakari Sellers, a local politician.
7. **Dr. Henry N. Tisdale** - Retiring in June 2019, President of Claflin University (served since 1994). Member of the Board of Directors of Orangeburg County Development Commission. He was a student during the Orangeburg Massacre.
8. **Reggie Burgess** - Police Chief of North Charleston, would be a good ally. (New role was announced in January 2018 after the former Chief Driggers stepped down. Chief Burgess is working on making the federal audit of NCPD policies and standards through the US Justice Department public following the fatal shooting of Walter Scott.)
9. **Orangeburg County Historical Society**
10. **Darla Moore** - Philanthropist
11. **Sky Foster** - Department Manager for Corporate Co.
12. **Herb Johnson** - Chief Diversity & Inclusion Officer - Michelin North America
13. **Edie Blakeslee** - VP of Grantmaking & Community Leadership, Coastal Community Foundation
14. **Max Metcalf** - BMW Head of Corporate Giving SC, Treasurer for South Carolina Charities, Inc. (SCCI), the charity arm of the BMW Pro-Am Golf Tournament

Stakeholders (INTERVIEWEES for this Study)

1. **Darrin Goss, Sr.**, President & CEO, & Edie Blakeslee, Vice President of Grantmaking & Community Leadership, Coastal Community Foundation of SC (CCF)
2. **Honorable Michael C. Butler**, Mayor of Orangeburg
3. **Duane Parrish**, Director, SC Department of Parks, Recreation & Tourism
4. **Daron-Lee Calhoun**, Coordinator, Avery Institute of Afro-American History
5. **Chuma Nwokike**, Owner, Gallery Chuma
6. **Michael Moore**, Pres. & CEO, International African American Museum
7. **Adolphus Johnson**, Pres. & CEO, New America Corp
8. **Willie B. Owens**, Councilmember D7
9. **Dr. Barbara Adams, Dean**, SC State Business School
10. **Rachelle Holmes**, Local Business Owner, Orangeburg
11. **Zach Middleton**, Descendent of Delano Middleton
12. **Cecil Williams**, Civil Rights Photographer
13. **Dr. Kevin So**, Ph.D., Assistant Professor, University of South Carolina
14. **Dr. Bobby J. Donaldson**, Director & Associate Professor of History, University of South Carolina's Center for Civil Rights History & Research
15. **Mary Shriner**, Executive Director of the Santee Cooper Promotion Commission
16. **Dawn Dawson-House**, Director of Corporate Communications, South Carolina Department of Parks Recreation and Tourism
17. **Dudley Jackson**, Research Director, South Carolina Department of Parks Recreation and Tourism
18. **Nicholas Merkelson**, Consultant, Lord Cultural Resources
19. **Candice Roberson**, Executive Director, Downtown Orangeburg Redevelopment Authority

Appendix B – Projected Museum Attendance

DOMESTIC AND INTERNATIONAL TRAVELERS

We used a top-down approach to forecast attendance, using statewide tourism data provided by the South Carolina Parks, Recreation, and Tourism department (SCPRT). The procedure we used was as follows:

1. For each group, we identified the total number of visitors to the state in 2017, based on data provided by SCPRT^{78,79,80,81}.
2. We then computed how many travelers were staying overnight and assumed those variables to be independent. We multiplied the total number of visitors by the historical fraction of each type.
3. We then tried to estimate the fraction of travelers interested in museums. In the SCPRT reports, many times the participation rate of museum-going was aggregated with other activities. In these cases, we tried to estimate a reasonable participation rate for the museums alone.
4. Finally, across all segments, we assumed that the Orangeburg Museum would be able to capture 2% of the museum attendance market. We justified this number by observing that there are about 200 museums in South Carolina.⁸² If each got an equal share of the market, they would have 0.5% of travelers. However, many of these museums are small and hard to access. Therefore, we thought that with its proximity to Charleston and Columbia, and its promotion as part of the civil rights trail, Orangeburg could easily achieve a 2% market share.

Table 2 Example Participation Rates for "Out of State Leisure Travelers" for various activities

Activity	Participation
Urban sightseeing, Historic sites/Churches	13%
Rural sightseeing	10%
Visiting relatives	9%
Zoos/Aquariums/Aviaries	8%
Visiting friends	7%
Old homes/mansions, Museum, Theme park/Amusement park/Water park	6%
Wildlife viewing, Wine tasting/winery tour, Gardens	5%

The following table breaks down the expected attendance for all tourist segments, followed by notes about specific assumptions.

