



INTERNATIONAL AFRICAN AMERICAN MUSEUM
Charleston, South Carolina

STRATEGIC PLANNING REPORT

AMERICAN HISTORY WORKSHOP

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Part I: Introductory

THE TASK OF THE STRATEGIC PLANNING REPORT is to envision and lay out practical directions for the creation of a popular, engaging, inspiring, and sustainable institution that fulfills the purposes described below.

CORE VALUES OF THE IAAM

- Giving precedence to the voices and perspectives of African Americans
- Adhering to authenticity and truthfulness in the presentation of history and contemporary cultures
- Strengthening efforts to preserve the sites, artifacts, documents, and contemporary cultural practices that connect modern-day people to that history
- Encouraging community participation in planning, building, and operating the museum
- Building international and regional partnerships and collaborations with like-minded individuals, groups, and institutions
- Making the museum accessible — physically, economically, intellectually — to its diverse publics, both on-site in Charleston and globally
- Respecting the visiting public's intelligence, time, curiosity, and comfort

PURPOSES OF THE IAAM

1. To create an informal educational institution where residents and visitors alike can learn about the history of how Africans and their descendants were swept up in the age of exploration, and helped shape — even through the experience of enslavement — successive eras of economic, political, and cultural development across the globe, as seen through the lens of South Carolina.

This exploration emphasizes:

- the significance of Charleston as a major port of arrival for Africans in America
- continuing evidences of African influences in the contemporary landscape of South Carolina

- the ongoing global and local struggle for human dignity
2. To build a community based on shared interests and values by providing a gathering place and an educational resource to:
 - celebrate identity and achievement
 - bridge cultural differences and combat racism
 - strengthen commitments to social justice
 3. To establish links between the museum and other historical sites and cultural attractions in the nation, region, and around the world by:
 - orienting museum visitors to resources beyond the museum walls
 - cooperating in the development of shared programming, training, and use of collections and other assets
 4. To inspire learning and contributions to knowledge by:
 - engaging learners in the study of their past, present, and future
 - promoting the value of education and mentoring
 - cooperating with schools, historic sites, and other institutions in and beyond Charleston to facilitate research, instruction, and artistic expression
 5. To advance regional economic development by:
 - strengthening South Carolina's visitor economy, with particular reference to African American enterprises
 - encouraging visitation to African American historic sites and other regional visitor attractions
 - fostering cultural and commercial links to Africa and places of the African Diaspora
 - collaborating with other regional, national, and international cultural and historical institutions to train professional staff
 - developing skills for work, schooling, and civic participation among young people

KEY PROJECTED IAAM VISITOR SEGMENTS

As the museum's development proceeds beyond this phase, its purposes and programs will need to be continually tested against the characteristics of key segments of its audience. A later chapter of this report will estimate the potential size of these segments.

In general, the core audiences for IAAM will be (1) local residents, both African American and non-African American, who are eager to connect their own family and personal narratives to a larger regional/global history; (2) out-of-town tourists who wish to view Charleston's historical resources from a fresh and largely unfamiliar perspective.

1. Walk-up visitors

Because Charleston is already a strong tourist destination, a large portion of the visiting public is expected to be **out-of-town tourists**, whom we define as those spending a night in the area or who live beyond the Charleston television market. The new museum should help expand the African American tourist market in Charleston. Many African Americans could trace their first American ancestors to an arrival in Charleston, and many of the most important issues in African American history are rooted here. But since more than 95% of the current tourist audience is non-African American, it is critical to the institution's success that they be attracted as well. For such visitors, IAAM may not be the prime destination, but it should fit comfortably into their schedule of visiting other attractions, and particularly those surrounding Liberty Square — the South Carolina Aquarium and the interpretive center and tour boat facility for Fort Sumter National Monument. In programmatic terms, the museum will always emphasize that it is telling a story vital to every American's experience – how this nation's economy, ecology, politics, culture, and social relationships have been shaped.

For **local residents**, of course, the first visit is similar to that of tourists from afar, but residents should adopt a sense of authorship and possessiveness about IAAM as they return again and again. They will come back to bring out-of-town guests and should be recognized as Charlestonians and South Carolinians by the museum in the admissions and ticketing process. The family memory wall and other programs will depend heavily upon the participation and contributions of local residents' historical stories, artifacts, and wisdom. Residents need to see their own families' patterns of life reflected in the museum's presentations and programs. They need, as well, to understand the museum's contribution to the educational and social development of the region's youth, elderly, and at-risk populations. Non-African American residents of the Charleston metro area will learn to see their homes and landscapes in a whole new light. Of course, there are challenges in that – given the region's history of cultural divisiveness – but we predict that many old and new white South Carolinians will welcome a fresh perspective on their local history.

2. Organized groups

IAAM's Learning Center will be a key resource for welcoming pre-arranged regional **school and youth groups**. The museum will design each of its exhibits to work successfully with families that include children and with group visitors as well. A key audience is adolescents at risk of truancy and behavioral problems. Recent experience with the "*Slavery in New York*" exhibition at the New-York Historical Society showed

enormous effectiveness with many special groups, including rehabilitation and offenders programs.

Bus tours are often the conduit by which older visitors come to sites like IAAM. In general, these tours operate on a tight schedule, which means that a fixed program of theatrical presentations, short exhibit tours, and an opportunity to shop should be organized and offered efficiently to tour operators.

IAAM, on the other hand, will have a special attractiveness for **family reunions, church, academic, and social group gatherings**, and other programs related to African American history and culture. For such organizations and groups, the visit may include opportunities for oral history interviewing, special live performances and demonstrations, and links to guided tours of the city and other cultural organizations.

3. Events and Programs

Special events and programs are avenues for IAAM to focus attention on the limitless opportunities to understand the impact of Africans in South Carolina as they influenced the world.

Beyond its “museum” visit profile, IAAM will sponsor and host many events and programs of interest to its core audiences. **Evening and weekend lectures, film series, and workshops** will contribute to the regional public’s familiarity with the institution and establish its importance for many who are not conventional museumgoers.

Local families should come to rely upon IAAM as a source of child-friendly positive programming. This will doubtless encourage public and private philanthropic support. These opportunities may appeal to the tourist market as well, if well advertised on the IAAM and Charleston tourism websites.

Teenagers represent, perhaps, the most challenging audience for museums, and one of the most important. Young people need to see IAAM as a vehicle for personal growth and positive group interaction. Opportunities to offer responsibilities and mentoring to local teens are desperately needed and can be a key feature of this institution.

Business, religious, cultural, civic and educational organizations will be interested in using IAAM’s theater, meeting rooms, and educational facilities, and roof garden for **public and private events** both related and unrelated to IAAM’s mission.

Part II, Chapter 1: The Interpretive Program

INTRODUCTION

Fig. 1 represents the configuration of the program elements that constitute the public spaces, installations, and activities of IAAM. This is a conceptual, not architectural, diagram.

THE GATHERING is the spine of the museum, connecting the busy streetscape of Charleston to the museum, welcoming visitors warmly to an exploration of their own family's and people's history, and leading to a contemplative roof garden wherein they can reflect on the meanings of the stories that have been explored in the museum. **THE GATHERING** is based on the observation that the most successful museum visits combine intense thematic explorations with opportunities for refreshment (rest, informal conversation, and food and drink) and reflection, roughly in alternating 45-minute segments. **THE GATHERING** is infused with art installations that employ many non-verbal cultural elements, communicating non-didactically with visitors. Images and welcome messages merge the familiar and the unfamiliar, employing African, Gullah, Creole, European, English, and American expressions and visualizations interchangeably. Drumming and traditional music are heard throughout the space. The Gathering also honors those who have contributed vision, hard work, and necessary funds to the accomplishments of the IAAM.

At the heart of the program are the **CORE EXHIBIT GALLERIES**. They are divisible into three areas, "Africans Shape the Rural Lowcountry," "African Cities on the Carolina Coast," and "Defining Freedom by Their Actions." These galleries engagingly re-tell South Carolina's history from a new perspective, informed by a generation of innovative interdisciplinary research and an enhanced respect for the cultural resources and traditions of local African American people. For many visitors, these exhibits make familiar facts — what they have always seen in the landscape, cityscape, and political climate of the state — newly comprehensible. Correspondingly, their creative teaching methods make new historical perspectives convincing, rooting them in experiences that every visitor can understand.

In addition, **CHANGING EXHIBIT GALLERIES** accommodate exhibits produced by IAAM, often in collaboration with sister institutions locally, regionally, and internationally, or borrowed from other institutions. IAAM's **THEATER** presents one or more film programs specially developed for the museum, and also welcomes films, performances, concerts, and other events produced by the museum or by others.

The **LEARNING CENTER** comprises IAAM's role as a resource for community groups, family reunions, teachers, scholars, professionals, artists, and young people. It includes opportunities for oral history projects, lectures, discussions, workshops, hands-on learning, curriculum development, arts projects, and other ongoing educational programs.

Beyond the museum walls, IAAM helps foster a **LEGACY FUND**, which enlists many cultural organizations in collaborating to strengthen research, collections, and public learning about African American history and culture in South Carolina and internationally.

Each of these program elements will be described in the pages to follow.

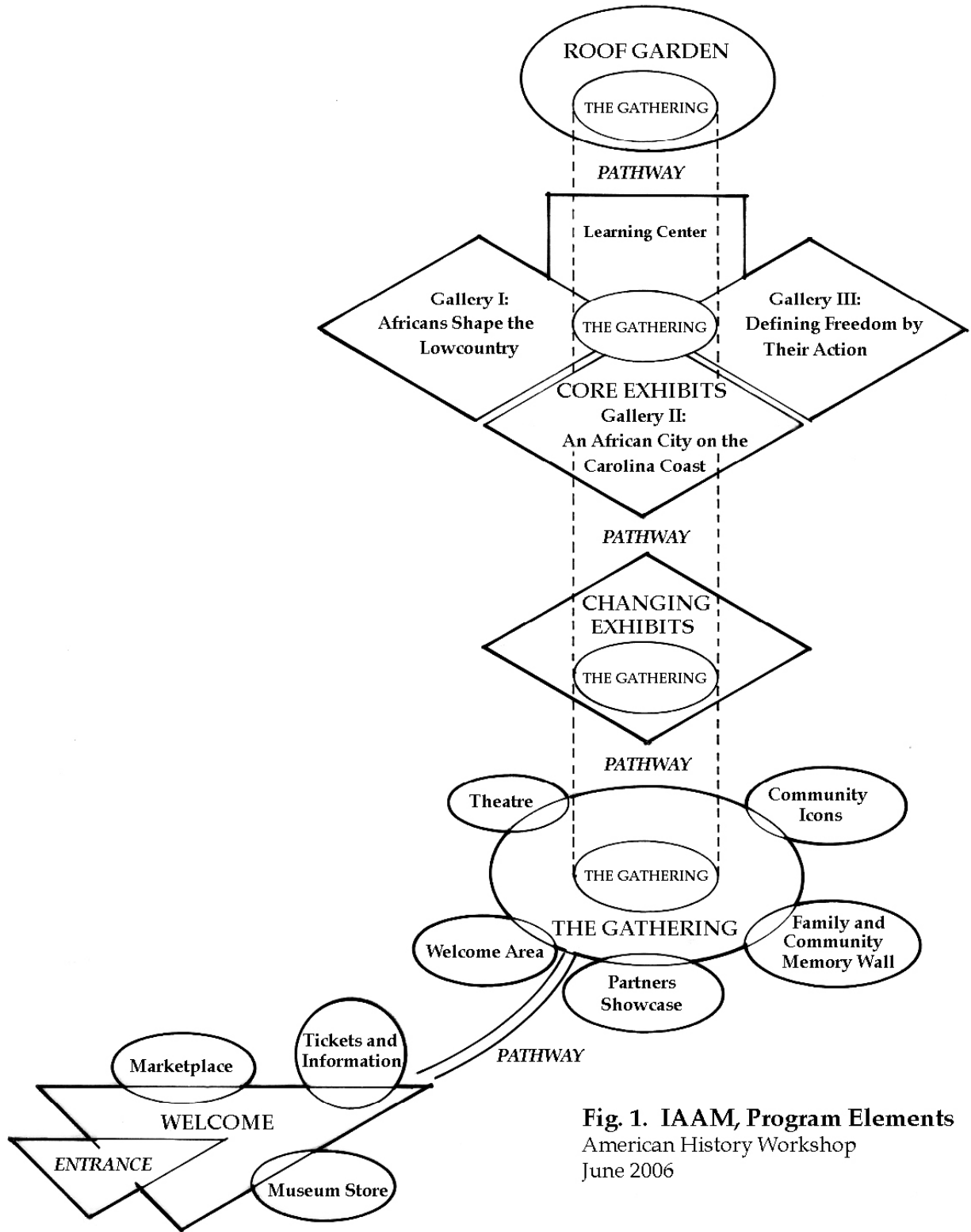


Fig. 1. IAAM, Program Elements
American History Workshop
June 2006

Part II, Chapter 2: IAAM's Core Exhibits

Goal of the Core Exhibit Program

The three exhibit galleries aim to convey the basic historical thrust summarized in the **THEMATIC OVERVIEW**, included as Working Paper I to this report. That paper provides the scholarly as well as the philosophical basis for the museum's interpretive direction. Some readers of this report in draft have noted that the Thematic Overview helped in understanding the planning material in the pages that follow.

The core exhibits equip visitors with new ways of seeing the past and encourage a commitment to further exploration. A museum visit, it should be emphasized, is better at introductions than conclusions. It is more effective at sparking long-term interest rather than providing encyclopedic knowledge of its subject.

Developing an Interpretive Direction

How can the rich themes of the history IAAM wants to communicate be transformed into successful public learning experiences within the context of the museum gallery?

Among African American museums in the United States, IAAM's unique advantage is that it is part of a rural and urban, physical and cultural, landscape that still has powerful connections to the legacy of Africa. (The New Orleans area has a similar connectedness but no museum dedicated exclusively to its exploration.) There are tour programs, museum exhibits, plantation museums, historic sites, historic markers, and educational projects that help make those connections clear. But no single site or program brings the continuing African presence together as a story and demonstrates its enormous historical importance.

"In human terms," the geographer D.W. Meinig has written, "Charles Town might best be described as the capital of an African foothold with a diverse minority of Europeans all under the shaping influence of English West Indian experience, forcibly wedged into American Indian realms."¹

There are many qualities in the history and contemporary life of this region that can traced to the thought, work, and memory of the diverse African peoples who have lived here. So we have adopted as a core challenge of the museum to assist residents and

¹ D.W. Meinig, *The Shaping of America: A Geographical Perspective on 500 Years of History, Vol. I: Atlantic America, 1492-1800* (New Haven: Yale University Press, 1986), 190.

visitors in discerning and respecting this aspect of our shared history. For African American people, this is an overdue recognition of the cultural richness of their ancestors and its power to inform lives today. But for all who come, it is an essential, unmistakable aspect of history and a vital contribution to the identity of all South Carolinians and all Americans.

To focus on the African aspects of this history means:

- (1) re-examining every historical event, every document, every artifact, every aspect of the historical landscape, and every surviving cultural practice for evidence of the activity of Africans;
- (2) reframing every chapter of every story to discover the subjective agency of Africans and African Americans — what they did rather than what happened to them;
- (3) researching the lives of particular African and African American persons and presenting them as lenses through which to see the humanness of this history.

Slavery, of course, was a system of labor, of law, of economics, of local and national and international politics, of interpersonal relationships, and of the organization of everyday life. A generation of scholars has excavated an enormous amount of information about the history of slavery. Virtually all of the “hard evidence” available to scholars has come from the hands and bears the perspectives of the slave-holding authorities. Few historical documents — personal or official documents or even artifacts of everyday life — descend to us directly from the hands of Africans. And yet scholars have learned and our public can learn to “read between the lines” historically. We can ask of each event: What did the African do here? What did he or she think and feel? How did the African prepare for this moment, and how did he or she recall it later? How did what occurred help shape an African way of life in South Carolina?

In this process, we may also turn to other forms of evidence less exclusively controlled by Europeans and European Americans – surviving artifacts, oral histories, community traditions, and folkloric materials.

What is true of slavery is equally applicable to other chapters of the history of African peoples in Africa and America. When we say that we want to tell the “untold story” of Africans in South Carolina, it is seldom that we are uncovering entirely new facts – but rather that we are restoring the African side of a conversation, the role of black people in a transaction, a negotiation, or a relationship that has almost always been told only from one side.

There is, then, an African chronology that goes alongside the more conventional European American chronology most students learn in school.

This is an exciting intellectual and creative challenge. IAAM's board, staff, consultants – and ultimately its visitors and students – should be invited to share this excitement. Every strong institution is animated by a powerful question. IAAM builds a community of

discovery around the challenge of listening in on the African voice in long-muted dialogues, finding the African handprints on long-obscured physical survivals, and reconstructing the African role in the key decisions of South Carolina's history.

The Regional and Historical Focus of the Museum's Interpretation

The planning team has proposed three different settings for IAAM's core exhibits. Visitors may visit them in any sequence.

Gallery I, "Africans Shape the Rural Lowcountry," concentrates on the evolution of African American life in rural and coastal South Carolina from the late 1600s – when the rice cultivation and the importation of slaves begins – up through the years before the Civil War. The gallery stresses the ecological context (hence the use of the term "Rural Lowcountry" rather than "Gullah-Geechee" or "South Carolina"²) in which black South Carolinians fashioned a complex civilization out of the diverse strands of Africa they brought with them. Gallery II, "Tales of African Cities," surveys the same historical period and addresses the physical, cultural, and sensory environment of Charleston and other cities. Gallery III, "Defining Freedom by Their Action," widens the scope out to the whole state as it explores the struggle against inequality in the post-Civil War years.

Focusing on the Stories of Individuals and Individual Families

The most successful exhibits in history museums focus on the lives of individuals in the past. Museum visitors will feel more emotionally connected to the drama of past human lives than to great historical themes. A human life is, of course, more than an illustration of a historical theme. Each person's life is larger and more complex than the ideas that historians can discover in it. To achieve an emotional connection with visitors, we have to move from the experience of many to the experience of a few, or one, which can be portrayed concretely. So while we assign themes to particular galleries or installations, we always intend to make them more immediate by linking them to real lives and real objects.

At this stage of institutional planning, however, it is not necessary or possible to select individual incidents, particular people, or specific places. That work comes during exhibit planning and development, when teams of scholars, exhibit developers, and design professionals lay out the storylines and choose the interpretive strategies for each gallery.

² Historians generally use the term Lowcountry to refer to the coastal plains of the Carolinas and Georgia, including the islands. This is regarded as one of the three major zones of plantation agriculture in North America that employed slave labor, along with the Chesapeake and the lower Mississippi valley. See Ira Berlin, *Many Thousands Gone: The First Two Centuries of Slavery in North America* (Cambridge: Harvard University Press, 1998).

How Exhibits Communicate: From Themes to Engaging Experiences

Visiting history exhibits works quite differently from reading history books or attending history classes in school or college. Museum tours are almost always social occasions. Visitors encounter historical ideas in the company of companions and of strangers, and so parents, for example, frequently have to shift roles from learner to co-teacher and back again. Visits are also physically complicated experiences. Compared to reading, listening to lectures, or watching films, exhibits may call upon many more senses – sight, sound, touch, smell, taste, as well as the human senses of proximity, light and dark, the duration of time, and the feedback of one's own body – and engage many more skills – literacy, numerical calculation, puzzle-solving, role-playing and emotional empathy, aesthetic awareness, mechanical ability, musical talent, physical strength, and so on.

In short, successful exhibits are composed of ideas captured and presented in experiential frameworks. Depending on the exhibit developer's and designer's choice and skill, an idea can be made painful or comfortable, challenging or obvious, provocative or tedious.

Museums also have limitations. The diversity of their audiences makes it difficult to assume a common ground of learning skills, interests, and previous knowledge. Any single visit is generally too brief for visitors to achieve true command of complex concepts. Some subjects are too abstract for successful treatment in the physical landscape of the museum gallery. It's easy to flip back a few pages, while reading, to refresh one's understanding of an idea presented earlier. Museum visitors are usually reluctant to go backward in a gallery – often against the tide of traffic and the weariness of “museum feet.”

The successful history exhibit is actually a succession of discrete four- or five-minute physical, social, intellectual, and emotional experiences. Generally, visitors are better at puzzling out these relatively brief clusters of information and sensations than at keeping a focus on larger themes for an hour at a time. These clusters should serve as building blocks toward an understanding of IAAM's larger ideas and purposes.

Each cluster may combine original objects, images, and documents, interpretive texts and labels, as well as graphic panels, 3-D models, and audio-visual programs as aids to understanding. They may also include live interpreters and museum teachers; live and recorded musical, dramatic, and story-telling performances; demonstrations of crafts and arts; interactive learning programs, including those that use computers and others that use hands-on and simulation exercises.

Redundancy is important. The same information may be provided in different media to appeal to the visitors' diverse learning styles.

Pleasure and comfort are equally critical. Whatever the urgency of the subject matter, or its bleak content, the exhibition must accommodate the visitors' need for physical comfort (plenty of chances to sit down), a sense of self-worth and confidence (the visitor who feels smart learns most), and even joy (learning should always make one feel happy).

Think of the exhibit gallery, in fact, as a landscape of many kinds of learning opportunities — each of them assisting visitors to grasp the meaning for themselves of the museum's core themes. Good museums should be the most resourceful teaching places.

Flexible Galleries, Even for Core Exhibits

The IAAM galleries should be designed to be flexible. The planning team has recommended a “Delta” strategy, in which key elements of the exhibit galleries (called “experience platforms”) are built to house a much more frequently updatable, changeable set of short-term thematic treatments, called (“scenarios”). As in the world of the theater, the intention is to allow new shows to be mounted without having to redesign the gallery back to its bare walls.

Updating the core exhibits in this way is critical to attracting repeat visits from local residents, and the word-of-mouth recommendation of locals has been found to be the key to attracting tourist audiences and school and adult group visits as well.

Scale and Sequence

Each of the three core exhibit galleries has been allocated 4,200 square feet in this plan, totaling 12,600 square feet altogether. The galleries may be explored in any order. Galleries I and II are interdependent, and may be designed to flow into and through one another. Each gallery is likely to be composed of 10-20 interpretive clusters [see above] and to occupy about 45-60 minutes of a visitor's time. After that amount of time, visitors become eye- and foot-weary, their attentiveness wanes, and it becomes more difficult for them to extract the larger lessons from the miscellaneous material around it. Far better to have visitors reach the end of the galley — at least on their first visit — without having exhausted themselves in the effort. They can be refreshed by time spent in the Gathering areas.