⁷⁸ "In-State Leisure Travel in South Carolina" SCRPT, <https://embed.widencdn.net/pdf/plus/scprt/wgsg2you1b/REPORT%20IS.pdf?u=kceaj9>

⁷⁹ "Total Domestic Travel to South Carolina" SCRPT, <https://embed.widencdn.net/pdf/plus/scprt/vgi58yjh0s/REPORT%20TOTAL.pdf?u=kceaj9>

⁸⁰ "Domestic Travel in South Carolina to Visit Friends and Relatives" SCRPT, <https://embed.widencdn.net/pdf/plus/scprt/vgi58yjh0s/REPORT%20TOTAL.pdf?u=kceaj9>

⁸¹ "International Visitation to South Carolina" SCRPT, <https://embed.widencdn.net/pdf/plus/scprt/txfukqbk19/International%20Visitation%20to%20South%20Carolina%202015%20-v2.pdf?u=kceaj9>

⁸² "South Carolina." *Wikipedia*, Wikimedia Foundation, 13 May 2019, en.wikipedia.org/wiki/South_Carolina.

Table 3: Breakdown of Domestic and International Tourism

	Domestic In State Leisure		Domestic Out-of State Leisure		Domestic Out-of State VFR		International (Canada)		International (Europe)	
	% of Travelers	# of Travelers	% of Travelers	# of Travelers	% of Travelers	# of Travelers	% of Travelers	# of Travelers	% of Travelers	# of Travelers
Total Travelers	-	3,200,000	-	10,300,000	-	11,700,000	-	614,000	-	99,000
Driving %	95%	3,040,000	85%	8,755,000	86%	10,062,000	77%	472,780	77%	76,230
Overnight %	100%	3,040,000	84%	7,354,200	77%	7,747,740	80%	378,224	80%	60,984
Museum + Other Attractions	7%	-	6%	-	8.000%	-	-	-	-	-
Participate in Museum	2%	53,200	1.000%	73,542	8.000%	619,819	15%	56,733.60	20%	12,196.80
Orangeburg Market Share	2%	1,064	2%	1,471	2%	12,396	2%	1,135	2%	244
Annual Domestic Visitors	0.033%	1,064	0.014%	1,471	0.106%	12,396	1.23%	1,135	1.23%	244

In State Leisure Travelers

For in-state leisure travelers, the participation rates for museums were lumped in with other attractions such as waterparks, and zoos. Given the popularity of the Riverbanks Zoo, we estimated museum interest to be about *one quarter* of overall museum + zoo + waterpark interest

Out of State Leisure Travelers

For in-state leisure travelers, the participation rates for museums were lumped in with other attractions such old houses and mansions. There are many old houses that are easily accessible from tourist hubs like Charleston that draw major crowds, so we estimated museum interest to be about *one sixth* of overall mansion + museum interest.

International Travelers

SCPRT did not provide activity participation rates for international visitors, so we estimated them based on domestic participation rates, which average around 7%. Given that international tourists typically stay longer and drive to multiple locations, we assumed their interest would be *about double* that of domestic tourists, with Europeans having slightly higher interest in museums. Therefore, we estimated that *15% of Canadians* and *20% of Europeans* would participate in museum related activities. Even with these estimates however, the overall volume of international visitors to Orangeburg is still low.

K-12 ATTENDANCE

To estimate how many K-12 students will attend this museum, we looked at two groups of schools:

- Schools within 50 miles of the City of Orangeburg, considered **Regional** Schools
- Schools in the Charleston Metropolitan Area (5-mile radius), labeled **Charleston** Schools

Charleston is about 90 minutes from Orangeburg, which makes it farther away than the recommended one-hour radius for field trips. However, given the cultural importance of the Orangeburg site and the density of schools in Charleston, we believe with a concerted marketing effort, the Orangeburg Museum will be able recruit school groups from Charleston as well as from surrounding rural districts.

Table 4: Attendance Estimates for Surrounding K-12 Schools

% Visiting Schools	10%
Number of visitors per School	17%

	Total Students	Students from Participating Schools	Potential Visitors
Regional Public Schools	180,651	18,065	3,011
Regional Private Schools	9,891	989	165
Charleston Public Schools	36,817	3,681	614
Charleston Private Schools	3,440	344	57
Total	230,799	23,080	3,847

We collected attendance numbers from National Center for Educational Statistics⁸³. For the purpose of this analysis, we conservatively assume that the museum can secure visits from 10% of this school population each year. For each school that does attend, we assume that, out of a K-12 school, two full grade levels will attend – one elementary school class and one high school class. This leads to a $2/12 = 17\%$ yield per school. Overall, this means that the Orangeburg museum will get visits from 1.7% of the surrounding school K-12 students per year. Table 4 shows a breakdown of projected visitors by type of school.