Connecting to Sites Outside the Museum

All through the core exhibits, kiosks serve as “windows” and invitations to extend one's exploration by visiting one of the partner historic and cultural sites in the region. Some are extensive, as descriptions of the Rice Museum in Georgetown or the Charleston Museum's collection of jars by Dave the Potter. Other notifications are briefer, as when an exhibit lists the local cemeteries available for visitors to explore. The special connections to the Old Slave Mart Museum are described in Gallery II.E., below.

Description of the Core Exhibits

GALLERY I: AFRICANS SHAPE THE RURAL LOWCOUNTRY

Focusing questions:

How can we see the surviving traces of the work and culture of African peoples in the rural lowcountry landscape? How did the interaction of Africans with one another, with Europeans, and with the physical qualities of the rural lowcountry shape their development of a new and distinctive cultural identity—in language, art, music, handcraft, religion, foodways, and social customs? How have the geography and topography of the coastal plain and the Sea Islands affected cultural change and cultural retention?

Gallery description:

Gallery I tells the epic story of how African people of diverse ethnicities, dragged from their villages and thrown together in slavery, created a new way of life on plantations in coastal Carolina, where a crop that some of them had grown at home became a staple of global trade. The plantations, which formed the economic basis of the colony, were European in design and control. But patterns of work, social life, local trade, spiritual expression, and culture were inspired by Africa. Under the shaping influence of African knowledge systems and African creativity, tens of thousands of men and women, performing astonishing feats of labor, left indelible marks on the physical landscape and emerging society of their new homeland.

The Gallery I timeline runs from the 1600s to the Civil War. The floor plan follows a meandering path that resembles, in fact, the upper portion of the Cooper River. Each “hill” of high ground at a bend of the river is a site for representing a key aspect of the great transformation in the lives of the African captives and in the use and shape of the land. Stories told at each port of call overlap and take new twists and turns at various points along “the river.” Visitors can follow the river path itself—the route that connected the white plantation-owners to each other. And they can walk the roughly parallel network of footpaths behind the plantations that linked enslaved people on different plantations and helped maintain old African customs, and create new American forms.

Gallery I.A: The Landing

Visitors to Gallery I begin their exploration at The Landing. This area provides a straightforward recounting of the trans-Atlantic slave trade, the arrival of generations of enslaved Africans, the evolution of rice, indigo, and cotton plantations in the rural lowcountry, and the spread of plantation agriculture and the African work force to the

midlands, upcountry, and beyond. Organized as a chronological survey, it provides first-time visitors with historical and geographical background and context through timelines, maps, images, and simple statistical charts. The exhibit emphasizes that the slave trade and slavery were not “sideshows,” in American history, the historian James Oliver Horton notes, but “the main event.” Most of the American colonies were created first and foremost as sites for heavily capitalized agriculture, mining, and resource extraction, rather than as places for independent European yeomen to settle and begin new lives. Enslaved labor was critical to the fashioning of this extractive economy, as was the displacement of indigenous peoples. The longstanding myth of the white European pioneer and settler, carving American homesteads and self-regulating communities out of an empty wilderness, is deeply flawed. IAAM will introduce visitors to another narrative altogether.

But in stressing the importance of slavery, it is vital that IAAM remember its dedication to the African perspective. (Mainstream museums of history should, frankly, be doing a better job at exploring this new narrative.) It is easier, because of the bias of the historical documents, to view timber-rich and rice-growing Carolina solely as the venture of Europeans. Statistics about the wealth generated by trading in slaves and in slave production are fascinating, just as the objects purchased by wealthy planters with those profits are beautiful things. But there are always two sides to these stories, and IAAM has a unique responsibility to locate and interpret the African perspective on these events.

One interpretive approach, for example, would measure the time frame of the museum in the generations of a single family, so the Sierra Leone girl who became the slave Priscilla would be introduced here in an animated profile that becomes the model for her descendants' continuing history.

Gallery I.C: African Know-How, Carolina Rice

Here IAAM describes the introduction of rice to the rural lowcountry, and its enormous economic, ecological, and social significance. The museum explores the transfer of rice-cultivating technologies and work practices from Africa to Carolina. Reconstructing the exact history of rice in Carolina calls for the use of many different investigative techniques. For example, with a series of aerial photographs and interactive maps, visitors will be able to understand how rice culture dominated the countryside, and how it left its imprint on the land down to our own times. Aerial views of the rice ruins provide unique tools for appreciating a feat of labor that rivaled the wonders of the ancient world. Those same images reveal the encroachment of current residential and commercial development on the very landscape that reads like a textbook of African American history. Visitors might manipulate the controls on a functioning model to irrigate a rice crop, make and plant paper versions of rice plants in a sand table, or experiment with side-by-side models of Ghanaian and South Carolinian rice fields — a hands-on approach that contrasts with the hands-off displays of other regional museums.

An interactive “detective” exercise might use clues from Daniel Littlefield's *Rice and Slaves* and Peter Wood's *Black Majority* to explore historical records to find out

“whodunit,” that is, who brought rice cultivation to the Carolinas. In the process of examining ads for the recovery of runaways or for sales of enslaved people, visitors can match naming patterns, skill sets, specific African origins, and African American social networks across the land and inland waterways they dominated.

Gallery I.B: Ibo, Mende, Akan ...

This section highlights the great diversity of African people who arrived as slaves. It explores the astounding variety of language, social customs, appearance, clothing, music, and history of the West and Central African peoples. And it examines the ways in which cultural distinctions became stereotypes among slaveholders; the Ibo, for example, were considered sullen and prone to running off; Mende people made good house servants, and Angolans were prized as field hands.

Source material includes a watercolor entitled *The Old Plantation*, showing Africans in South Carolina playing West African musical instruments and dancing. Visitors might explore African traditions by assembling a wooden puzzle based on traditional Kente cloth design, constructing an African banjo out of wood and string, and listening to different African languages and folk tales at an audio station. The timbre of voices and instruments expresses both confident adaptation to a new land and a deep-seated longing for home.

Interactive computer programs can help visitors trace African language families and see their connections to the Gullah language spoken in the rural lowcountry and to Caribbean variations. Ultimately, it may be possible for IAAM participants to engage in tests that match paternal Y-chromosomal and maternal mitochondrial DNA to specific areas in Africa.

Gallery I.D: Life on the Rice and Indigo Plantations

This area reveals the special characteristics of rural lowcountry plantations where rice and indigo were grown, and explains how the great numbers of people of color on these plantations, their African-based skill in doing this work, and their relative remove from white masters and overseers helped to keep the African past alive and maintain community within the slave population.

A map that makes manifest the routes by which enslaved people traveled from plantation to plantation and from country to town, to visit friends and families, to conduct plantation business, and to hunt and fish, shows how the territory that mattered emotionally to African Americans was different from the territory enclosed by the surveyors' metes and bounds. Paths and trails knitted the countryside into a vital network of aid, resistance, and comfort. Enslaved men and women were masters of the inland waterways as well. Crops reached their urban markets under the guidance of black boatmen, sailors, and navigators. Runaways left via the same creeks and used their mental maps to make their way through the forests and swamps.

A simulation exercise in this area could be played on a map or schematic of a rice plantation, in which the goal is to accomplish the work as quickly as possible and the reward is time to visit relatives at the next plantation. "Chance cards" would include a damaging storm or learning an important trick of rice agriculture from a new African arrival.

Gallery I.E: Cotton Comes to Carolina

This area portrays the emergence of cotton as a lucrative plantation crop that changed the nature of the rural lowcountry and the South. It begins with the history of rural lowcountry long-staple cotton plantations, and the task system of labor that arose as a compromise between planters' needs to get the work done and the enslaved workers' desires to control some part of the day for their own purposes. It expands dynamically to take a broader look at the role of cotton in building wealth and spreading racial slavery to the upland and trans-Mississippi South. It demonstrates cotton's importance to the American and world economies and to the transatlantic and domestic slave trade.

African peoples had produced high-quality cotton cloth in their own villages. Cotton textiles such as chintz and calico, mostly coming from India, were valuable commodities in the trade for enslaved people along the African coast. After technological advances in cotton processing in 18th-century Britain, the demand for the raw fiber from the American South exploded. With the introduction of the cotton gin and other improvements in agricultural technology at the end of that century, it became possible to cultivate the short-staple variety profitably. Cotton became the dominant crop of what we now call the Deep South, from upland Carolina to east Texas. As it spread westward, the black cultivators of this crop developed distinctive regional cultures rooted in the rural lowcountry. The core exhibit explores in detail the contrast between coastal and upland plantations. The short staple cotton industry that employed seventy-five percent of American slaves in 1850 required a much narrower range of skills and led to the "gang" system of organizing work. This dramatically reduced the autonomy of field workers and deprived them of opportunities to gain satisfaction in their work. When the bolls opened in the fields in late summer, men, women, and children all picked cotton, often over sixteen-hour days.

The exhibit will also show that slavery, far from being a dying institution in the years before the Civil War, was being adapted to many new uses — mining, canal and railroad construction, and many kinds of manufacturing.

Gallery I.F: The Challenged Body

This section focuses on how the physical bodies of Africans intersected with the experience of enslavement. It introduces visitors to a variety of African cultural notions about male and female physiology, transitions from childhood to adolescence and maturity, and to the role of ornamentation in these societies. Using travelers' accounts, runaway ads, and evidence from burial sites, visitors will be able to explore how Africans

“exchanged their country marks” (scarifications, filed teeth, body markings) in the process of acculturation in America.

The exhibit will also delve into the way enslaved bodies were nourished (and usually malnourished), what kind of caloric intake and output can be measured for the diets and the most common tasks of plantation labor, and how bone and muscle were worn down, fractured, dislocated, and destroyed by the work enslaved people were required to do. There is tempting evidence of the adaptations, innovations, and evasive tactics that slaves undertook to preserve themselves under these work conditions.

This mini-gallery also explores how slaves were examined for purposes of sale. It considers patterns of fertility, and people's experience with smallpox and other diseases. And it describes the variety of punishments meted out to disobedient, “criminal,” or runaway slaves. Finally, this gallery will address the mutilations and bodily damage incurred in the experience of enslavement — branding, disfigurement, the loss of fingers, toes, and limbs, nutritional deficiencies, and injuries to bone structures and internal organs. Supported by changing exhibitions that examine slavery through the lens of science, this section lays bare the facts of life expectancy from region to region, and crop to crop, over time.

The purpose of this section is not to sensationalize the horrors of slavery, but to present a sobering investigation of the ordinary and extraordinary impacts of enslavement on real people. Nothing was more important in the debates over the legitimacy of slavery than the strange calculation of its supposed benefits to the enslaved population.

Gallery I.G: Black Resistance

In this area, the Museum presents a variety of ways in which enslaved people resisted the debasing effects of their captivity and treatment. Visitors are presented with opportunities to weigh diverse modes of resistance, such as evading tasks, sabotage, theft, masking one's feeling, running away, individual revolt and organized rebellion. Visitors can consider the possible costs and benefits of each method of resistance and the way resistance itself was woven in the fabric of African family and community life, religious practice, and the organization of plantation work.