⁸³“National Center for Education Statistics (NCES) Home Page, Part of the U.S. Department of Education.” *National Center for Education Statistics (NCES) Home Page, a Part of the U.S. Department of Education, nces.ed.gov/*.

Appendix C- Estimated Initial Capital Investment

Compiled below are our Estimates for the Initial Capital Investment necessary to break ground on the museum project. The figures were calculated, based on review of comparable projects, to provide a high-level estimate of costs that the team deemed to be essential. This is not an exhaustive list of costs, but the capital amount calculated should serve as a reasonable guide for the city of Orangeburg and the Museum committee. The supplementary files used to create this schedule will be provided to SCACED and can be distributed to other interested stakeholders upon request.

Table 5: Estimated Capital Budget

Initial Capital Investment

Building (Bowling Alley)	\$	550,000
Construction/Architecture Consultants	\$	500,000
General Contractor	\$	800,000
Renovations (Bowling alley, Maker space, Café, Building structure renovations, Parking lot)	\$	4,500,000
Museum Consultants	\$	100,000
Initial Marketing Campaign	\$	35,000
Video Production for Exhibits	\$	20,000
Exhibit Material Acquisition Costs	\$	100,000
Food & Beverage Licensing fees	\$	10,000
Curator - Temporary/Consulting	\$	25,000
Lobbying/Fundraising Costs	\$	300,000
Initial Museum Endowment	\$	3,000,000
Capital Necessary To Fund Project	\$	<u>9,940,000</u>
Penny Sales Tax Revenue to Date	\$	1,000,000
Additional Capital Necessary to Break Ground	\$	8,940,000

Appendix D- Financial Projections: Years 1-10

The financial projects were made not only using comparables from the Penn Center, Drayton House, SC Cotton Museum and Elloree Heritage Museum, but also hypothetical pricing data for various activities that would occur on the Museum’s campus. We feel that donations will hit a high in year one as many people will make first-time donations based on local and national press coverage of the Museum’s opening, and then donations will level off in year two before growing per annum. We assumed a 5% CAGR (continued annual growth rate) for all of the numbers seen below with the exception of the donations and the numbers tied to attendance (i.e. ticket sales, bowling alley sales) because we expect attendance to increase by a factor of two in the second year before leveling off and growing at the aforementioned CAGR.

Supplementary information utilized to create the financial projections will be supplied to SCACED and can be made available upon request.