The Stono uprising of 1739 will be the focal point of this area. Stono was the most far-reaching slave rebellion in American colonial history. Scores of whites and blacks were killed and it took militias from two colonies to put it down. Current archeological investigations supplement English accounts of the rebellion to provide a much deeper understanding of what may have motivated the two sides and of the uprising's international consequences. Official South Carolina's repressive response, the “Negro Act” of 1740, fundamentally redefined the personhood of the region's African peoples and redirected the slave trade temporarily away from Angola.

Gallery I.H: Africans Become African Americans

This area demonstrates a working hypothesis of cultural change: the process of creolization that produced the Gullah language and transformed African art, religion, and social structure into the still-evolving African American culture.

Naming a baby, singing the baby to sleep, roofing a hut with thatch, seasoning a pot of greens, meeting at a well, guarding the fowl house — these everyday occurrences repeated how these things were done in Africa. People brought with them faith in the continuing influence of the dead upon the living, and honored the ancestors with a dance called the “ring shout.” On Carolina rice plantations Africans of different ethnic origins used the ring shout to affirm a new African American identity. Visitors to IAAM hear echoes of the ring shout wherever African Americans make music, from forced dancing on slave ships to hoeing in unison in the rice fields, to church revival meetings, to Thelonious Monk’s ritual of dancing counter-clockwise on stage.

Activities in this area include live or taped performances by musicians, dancers, singers, and storytellers demonstrating that African traditions are an inseparable element in contemporary American and global culture.

GALLERY II: AFRICAN CITIES ON THE CAROLINA COAST

Focusing questions:

For enslaved people, what made city life different from plantation life? What skills did it call for? What special opportunities and dangers did it present?

Gallery description:

Gallery II follows the timeline of slavery, from the 1600s to the Civil War. The design motif is the urban environment itself, marked by right angles, streets and back alleys, a mix of cultures, and very close proximity among all residents. This gallery explores historical and surviving traces of the African influence in the urban landscape of Charleston and other cities, illuminating aspects of the place that have long been hidden from the city's official and entrenched public history. The preferences for certain plants in yards and gardens, for example, or the Gullah cadence of the "standard English" spoken by white elites, all reflect borrowings from Africa. Visitors here gain a new awareness of the landmarks and secret spaces of an underappreciated American treasure.

Gallery II.A: The Wharves

This area examines the city's port, its reason for being. It looks at the work done by slaves in loading and unloading cargo, outfitting vessels, and maintaining the wharves. And it considers how the noisy social world of the waterfront, with its custom of openness and lax law enforcement, affected the lives of the enslaved labor force. The main business of the wharves was shipping the region's staple crops to Europe. Barrels of rice and loose rice in the weatherized hulls of ships, round bales of Sea Island cotton and square bales of upland cotton — all awaited the ocean voyage. Before 1808, the cargoes unloaded at the wharves would have included human cargoes, captive Africans soon to be sold into slavery.

The city is filled with newcomers. The port is a site for eavesdropping on travelers' stories. Here, visitors meet a wide variety of black Charlestonians, enslaved and free, mainly working class but some clearly better off than others. As young museumgoers explore the wharves, they are invited to try to move an actual bale of cotton, or learn to neatly coil a line of rigging. Ambient sound captures the cacophony of wharf life, with its many languages, its shouts and calls, its songs and chatter.

Gallery II.B: The Markets

The markets gave enslaved people — men and women, adults and children — a place to congregate and work, generally without close supervision. Plantation hands came to market bearing all kinds of fruits and vegetables, roots and herbs, wild and domestic fowl, medicines and teas, honey and preserves. Some of this bounty they sold for their masters and some belonged to them. Blacks and whites bought and sold to one another, regardless of social status. This area of the gallery demonstrates how the city's urbanity was something apart from its architecture, and beyond the aims and illusions of its governing class. With photos of contemporary and historic African markets to guide them, visitors could set up a market station by spreading a square of colorful cloth on the floor and displaying an array of foods, handmade goods and baskets in a way that will attract customers. Each object has at least two stories "built" right into it — the story of its ostensible market role and the story of its significance in the lives of the enslaved people who made and/or sold it.

Gallery II.C: Blacksmith Shops

Blacksmiths combined a range of skills to keep horse-drawn wagons clattering through the streets of Charleston and other cities. This area examines these skills, some of which were learned in Africa, and explores ways that blacksmiths incorporated African motifs into decorative ironwork based on traditional European designs. Visitors will also consider the conflict that developed between black and white blacksmiths, who were nearly equal in number in Charleston in the years before the Civil War. For hands-on experiences, visitors might assemble a puzzle version of a horse and cart, in which the work of blacksmiths, wagon-makers, wheelwrights, curriers, farriers, saddle makers, cartmen, and other tradesmen are identified by special colors; they might drive their assembled cart over a bumpy surface, to understand the frequency of repair jobs in blacksmiths' shops. They might "meet" and conduct an interview to hire a craftsman at each of these jobs. Or they might do a rubbing of an African motif that has been incorporated into a piece of decorative ironwork.

Gallery II.D: Construction Sites

This area presents plans and elevations of the historic city of Charleston, and uncovers the work of enslaved people, skilled and unskilled, in building this city and others. It focuses on the enslaved and free black people who created lasting, beautiful structures and used the worksite to teach their skills to younger slaves and free blacks. In addition to conventional interpretations of Charleston's architecture, *Construction Sites* treats the built environment as a set of physical skills, organizational challenges, and interactions with the material landscape of South Carolina. Visitors explore Charleston's regulations concerning "slave hire badges" and delve into the complex relationships of enslaved and free black Charlestonians with working-class whites. Young visitors can try their hands at these skilled trades by using reproductions of authentic hand tools; they might, for

example, experiment with a tool to form a brick with clay from a former brick-making site on the Ashley River.

Gallery II.E: Slave Market

Slave markets were central locations for the enterprise that underwrote all Charleston activities. This section of Gallery I focuses on the moment of sale when men, women, and children were examined like livestock, prices were set and paid, and enslaved people tried to influence the outcome of their own purchase. It highlights the laws that made the trade possible and legal, the numbers of slaves being bought and sold, how these numbers and prices changed over time, who the buyers were and where they were from. It portrays the abusive ritual carried out on the market stage, the physical degradation suffered by the slave and the moral degradation that clung to the buyer.

Visitors here might see a drama drawn as a series of illustrated frames, in which a family is being put up for sale and the question is posed about whether they will be separated.

Visitors will have an opportunity, of course, to explore the re-opened Old Slave Mart Museum, just a few blocks from IAAM. This site will provide a much richer documentation of the domestic slave trade. It would be extremely valuable for the two sites to develop interpretive approaches collaboratively.

Gallery II.F: The Work House

In this area, visitors confront the use of physical abuse in the control of slaves. *The Work House* explores the significance of Charleston's notorious punishment site, where owners sent their slaves for "correction" by a third party. It considers the kinds of infractions that sent slaves to the work house and the punishments typically meted out, from whipping and confinement in irons to the terrifying treadmill. A living history interpreter acting the part of an enslaved person punished in the work house can offer personal memories and advice for the audience about the importance of staying out of trouble. Digital reproductions of South Carolina's essential race laws — models for every other slave colony and state — will show how the authorities tried to regulate minute aspects of Africans' lives, down to the clothing they could and could not wear.

Issues of punishment raised profound questions about the shared humanity of enslaver and enslaved. The workhouse was not simply a horrifying element of urban enslavement in antebellum Charleston, but a popular tourist attraction. Visitors to the city 150 years ago were commonly taken on tours of the building and shown its chambers of horrors. Written accounts by these earlier visitors reveal just how acceptable slavery was to white slaveholders and nonslaveholders alike.

Gallery II.G: A Town House

As the city residences of wealthy white families, town houses were the one place where Charleston's whites and blacks lived in close physical proximity but with exaggerated social distance. *A Town House* looks at the lives of black and white residents, at the work performed by black men, women, and children, at the living spaces they occupied, at the forms of white supervision and black evasion. African American women nursed white babies and served as surrogate mothers, often at a cost of neglecting their own children. Visitors might explore architectural studies and models of black living quarters, where bright colors on the walls and hidden-away places point to the ongoing power of African traditions and social patterns among the enslaved.

Gallery II.H: The Boarding House

Boarding houses were settings where single black slaves were permitted to live together while they worked in the city for days or weeks at a time, supervised only to the degree that the owner of the boarding house was willing. Free black men might live in the same buildings, while white workers, often immigrants who had come to the city seeking seasonal work, lived in similar houses nearby. *The Boarding House* displays archaeological evidence to reconstruct the life of these communal residences, and to consider the issues of family separation, friendship, and the taste of autonomy that were no doubt topics of conversation among the men. In a role play or dramatic presentation, visitors could take the parts of men collected around the boarding house dinner table, offering advice to a resident who has just arrived in the city.

Gallery II.I: The School

How did free black people manage to establish schools and convey the value of education in an environment that criminalized teaching slaves to read and write? Schools for free blacks were shut down after every rumor of slave rebellion or when abolitionist propaganda appeared in mailboxes. Yet, these independent African schools persisted and built a foundation for change. In the records of black benevolent associations, visitors discover the free black point of view, set down at a time when black writing was considered incendiary. The complex drama of this history could be shown by a video presentation focused on the stories and interactions of three men: Thomas Bonneau, a free black slaveholder; Daniel Alexander Payne, chief organizer in Charleston of the African Methodist Episcopal Church; and John Bachman, the city's New York-born Lutheran minister. Free Negroes insisted on calling their churches African churches and their schools African schools. To better understand white fear of black education, visitors might sift through accounts of white efforts to close black schools, comparing the stated reasons and underlying assumptions.

Gallery II.J: The Church

On the plantations, enslaved elders and spiritual parents preserved the African heritage. They taught seekers how to pray, and interpreted signs and dreams. Black Charlestonians needed another kind of leader, a minister who could preach the gospel message forcefully and deflect hostility from local officials wary of any gathering of black people. Every sermon and hymn that suggested that enslavement was a temporary condition contrary to the will of God was considered downright seditious and potentially dangerous. Mass arrests of worshippers on the grounds of disturbing the peace occurred repeatedly in the years preceding the Denmark Vesey plot of 1822.

IAAM helps visitors to understand how black denominations and churches grew inside this dynamic of affirmation and resistance. An online version of Daniel Alexander Payne's *History of the African Methodist Episcopal Church* provides documentation in one form. Recorded testimonials of faith and practice, historic and contemporary, yield another. In the course of becoming African American, not all black people accepted evangelical Protestantism. *The Church* recognizes the minority who maintained their African beliefs or who were drawn to a different type of Christianity. Catholicism's use of sacred objects and practice of venerating saints appealed to many Africans who were exposed to Catholic teachings before and after coming to America.

The church area has an aura of spirituality and an effusion of song that cannot be suppressed. The architecture of urban church buildings and rural praise houses is a text itself, and there is a shape to the intangible, shared sense of seeking that unites the community of God's people.

GALLERY III: DEFINING FREEDOM BY THEIR ACTION

Focusing questions:

How did the special characteristics of slavery in the rural lowcountry affect life for South Carolina's blacks after emancipation? Given its history, was the state safer, or more dangerous, than other Southern states after the war? How did African Americans as a group and as individuals contribute to the evolving definition of freedom? What happened when this effort met white determination to restore white supremacy at any cost?

Gallery description:

The focus is on the century that followed emancipation, from 1865 through the modern Civil Rights Movement, and the different ways that blacks have worked to define what freedom would really mean to them and their people, even as whites found new ways to subjugate blacks. The freedom-seeking theme is reflected in the design of the gallery, which takes an abstract shape, warmed and enlivened by individual stories. Each area includes written profiles and photos of known people who actively worked to define and expand this freedom, as well as interactive devices that help visitors engage in some of these decisions and difficulties. The gallery feels alive and human, with sepia portraits, contemporary snapshots, music, family trees, and other devices. The Slave Narratives from the Federal Writers' Project will be a major documentary source for this gallery — over 300 black South Carolinians were interviewed.

Gallery III.A: The Freedom to Work

Visitors to this area follow the lives of freed men and women as they leave their old employers behind and search for work. They explore the sharecropping system that develops in the countryside, a compromise between the needs of whites and blacks, and the range of jobs available to those who sought work in Charleston. They learn of a surprising level of militancy and organizing among some workers, and follow the development of a black middle class in the story of Herbert A. DeCosta, Sr., operator of a family-owned construction business. And they will see and hear the work of black musicians like Freddie Green, Jabo Smith, and Dizzy Gillespie, writers like Alice Childress and Dorie Sanders, celebrated ironwork artist Philip Simmons, and untold numbers of nameless quilt-makers and storytellers who brought their African roots to the work of interpreting and expressing the African American experience. Visitors might be introduced here — by video, live interpreters, or other forms — to the stories of some of Priscilla's descendants, and their actual experiences finding work after slavery.

Gallery III.B: The Freedom to Learn

This area follows the thread of education from Gallery II and carries it forward into the post-emancipation period. It explores the founding of the Avery Institute and Bettis Academy, the establishment of statewide public education in 1868, and the growth of publicly funded colleges. Stories include those of Charlotte Forten and the founders and students of the various schools, including Alexander Bettis, Jacob J. Durham, Matilda Evans, John Dart, and others. The white response is examined in the establishment of separate-but-equal facilities after *Plessy v. Ferguson*. South Carolina's leading role in the struggle to win equal education is treated in the *Briggs v. Elliott* case, an important step to the *Brown v. Board of Education* decision. In a role-play exercise, visitors might take the parts of players in the Summerton case, where black parents tenaciously demanded equal transportation to public schools, ultimately supported by only one white judge. Or they might use computer stations to explore the curriculum offered by the Bettis Academy; there might be a game in which they have a certain amount of time to learn some unfamiliar facts, followed by a test.

Gallery III.C: The Freedom to Worship

This gallery explores the flowering of Afro-Christianity after the Civil War, focusing on the work of Rev. Richard H. Cain in re-establishing the AME, and the close ties between the new educational institutions and the churches. It follows the growth of black churches, their signature blend of African traditions and Christian doctrine, and their role in the community as educators and training grounds for new leaders. The exhibition will profile the work of Baptist Rev. Richard Carroll, a major missionary figure in the late 19th and early 20th centuries, and philosophically South Carolina's equivalent of Booker T. Washington. Other figures are also brought to life through re-enactments of the issues that animated their ministries. Rev. Alphonso Blake of the Morris Street Baptist Church in Charleston was well known for his compelling preaching and social activism. At one of the many audio stations, visitors can hear the recording of the WPA interview with Albert Carolina, describing the founding of the Heaven's Gate Methodist church in Murrells Inlet, S.C.

Gallery III.D: The Freedom to Be

The focus here is the right to self-determination of the most ordinary, and most critical, kind — to be yourself around whites, go out at night, walk down a street, hang out with friends, flirt with a pretty girl, take a street car. This area treats the sudden arrival of these freedoms after slavery as detailed in letters and diaries, the loss of them under the tactics of the KKK and lynch mobs, and the struggle to regain them. Audio or transcriptions from the WPA project would give visitors first-hand accounts of how these simple freedoms were sought, denied, and sought again.

Gallery III.E: The Freedom to Participate

Beginning with the Colored People's Convention of 1865, this section looks at black strategies for gaining the rights of citizenship and the protection of the law to seek an education or acquire land. It also looks at blacks' decisions to enter politics and seek public office in Charleston and in other parts of the state. Profiles include Robert Smalls, Joseph H. Rainey, and Francis Cardoza, first African American to hold statewide office in South Carolina. The surging power of white supremacists is examined in the 1876 elections, the Hamburg Massacre, and the new election laws that followed, culminating with the Constitution of 1895 and the era of Jim Crow. Black responses varied, from accommodation, to migration, to ongoing struggle by way of the NAACP and other organizations. This area covers the black struggle of the early 20th century up to the Civil Rights Movement. Visitors might compare the Declaration of Rights and Wrongs from the Colored People's Convention in 1865 with the state constitution of 1895, exploring both the hopes of the black community and the way the legal system was corrupted to deny blacks their rights.

Gallery III.F: The Freedom to Fight Back

Blacks always exercised the right to fight against slavery and racism; the IAAM is rich with examples throughout history. This area focuses specifically on the Civil Rights movement as it played out in and around Charleston in the mid-20th century. Profiles include Sara Flemming of Columbia, who sued South Carolina Electric and Gas over segregated buses, and won; Septima Clark, an educator who was hired by Dr. Martin Luther King Jr. as the director of citizenship education for SCLC; and the Cannon Street All Stars, who waited half a century to be named the 1955 Little League state champions. The broader struggle for racial equality is told by way of the Greenville sit-ins, the effort to integrate Clemson University, and the bloody Orangeburg Massacre. Visitors will hear and learn the history of the anthemic *We Shall Overcome*, a spiritual originally sung on John's Island. Video and audio stations can present the real speeches and images from this period to bring this Movement to life. Visitors might also look at the 1964 Civil Rights Act, compare it to earlier documents, and hear current arguments about its failures and successes.

Contributing Stories

This story is constantly being augmented by new episodes in the struggle for equality in South Carolina. Room will be provided for such additions, drawing visitors' attention to new efforts at historic preservation and interpretation throughout the state. Among these milestones are the increasing recognition of Harriet Tubman's work in leading Union troops over the Combahee River between Beaufort and Colleton counties; the creation and flowering of the Gullah Geechee Nation; the ongoing work of the Penn Center, and the issuance of the *Low Country Gullah Culture Special Resource Study and Final Environmental Impact Statement* by the National Park Service Southeast Regional Office in 2005.

In addition, all through this gallery, visitors are invited to deposit their own narratives of their personal and family experiences in confronting oppression and seeking freedom. These are recorded in a simple, self-activated video recording device like the one pioneered in the *TELLING LIVES* program of American History Workshop. Visitors enter their names and pertinent contact information on a touch-screen monitor, and follow the computer's simple instructions – akin to those on an ATM – start recording. The most productive results come from interviews of about 8-12 minutes, usually divided into responses to three or four questions.

IAAM staff download the collected stories periodically. A simple indexing program, like the one created by the Randforce team in Buffalo, New York, creates an electronic file providing basic access to the entire collection of narratives by subject. Researchers can then sort and take away on a separate file all the anecdotes relating to voting rights, or to voting rights in Columbia, or to voting rights struggles involving women in Columbia during the winter of 1965-66. The video recordings are never transcribed, but they are much more conveniently and inexpensively accessible in this way – and they retain their video format with all the information it contains about body language, emotional expression, and the like.

Employing this system resulted in the collection of more than 6,000 interviews with visitors to the “*Slavery in New York*” exhibition in New York City during 2005-06. Visitors can contribute an enormous amount of new information to historians and museum curators in this way. In addition, we have discovered that the experience of telling one's story to the museum profoundly strengthens the impact of the museum visit. Cognitive psychologists speak of the value of “externalizing” one's learning in a verbal summary as a significant aid to long-term learning.

Such an experience is not, of course, the same as an oral history project and does not substitute for one. The stories are not necessarily so complex, as there is no opportunity for follow-up questions. But such short interviews and such a simple indexing system can identify candidates for a full-blown oral history interview as a follow-up to the museum visit.

All through the core exhibition galleries at IAAM, there should be monitors playing clips of visitor recordings. This has the effect, we have found, of assuring all visitors that they are welcome to have and to voice strong reactions to the exhibit subjects of the museum.

Part II, Chapter 3: IAAM's Changing Exhibits

After passing through the welcome area, visitors can choose to enter either the **CORE EXHIBIT** or the **CHANGING EXHIBIT GALLERIES**. The core exhibit — a long-term installation that occupies approximately 12,600 square feet (perhaps two hours of visiting time) — tells the museum's main narrative.

Visitors who have already seen the core exhibits, or who have less time to spend, may choose to go first to the changing galleries, approximately 7,500 square feet, divisible into two or three spaces. IAAM should aim to schedule three changing exhibitions every two years, so that a new show opens approximately every eight months. Perhaps two of three concurrent shows will be on loan from other museums or traveling exhibition services. Some exhibits will be generated by IAAM, or produced in collaboration with partner museums and educational institutions in the United States and abroad.

African American history, art, culture, and science, and connections to the African Diaspora in the Americas and around the globe, are all potential fields of interest. Selection criteria need to remain flexible and museum staff should aim for a diversity of subject matter, geographic focus, style, and media in its changing galleries. What follows is a sample fourteen-year schedule of changing exhibitions intended to help us imagine what IAAM might bring to Charleston's cultural scene. Drawn from a nearly infinite menu, these ideas are starting points from which curators could shape a coherent and compelling calendar of events. Exemplary exhibits that have been mounted in the recent past are marked with a single asterisk (*).

These are not proposed as an actual schedule but only to represent the kinds of possibilities for exhibits that IAAM might mount in the future. (A few may in fact still be available when IAAM opens.) New shows, requiring funding and organization by IAAM, are indicated with a double asterisk (**).

As an organizing principle, the temporary gallery spaces are divided into (1) local or regional subject matter, (2) international or cross-cultural themes, and (3) displays of visual or performing arts.

Year I / II

- (1) *"A True Likeness: The Black South of Richard Samuel Roberts (Columbia, SC), 1920-1936"* *

The museum should regularly feature the work of African American studio photographers. Besides Roberts, candidates include Michael Francis Blake (Charleston, South Carolina, ca. 1912-1934); Prentice H. Polk (Tuskegee, Alabama, ca. 1939-1985); and James Van Der Zee (Harlem, New York, ca. 1915-1975).

(2) *Race & Racism: Jim Crow in America, Nazi Eugenics, and Apartheid in South Africa* **

(3) *“Transatlantic Dialogue: Contemporary Art In and Out of Africa”* *

An aesthetic conversation has recently developed between African and African American artists as they work from different perspectives to reconcile their African identity and heritage within the currents of contemporary art. This exhibition explores the varied ways that African and African American artists interpret their ideas and identities. Similarities of style and diversity of expression emerge from a shared African heritage.

Year III / IV

(1) & (2) *Cutting-edge research on molecular biology & DNA* **

Science exhibit explores the implications of genetic research for writing family history. Major IAAM initiative, federally funded, mounted in collaboration with science or natural history museum, designed to travel to other sites. Link to science laboratory & genealogical research center located in the museum's Learning Center.