Table 6 Estimated Operating Revenues and Expenses

Revenues	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Donations & Grants	\$ 500,000	\$ 150,000	\$ 157,500	\$ 165,375	\$ 173,644	\$ 182,326	\$ 191,442	\$ 201,014	\$ 211,065	\$ 221,618
Investment Income	\$ 120,000	\$ 126,000	\$ 132,300	\$ 138,915	\$ 145,861	\$ 153,154	\$ 160,811	\$ 168,852	\$ 177,295	\$ 186,159
Ticket Sales	\$ 57,882	\$ 115,764	\$ 121,552	\$ 127,629	\$ 134,011	\$ 140,712	\$ 147,747	\$ 155,134	\$ 162,891	\$ 171,036
Bowling Alley Sales	\$ 39,208	\$ 78,416	\$ 82,337	\$ 86,454	\$ 90,776	\$ 95,315	\$ 100,081	\$ 105,085	\$ 110,339	\$ 115,856
Event Space Rental Income	\$ 15,000	\$ 15,750	\$ 16,538	\$ 17,364	\$ 18,233	\$ 19,144	\$ 20,101	\$ 21,107	\$ 22,162	\$ 23,270
Gift Shop Revenues	\$ 37,898	\$ 75,797	\$ 79,587	\$ 83,566	\$ 87,744	\$ 92,131	\$ 96,738	\$ 101,575	\$ 106,654	\$ 111,986
Food & Beverage Income	\$ 45,478	\$ 90,956	\$ 95,504	\$ 100,279	\$ 105,293	\$ 110,558	\$ 116,086	\$ 121,890	\$ 127,984	\$ 134,384
Revenues Total	\$ 815,466	\$ 652,683	\$ 685,317	\$ 719,583	\$ 755,562	\$ 793,340	\$ 833,007	\$ 874,657	\$ 918,390	\$ 964,310
Expenses										
Salaries	\$ 310,000	\$ 325,500	\$ 341,775	\$ 358,864	\$ 376,807	\$ 395,647	\$ 415,430	\$ 436,201	\$ 458,011	\$ 480,912
Rent & Utilities	\$ 65,000	\$ 68,250	\$ 71,663	\$ 75,246	\$ 79,008	\$ 82,958	\$ 87,106	\$ 91,462	\$ 96,035	\$ 100,836
Fundraising Expenses	\$ 31,000	\$ 32,550	\$ 34,178	\$ 35,886	\$ 37,681	\$ 39,565	\$ 41,543	\$ 43,620	\$ 45,801	\$ 48,091
Food & Beverage Expenses	\$ 30,016	\$ 60,031	\$ 63,033	\$ 66,184	\$ 69,493	\$ 72,968	\$ 76,617	\$ 80,447	\$ 84,470	\$ 88,693
Maintenance	\$ 20,000	\$ 21,000	\$ 22,050	\$ 23,153	\$ 24,310	\$ 25,526	\$ 26,802	\$ 28,142	\$ 29,549	\$ 31,027
Program Expenses	\$ 50,000	\$ 52,500	\$ 55,125	\$ 57,881	\$ 60,775	\$ 63,814	\$ 67,005	\$ 70,355	\$ 73,873	\$ 77,566
Other Expenses (Insurance, etc)	\$ 35,000	\$ 36,750	\$ 38,588	\$ 40,517	\$ 42,543	\$ 44,670	\$ 46,903	\$ 49,249	\$ 51,711	\$ 54,296
Marketing Expenses	\$ 40,773	\$ 32,634	\$ 34,266	\$ 35,979	\$ 37,778	\$ 39,667	\$ 41,650	\$ 43,733	\$ 45,920	\$ 48,215
Expenses Total	\$ 581,789	\$ 629,215	\$ 660,676	\$ 693,710	\$ 728,395	\$ 764,815	\$ 803,056	\$ 843,209	\$ 885,369	\$ 929,637
Operating "Profit"	\$ 233,678	\$ 23,468	\$ 24,641	\$ 25,873	\$ 27,167	\$ 28,525	\$ 29,951	\$ 31,449	\$ 33,021	\$ 34,672
Net Worth	\$ 233,678	\$ 257,145	\$ 281,786	\$ 307,659	\$ 334,826	\$ 363,350	\$ 393,302	\$ 424,750	\$ 457,772	\$ 492,444

Appendix D- Financial Projections: Years 1-10 Continued

MUSEUM ACTIVITY ASSUMPTIONS

Table 7: Estimated Revenues Across Different Sources

Adult Ticket Price	\$	8.00
Kids Ticket Price	\$	3.00
Senior Ticket Price	\$	5.00
Student Attendance	\$	4.00
Bowling Price Adult/Seniors	\$	10.00
Bowling Price Kids	\$	5.00
Shoe Rental	\$	2.00
Average Amt Spent at Café pp	\$	15.00
Percentage of people who will bowl		40%
Percentage of people who will buy merchandise		30%
Average amount spent on merchandise/gifts pp	\$	12.50
Percentage Kids		33%
Percentage Adults		67%
Percentage of Adults as Seniors		10%
Percentage of people who will buy food		30%
Percentage cost of food		33%
Student Attendance		3,847
Adult Attendance		9,819
Senior Attendance		1,091
Children Attendance		5,455
Total Attendance		20,212
Attendance tab		20,212
Difference		-
Initial Endowment	\$	3,000,000.00
Interest Rate		4%

Table 8: Estimated Employment Expenses

	Salaries	Quantity of Staff	Average Hours Worked Per Week	Weeks Worked Per Year	Wage
CEO	\$ 75,000				
Administrative staff	\$ 120,000	3			\$40,000
Curator	\$ 40,000				
Hourly Employees	\$ 75,000	15	25	20	\$ 10.00
Fundraising Expenses	\$ 31,000.00				
Rent	\$ 50,000.00				
Utilities	\$ 15,000.00				
Food Expenses	\$ 30,015.54				
Maintenance	\$ 25,000.00				
Program Expenses	\$ 50,000.00				
Other Expenses	\$ 35,000.00				