(3) *“Homecoming: The Art and Life of William H. Johnson”* *

In images ranging from cotton fields and dance halls to city streets and pulpits, South Carolina-born William Johnson (1901-1970) chronicled the daily life of African Americans as well as political and social concerns. Curated by Richard J. Powell, “Homecoming” focuses on the paintings Johnson produced upon his return to New York after extensive travels in Europe and Africa.

IAAM might incorporate Johnson's European work, as well as that of other African American émigré artists. As a matter of policy, IAAM should exhibit major 20th-century painters such as Johnson, Romare Bearden, and Jacob Lawrence, and also more recent artists, such as Kerry James Marshall, Martin Puryear, Leo Twiggs, Jonathan Green, Tom Feeling, Roland Freeman, and others.

Year V / VI

(1) & (2) *Home Sweet Home* **

Building on years of field work, this exhibit portrays the lifestyles of black southerners of diverse occupations: e.g., school teachers, preachers, domestic workers, farmers, laborers, carpenters, mill workers, hospital workers, doctors, lawyers, etc. Exhibit material would be assembled from private collections and developed through workshops and photography residencies in schools. Family photos, memorabilia, furnishings, etc.

would be displayed in recreated environments representing the homes and workplaces of the subjects.

(3) *“Ethiopian Passages: Dialogues from the Diaspora” **

Features the work of ten contemporary artists whose creative approaches, chosen media, artistic narratives, and personal histories share an attachment to Ethiopia. Perhaps more than any other group of African peoples in the last part of the 20th century, Ethiopians embarked on journeys, both near and far, fleeing difficult circumstances at home.

Year VII / VIII

(1) *“Camera Man’s Journey: Julian Dimock’s South.” **

Based on a collection at the American Museum of Natural History, the current exhibit was organized by Nina Root and Thomas Johnson.

(2) *Education for Freedom and Democracy ***

AMA schools, Rosenwald schools, county public schools, traditionally black colleges, etc. Features the struggle of African American parents to educate their children in the face of legal barriers, social and economic pressures, hostility and indifference. Presented in comparison with experiences of other people of color, for example, Native Americans, Latinos, and Asians.

(3) *African Brazilian Rhythms: The Spirit of Celebration ***

Programs might include music, dance, film, and street performances. Could be produced in collaboration with Fundação Museu Carlos Costa Pinto in Salvador, Brazil.

Year IX / X

(1) *Hats & Handbags: Going-to-Church Attire ***

Contemporary artifacts plus historical photos and costumes borrowed from museum collections. Commission local theater company to perform the play “Crowns.”

(2) & (3) *Baskets from Two Continents ***

An ethnographic comparison of African and African American basketry. Tremendous possibilities for public programming.

(1) *Jenkins Orphanage Band ***

Major exhibition, film, and public programs produced in collaboration with the Avery Research Center at the College of Charleston.

Year XI / XII

*(1) Civil Rights in Charleston * **

Beginning with the earliest efforts at self-emancipation, the exhibit looks at the subject historically and concludes with present-day struggles for justice and equality. Accompanied by a film series and public forums.

*(2) The Negro Baseball Leagues **

With a sidebar show about South Carolina's black baseball teams.

*(3) "Audible Artworks: Selected African Musical Instruments" **

This exhibit of musical instruments demonstrates the formal inventiveness of African artists who create objects that are a delight for the eyes as well as the ears. A listening station provides sample recordings of music made by instruments similar to those on display.

Year XIII / XIV

*(1) & (2) & (3) "Against the Odds: African-American Artists and the Harmon Foundation" **

With sidebar show on the Charleston Renaissance, produced in partnership with the Gibbes Museum of Art. Great opportunity here for a two-venue show & joint programming. The Gibbes could focus on Charleston Renaissance artists' depictions of African Americans, with a "postscript" on the Harlem Renaissance. IAAM would highlight the Harlem Renaissance, with reference to Charleston.

*(4) "Afro-American Arts of the Suriname Rain Forest" **

Drawing on their diverse African pasts, the Maroons of Suriname, in northeastern South America, have created a way of life rich in artistic expression — woodcarving, textile arts, calabash decoration, and the myriad arts of performance.

*(5) From Jazz to Hip-Hop: Music, Dance, and Fashion * **

Programming could include fashion shows and concerts of period music.

Part II, Chapter 4: IAAM's Other Public Spaces

THEATER

This space, with about 125-150 seats, serves two functions. First, it is a top-quality, state-of-the-art theater for film presentations. It can also serve as a venue for cultural programming — lectures, musical concerts by small ensembles, story-telling and dramatic readings, large-group seminars, and family reunions — sponsored by IAAM or by others. It may be rented out, an important source of potential income.

The planning team recommends producing two films for regular showing in the museum theater in the long run, but starting with one rather good one. Given the subjects to be interpreted by the museum, film is a particularly apt medium.

The first film to be undertaken should focus on “The Search for Carolina.” Taking its viewers on an international journey, the film would trace the origins of the people, the work skills, the cultural traditions, the technology, and even the flora and fauna of South Carolina in far-flung areas of Africa, Europe, Asia, and the Americas. The film might, for example, compare the landscapes both of West Africa and the Carolina rural lowcountry through dramatic aerial photography, assess the relationship among dialects and musical forms, and link global patterns of cloth- or net-making. But the story should not simply look backward, and trace history in only one direction. The film should pay as much attention to the evidences and influences of South Carolina’s own traditions in other places. In sum, this is a film that powerfully demonstrates the international-ness of this place.

The second film is envisaged more like a meditation on the most difficult and emotionally wrenching aspects of the story we want to tell. IAAM would seek a senior, celebrated filmmaker, with deep ties to South Carolina and to this story, to create a very personal interpretation of the pre-slave trade history of Africa, the process of enslavement, the middle passage, and the generations of horror endured by Africans in this place. The planning team believes that it would be extremely difficult to couple this kind of film with the more positive message of the first one, and thus it might make sense to separate them entirely.

IAAM will be continually pressed to expand its interpretive efforts to the history and contemporary life of Africa. This is much better accomplished through film than through exhibitry. Several African American history museums have attempted to interpret the pre-slave trade history of Africa, but they most often rely on long text panels, illustrated by well-worn textbook images. Objects of this past are rare and seldom available. (Western museums only began to collect African objects in the early 19th century. Archeological

materials are available, as are archival documents in some cases, but these have limited value for museum interpretive exhibits.) It is better to turn to the film medium for this part of the interpretive program.

Given the composition of the prospective IAAM audience, providing a sit-down film has particular advantages. Older visitors on bus tours may find a scheduled film presentation an easier way to take in a museum than unstructured tours of an exhibit gallery. Many tourists to Charleston want to divide their time among a plenitude of attractions. Museums frequently find that visitors are more willing to pay a surcharge for a film showing than for a special exhibit or for the core exhibits, so the films might provide significant income and/or allow other program elements to be offered at lower cost.

Ultimately, when both films are available, each of them could play alternately for 25-45 minutes in the museum theater. Visitors might choose to see one or the other, or both, or to bookend their visits with visits to the theater. Of course, some visitors would choose not to see the second, more difficult film, especially those with young children.

It makes sense to explore the possibility of enlisting Hollywood's top African American talent in the production of these pieces. This might bring IAAM a major accession of production talent and resources. The film would be co-produced by IAAM using a competitive process to work with a film co-producer who can make sure the film delivered is accurate, marketable, and on budget. In this way IAAM encourages the filmmaker's artistic expression but also maintains final editorial control.

The income producing, marketing, and development potential for such films and such a theater space cast a wide net. Often such theaters are the most easily funded aspects of a museum project — they provide great naming and sponsorship opportunities. And if there are great films, made by celebrity talent and incorporated into the museum experience, this will make the museum a more powerful attraction.

THE GATHERING

THE GATHERING is less a single, specific area of the museum than a positive and warm attitude that links together a variety of visitor-service spaces. Here, we are saying, you are welcome. Here you may find yourself recognized, your roots respected, your stories treasured, your memories collected and preserved, your history told honestly, your peoplehood affirmed.

THE GATHERING is also a process. From the ground floor of the site, IAAM announces that it is part of the city. A busy marketplace holds forth on weekend and summer mornings, and possibly all through the year. Craftsmen display their wares for sale. There may be occasions when ritual ceremonies are offered in this area.

Once inside the museum doors, a personal greeter welcomes visitors. The space stimulates the visitors' senses. It is brightly colored, fragrant, richly textured. Melodies and rhythms, and the intonations of Gullah, are heard.

Each person entering is invited to register in the visitors' book and this creates a living electronic portrait of the museum's community. Visitors may be told of others from their hometowns or neighborhoods who have visited the museum. They are invited to send email messages to friends and family around the country, and they are reminded of African American historic sites and cultural organizations where they come from. (As they join the IAAM web-based community, they are initiating a communication that may continue long after this first visit.) They are, in short, invited to feel like a part of the story and the story telling.

The **Welcome Area** also informs visitors of events in the museum and around the region and state. Tickets are available for entrance to historic sites and museums, for bus, walking, and carriage tours; and for performances, films, and educational programs. The **Partners Showcase** introduces visitors to the excellent opportunities for pursuing their interest in African American history at other museums and historic sites, or through tours of the region.

Adjacent to the Welcome Area, visitors encounter the **Family and Community Memory Wall**. An easy-to-use instruction panel asks visitors to look for names, places, trades, schools, churches, or types of stories (growing up, schooling, military service, work and play, travel, family experiences). Once the selection is made, visitors can call up a short video recorded by previous visitors at IAAM's **Oral History Center**. These video clips memorialize those lives we never want to forget. Visitors are also invited to deposit their own memories of an important person or event in their own family's life. The Memory Wall tells everyone that this is a museum by, for, and about people like us. The multitude of faces is a vibrant symbol of the rich diversity of the community this museum interprets. And this living, ever-growing memorial wall of stories can also be an important source of income for the museum.

Either at the beginning or the end of their passage, visitors come to IAAM's **Roof Garden**. An artist and landscape architect will be commissioned to design a place wherein visitors can connect to the spirits of the African ancestors. "Blessing pots" of water may be an important feature of the garden. Rituals using water are common all over the world of the African Diaspora. Visitors find opportunities here to signify their respect for such spiritual connections as they move through the garden. As they look out to Sullivan's Island and the open ocean beyond, they should be able to feel themselves in the flow of time, terrible and wondrous, at one with those who have come before.

As they begin their passage through the museum, IAAM visitors will encounter the changing exhibit of **Community Icons**. Here they discover a half-dozen iconographic objects in large cases. This assemblage of artifacts and works of art expresses some of the basic premises of the museum — its respect for the work and life experiences of ordinary people; its attachment to local places and cultures; its determination to tell a global story; its role as a place of public exploration of what has long been ignored.

While specific objects will change over time, the categories will remain the same. For example, these entry cases might contain a "Dave jar" or an antebellum quilt; artifacts of slavery — slave hire badges, chains, and collar; Penn School's liberty bell; vestments

from St. Marks Episcopal Church; decorative ironwork; and a contemporary lowcountry basket. (The basket could be replaced every year with a new one purchased by a special fund. The baskets being made today are spectacular; now is the time to begin a collection of 21st-century work.)

NOTE: *This collection is an exception to the dictum that IAAM will not be a collecting institution. Most of these "icons" will be on regular display throughout the building. Other original objects and images may be acquired for inclusion in the core exhibits. The criterion will always be relevance to the key stories being interpreted. The wagon used to transport enslaved people (or free black sailors in port) to the workhouse will always be significant. So, too, would be Robert Smalls' cap, or a model of the steamer Planter that he commandeered out of Charleston harbor. But furniture, say, that Smalls owned later in his career, and that played little or no role in the dramas for which he is noteworthy, is not first-choice material for an IAAM collection.*

Another corner of the entrance floor contains a small **Community Gallery**. Here a local historical society, high school, or college can mount a mini-exhibit, a book by a local author can be featured, or an upcoming community event can be previewed.

The corridors connecting the exhibit galleries constitute a **Pathway of the People**. Perhaps they are, in effect, retracing a waterway that is architecturally incorporated into the circulation of the building. Ornamental ironwork along the Pathway symbolizes the transformation of the constraints of enslavement into celebrations of beauty and utility. Community meetings have affirmed the primary importance of water as a spiritual symbol for African and African American people. From time to time, the pathway gives visitors a chance to peer out to the landscape of the city and the harbor. Just as important, the pathway allows visitors to peek in and see school-age children exploring and learning from the historical materials in the Core Exhibit Galleries.

A special aspect of the **Pathway** will be the IAAM's **Theater**. Here films, lectures, forums, and performances will be welcomed at hours when the museum's own film programs are not showing.

Part II, Chapter 5: IAAM's Learning Center

THE LEARNING CENTER

The planning team proposes that IAAM feature a *LEARNING CENTER*. This unique asset would provide resources for community-based teaching and learning beyond the core and changing exhibits, programs, and installations of the museum itself.

The planning team has conducted many meetings and interviews with community members to ascertain what kinds of *LEARNING CENTER* programs would be most attractive.

ORAL HISTORY CENTER

Thus far, the most popular has been the commitment to collect and preserve oral histories. This would require:

Oral history interviewing off-site and on-site by staff, interns, and volunteers.

A "Telling Lives" or other portable recording program for easy and inexpensive gathering and archiving of stories in digital formats.

Incorporation of oral history into program offerings for visiting churches, community groups, and family reunions.

Provision of a studio for interviewing and recording oral histories digitally, for editing, and for producing mini-documentaries that can be included in museum exhibits, educational materials packages, Websites, and other media. Perhaps in conjunction with the technical facilities and expertise of South Carolina ETV and the College of Charleston.

It is estimated that 800-1,000 sq. ft. should be dedicated to the Oral History Center.

COMMUNITY MEETING FACILITIES

A second major area of interest has been multi-purpose Community Meeting facilities. These would be used by IAAM itself for discussions, seminars, lectures, and public programs. A space for 75 attendees, divisible into three smaller areas, would be recommended. One of the three should be outfitted with media equipment and communications ("distance learning") systems. A small "warming" kitchen, off a commons area that connects the three meeting spaces,

should be included. All the spaces may be connected for use with a family reunion group.

Chief among the uses are introductory genealogy and family history workshops for local residents. Offered mainly during weekends and evenings in collaboration with the Charleston County Public Library (which is the best local repository for beginning genealogical inquiries) as well as other institutions, these workshops might also be available to visiting groups. (We do not recommend that IAAM create a collection of genealogical or historical resources for public use, as this would duplicate existing resources among partner institutions.)

These spaces should also be made available during other times of the week for community groups, at low or no cost. Other parties may also rent use of the space.

The commons area is estimated at 500 sq. ft., and each of the meeting rooms at 800-1,000 sq. ft., bringing this area to a total of about 3,000 sq. ft.

**TEACHER
CENTER**

A third special Learning Center space would include IAAM's Teacher Center. This is a resource area and loan collection of curriculum materials, kits of reproduced artifacts and documents, and other tools helpful to teachers of African American history and culture. Workspace will be provided for teacher meetings, as well as computers and copying equipment for downloading and duplicating classroom materials.

The Teacher Center should occupy about 400 sq. ft.

**YOUTH
CURATORS
CENTER**

IAAM's Youth Curators Center will engage high school students and young adults in career awareness and skill-development programs. Junior curators can work on developing research, writing, and technical skills while they contribute to the museum's program efforts. Students from area schools can serve "residencies" at the museum, produce projects for school and community use, and assist museum staff and other area professionals.

The Youth Curators Center may be developed in collaboration with the Children's Museum of the Lowcountry, the Gibbes Museum, the Charleston Museum, the Avery Research Center, and other regional museums, as well, of course, with local school districts and youth groups. Spoleto's "Youth Fellows" provides a good model of such a program.

The center will include meeting and project-preparation space of about 1,000 sq. ft.

Part II, Chapter 6: IAAM in its Regional Context

A REGIONAL INTERPRETIVE INITIATIVE

From the inception of the IAAM Board, there has been a strong consensus that the interpretation of African American history and culture in this region should not be confined within the walls of a new museum. Rich historical resources abound in the community. Unlike any of the African American history museums existing or planned in the United States, IAAM will be able to invite visitors to reach beyond its walls to find important historical traces and vibrant continuing expressions of African and African American culture. IAAM will not duplicate excellent exhibition experiences that are currently available at nearby sites.

A comprehensive plan for a Legacy Fund, designed to assist in regional interpretive development and connected to IAAM, has been adopted by the Board, and is described by Board members in Working Paper II of this report.

Much of the responsibility for creating the regional interpretive initiative lies beyond the scope of IAAM's Board, board, staff, and design consultants. This initiative will require active leadership from other organizations around the state.

The Museum in its Regional Context

Wherever possible, IAAM can incorporate elements of the surviving historical landscape in its core exhibits. An exploration of the rice economy, for example, should tell visitors that they can visit specific museums, historical landscapes, and archival collections in the region "to see the real thing" in its accurate historical setting.

Second, the exhibit galleries themselves should include live interpreters — as staff and volunteer museum teachers — who can make personal connections between the interpretations offered and the historical environment beyond the museum's walls. For example, the dramatic history of the Morris Brown AME Church can be told from the perspective of a church member as well as a museum teacher, and visitors can be invited to come to services on the following Sunday.

Third, the museum will be a gateway to regional sites. The ***Partners Showcase***, in the entrance lobby, has an up-to-date listing of programs. Bus, walking, and carriage tours may begin and end at the museum's door. Family reunion programs hosted by the museum can be linked to tours and events at other places.

Fourth, the museum will provide meeting spaces and up-to-date electronic tools to other institutions. Its ***Oral History Center***, including the video editing and Web design studios, should be available for use by others. The ***Teacher Center*** will collaborate with other cultural organizations and with local school districts.

A Regional Team of Interpreters

We propose that ***a regional team of interpreters*** be trained to share responsibilities both at the museum and at other regional sites where African American history is an important focus, including the Aiken-Rhett House, Avery Research Center, Drayton Hall, Middleton Plantation, McLeod Plantation, Boone Hall, Charles Towne Landing, Fort Sumter National Monument, the Old Slave Mart Museum, and others. Team members can rotate from one institution to the next, adding a broad regional perspective to each site. Staff sharing will enhance the sites' commitment to high-quality and accurate interpretation. It will improve professional skills at all these organizations, and keep interpretation of African American history and culture fresh. Funding for the recruitment and training of this regional interpretive team should be developed through shared efforts.

Part III, Chapter 1: Architectural and Systems Program

This chapter explores the broad design criteria and operational characteristics that are important to the new International African American Museum (IAAM). An outline architectural program is delineated with guidelines for planning the learning environments that IAAM envisions. Specific aesthetic, physical, and operational requirements of the site and building will be examined in much greater detail at a later phase of work and captured in IAAM's *Architectural Room Book* [often called the "architectural program"], which will communicate IAAM's functional needs and specifications to the architect. This chapter provides an outline of those requirements.

In addition to its functional requirements, IAAM's building will play an important symbolic role among Charleston's other museums. Facing on to Liberty Square, IAAM's building has the opportunity to make a powerful statement about the role of the African American community in the history and culture of the region and the nation. This external image of the building however must come from the functional organization of spaces inside the building that work together to create an excellent visitor experience and an economically operational facility.

The building, particularly the exhibits, has been scaled back 11% from an earlier estimate, for its current total just under 60,000 gross square feet and 42,580 net square feet, which includes 21,400 net square feet of exhibit space. The planning team feel that any smaller size will do a disservice to the story IAAM is trying to tell, the purposes it is established to serve, and the operating requirements.

OBJECTIVES

The new IAAM building and site will be more than just a place to house exhibits and educational programs; they will achieve the following:

- A. Convey, support and enhance the Museum's mission and support the plan's exhibits and programs
- B. Be bold, striking, attractive, welcoming, and accessible.
- C. Readily communicate the presence of a popular, accessible museum, expressing on the exterior the nature of the experiences within. The

architecture and landscape design will express to visitors the appeal of the programs within, encouraging them to enter and participate.

D. Project an ambiance of friendliness and fun, inviting visitors of all ages to explore its resources and discover more about people and the world. The IAAM environment will:

- not be neutral; instead it will be dramatic and exciting, promising adventure inside, and full of encouragement to visit again.
- be a gathering place, both inside and outside, a source of community pride and a common anchor for the local community.
- be engaging and inspirational. It will function as a landmark in Charleston.
- fuse program, architecture and site into an integrated visitor experience, with careful attention to the sequence and flow of the visitors' movement.
- be designed to facilitate modifications and program changes, allowing it to evolve with new uses (and users) over time.
- be accessible to all patrons, regardless of physical capacity or native language.
- be a statement of Charleston's recognition of the importance of its African American heritage and future.
- use materials and technology in ways that reduce maintenance and operations costs, and longer-term replacement costs.
- demonstrate an understanding of the specific site, its strengths and weaknesses, and applicable building codes.
- provide flexibility for the future.
- get built within budget.

PROJECT OVERVIEW

The International African American Museum will be located on a visible, accessible, appealing and important site near the waterfront across the street from the Aquarium in Charleston at the head of Liberty Square. The IAAM will occupy a 59,612 gross square foot building that is bold and visually striking, welcoming, highly flexible, functional, and embodies the IAAM mission. The IAAM project enjoys the benefits and challenges

of being adjacent to the South Carolina Aquarium, the IMAX[®] Theater, and the National Park Service's Fort Sumter Tour Boat Facility, sharing access and parking facilities.

The site faces Liberty Square and the design should take advantage of the opportunities of continuing this public park under the IAAM building. Installing a different street texture between IAAM and Liberty Square and even closing the street during special events will help connect the two sites.

BUILDING

The physical home of the International African American Museum will be a significant new presence in Charleston. It will be perceived in myriad ways, but four modes will stand out:

- a) seeing the building as an abstract object in space;
- b) seeing the building as an object in context with its surroundings;
- c) perceiving the building as an image, as the manifestation of an idea;
- d) understanding the building as a strategic arrangement of functional spaces

Building as Object

- As a new landmark destination, the IAAM will be readily identifiable and easily observed. It will stand out, while complementing its environment.

Building as Context

- The IAAM building should maximize its connections to Liberty Square and to the National Park Service's Fort Sumter Tour Boat Facility. This significant public open space is bordered by other major cultural attractions, and IAAM can play many roles to achieve the utmost benefit from this strategic location — an architectural focus for the open space; a symbolic statement; a practical connection between the parking structure behind and Liberty Square and its other attractions; and an economic role and visitor amenity through the ground-floor market.
- The IAAM and its surroundings will be an integrated experience that is replete with choices of route and destination for visitors. In addition to choices within both entrance and exit sequences, visitors will have choices of major venues from a Main Lobby, as well as choices of Exhibit Areas from an Exhibit Hub. While security and efficient ticket taking are obviously important to the operation of IAAM, it is important that the visitor's experience be self-directed.

- IAAM's Exhibit Areas, Theaters, and Themed Program Labs/Classrooms will be designed as environments for learning. While the exhibit and theater designers will be responsible for many aspects of this, the architecture is expected to create the context for these learning spaces by providing them with character, flexibility and built-in systems appropriate long-term learning needs of each.
- IAAM should assess what other needs for space exist in the immediate neighborhood to see if there are opportunities to include a few other revenue-producing spaces on its site beyond what is in its own program. Presumably, the revenue potential would have to be high enough to justify conventional finance for such development. Given the size of the site and the size of the program, these opportunities are likely to be small pockets of space on the lower floors and the possibility, within restricted height limits, of adding larger spaces above IAAM. Because these spaces will be integrated into the building, IAAM should look for tenants who have similar missions and fit with the brand. The site is not large enough to turn over to a private developer to create a mixed-use development with IAAM as one of the tenants.

Building as Image

- The IAAM building will be a key piece of the organization's image and identity. It will contribute to visitors' desire to enter and engage in the center's learning spaces and programs.
- The image of the building must ensure a broad appeal. The building itself should be inspiring.

Building as Space

- The net interior program area of the building is currently projected to be approximately 42,580 net square feet (59,612 gross square feet) within that, the exhibit areas and their adjacent support spaces will total 21,400 net square feet.
- The interior program areas are tall (often 24 ft. clear), and the resulting massing of the building will be significant.
- The massing of the entire building is preliminarily calculated to be more than 1.25 million cubic feet.

GROSS CIRCULATION CONSIDERATIONS

Levels Desired/Required

The International African American Museum and its associated outdoor program are likely to occupy the full site within the constraints of access, circulation and exterior environment.

The size of the program needs on a limited site and the desire to have a more interesting volume than a “box on stilts,” means that the building will require three or more tall floors to fit the program. This verticality, while challenging circulation and building efficiency, allows for interesting atria, mezzanine overlooks and a rooftop with a view.

Because of floodplain restrictions, the first enclosable level needs to be lifted by a full story. This requirement creates an interesting outdoor space under the building, which will be used as a marketplace for community vendors. The “IAAM Marketplace” will allow open circulation into the building, through an escalator that will take visitors to the entrance lobby, while it also attracts pedestrians who are moving between the parking garage and the other activities at Liberty Square. IAAM might operate the food and gift carts directly, though this option is not covered in the operating budget, or it might select local vendors and receive rentals and commissions in return for licenses to operate on its site opening up onto Liberty Square.

The space under the building might permit a ritual space that is accessible 24/7 that has a connection to the building above and to the water beyond.

The rooftop will have impressive views looking out over Liberty Square to the National Park’s Services Fort Sumter Tour Boat Facility and out to the water beyond. Given Charleston’s year-long climate, both the Rooftop Garden and the IAAM Marketplace are opportunities for activities, function rentals, reunions and other community programs that many other museums cannot enjoy.

The resulting multi-level facility may offer multiple public entrances on various levels of the building at the street and from the parking garage to the rear of the site. The relationship between these entrances and the importance of an easily identified main entrance will need very careful study to insure operational functionality as well as the increased demands of security.

Pedestrian Access and Vehicular Parking Considerations

The main visitor drop-off area will accommodate both cars and buses carrying school groups and tourists. This area may require an entrance sequence into the building that is separate from that used by visitors arriving on foot from the parking garage behind. As the entrance lobby is one level up because of the floodplain issues, people coming from the parking garage might enter at a higher level, while pedestrians would come up an escalator. Ideally, these two entrances are brought together so that both groups may

benefit from a shared lobby experience that provides a single entrance experience for arriving guests and aids in general wayfinding.

The theater will need a separate entrance for performers, costumes, instruments and other hand-held items that is separate from the general public's areas.

A service area for light vehicle deliveries will be located out of sight, possibly utilizing a separate access, and providing temporary parking for small delivery vehicles.

The service area will also provide a loading dock for more substantial service and maintenance vehicles, accommodating full-size tractor-trailer trucks for traveling exhibit crates. Access to this area by large trucks will be easily negotiated and, if possible, hidden from all visitor entrances.

Some part of the service area may contain facilities that accommodate broadcast media vehicles (e.g., TV vans) and special event equipment (e.g.: special generators).

Many of the vendors in the IAAM Marketplace will be carts and vehicles, which need to arrive and depart from the site on a regular basis.

The road to the rear of the garage can be used for bus parking, and the rotation of buses from this area to the street level drop-off pickup point will need to be considered.

The Free Zone

For the IAAM visitor, the Free Zone offers amenities within a lobby that contains an information booth, ticketing counters, a membership booth and controlled-access gateways into the paid admission areas: the Exhibit Areas and the Theater Lobby. The Free Zone will also provide access to IAAM's Store and to the Gathering, all in the Free Zone.

The Free Zone may well include more than one level and may be developed in a variety of ways, offering, for example, a site for an overlook on an upper level that takes advantage of one or more views of the first floor of IAAM or the exterior program areas that surround it.

OVERALL DESIGN CRITERIA AND OPERATIONAL CHARACTERISTICS

Safety, Security, and Compliance

The physical safety of the public and staff in the building and surrounding exterior areas is a high priority. Both the reality and the perception of safety are critical to the public. To be successful, the site and building must be perceived as clean, healthy, safe, and secure during all open hours.

Full compliance with all applicable code and ADA requirements is assumed; pro-active measures such as universal design in these areas are encouraged.

Building Integrity

The basic performance of the building will meet high professional standards. The facilities will be:

Watertight: Roofs, windows, basements, canopies, and similar joints will not leak;

Operable: The building and site will be designed to minimize operating costs and to be energy-efficient; it will have sufficient practical amenities such as loading docks and freight elevators for its purposes; and

Maintainable: Windows, surfaces, lighting fixtures and similar building elements will be accessible, replaceable, and able to be adequately maintained.

These expectations may seem obvious. But it is instructive to note that a recent casual poll of executive directors of similar facilities revealed that half reported leaks in the facility roofs sufficiently serious to impact programming.

Net Program Spaces

The program spaces as specified in the architectural program provided by the planning team require 42,580 net square feet (NSF) – see Table 1 below. These net spaces constitute IAAM's fundamental expectations for its facility. The details of these expectations will be described in significant detail at a later point in the *Architectural Room Book* (see *Capital Phase Schedule and Organization*, PROJECT BENCHMARKS).

The first phase of the work of the architectural team will be an in-depth review of these expectations, with recommendations for the implementation of adequate support spaces, building systems, parking, vertical circulation, and other elements that together will determine the gross area of the entire building.

Imagery and Design Aesthetics

The IAAM will be a distinctive stand-alone building with integration of indoor and outdoor spaces. It will capitalize on attractive, fun, inviting, and appealing imagery, engaging a broad-based audience.

Imagery: The IAAM environment will not be neutral; instead it will be complex, layered, and full of encouragement to visit again. Every element of its complex physical characteristics should inspire the visitor to experience the programs it contains.

Marketing Appeal: The exterior appearance of the building will be dramatic, exciting, and fun; it will promise adventure inside. The space will be friendly yet sophisticated; it will be a provocatively designed, artistic expression of a way of thinking and feeling. The architecture and landscape design will express to visitors the appeal of the programs within, encouraging them to enter and participate. Various combinations over time of user-generated additions to the structure itself will influence the tone of the architecture: large banners, flags, graphics, and a variety of signs announcing changing programs and attractions. Even the activities of arriving visitors will affect how the general public perceives the building. One of the objectives of the IAAM marketplace is to provide a welcoming, accessible and friendly entrance that is full of activity.

Design Receptivity and Open Design Standards: The aesthetics of the building and site will be welcoming to the later addition of new elements in a diverse range of styles and fashions, such as children’s art and community sculptures.

Visual Expression: Although not a requirement, the visual expression of IAAM’s program components in the building’s massing, its skin or its internal layout may enhance both the overall institution and the visitor experience. IAAM’s exhibit and theater programs offer many concepts and metaphors that lend themselves to outward expression that would intrigue visitors.

Confirmation of Community: One of IAAM’s goals is the enrichment of the sense of community. Properly designed, IAAM will become a gathering place both inside and outside, and a source of community pride. Benches, water fountains, seating areas, shaded areas, and gardens can create restful areas for families that will encourage additional visits to the site again and again. The Rooftop Garden will play an important role in this respect and is another opportunity to tell the story from the visual landscape, offer opportunities for contemplation and host special events and community functions. The building as a whole can be used as a gathering place for celebrations and festivals that might use all of its levels in different ways.

Advance Organizing: The exterior environment — as well as aspects of the interior — must function as an “advance organizer,” educating visitors to a sense of their imminent experience by means of the nature of their approach to the building entrance and interior Free Zone. Efficient physical circulation spaces can be combined with attractive, intriguing program elements and selective information devices to help the visitor become more receptive to learning and discovery before entering the building or program zones.

Design for Learning

IAAM’s exhibit areas, theaters and themed program classrooms — collectively its learning spaces — will be designed as environments for learning. Different kinds of learning will happen in different kinds of architectural spaces. While exhibit and theater

designers will be handling some of this, the architect team is expected to provide learning spaces with character and built-in systems appropriate to each space's long-term needs. Exhibit spaces should be highly flexible, allowing IAAM to change and refresh learning environments periodically.

Design for the Visitors

The building and its exterior and interior spaces will be easy to use, easy to move through and comfortable for visitors and staff. Its rooms will function smoothly both as independent spaces and as an integrated whole with easily understood operational procedures. The design of the spaces will derive from their functions, and the design of the building will integrate these interrelationships of spaces with the spatial features of the site.

The design process will be a collaboration between the IAAM exhibit development team and the architectural team to create a facility that provides IAAM the resources it needs to produce and present top quality visitor experiences that integrate site, architecture, and program.

Some specific areas of functionality:

Operational Adjacencies: Program space adjacencies, layout and design — particularly in the Free Zone, service areas, theaters and galleries — will be driven by marketing and operational needs. These adjacencies will be suggested by the IAAM exhibit development team to the architectural team initially through adjacency diagrams included in the *Architectural Room Book* and developed collaboratively in the concept and schematic design phases of the building design. In addition, the spaces within the building will be:

- accessible to outdoor areas where possible in addition to the IAAM marketplace and the rooftop garden, enabling some programs to be both inside and outside.
- accessible to service, maintenance and deliveries.
- accessible (as appropriate) to catering support areas, if they are to be used as function rental spaces.
- convenient for moving large exhibits in and out.
- manageable from a security perspective.

Traffic Flow: The IAAM will handle large crowds without difficulty, yet not feel empty on a slow day because of the number of relatively small spaces, rather than vast lobbies and galleries. The design of the circulation will prevent long lines, intersecting traffic flows, and bottlenecks wherever possible by thinking through how the majority of visitors will move through the building in an architecturally

guided manner that allows visitors to see all major public spaces without requiring doubling back or congested intersections. Architects will pay particular attention to the emotional qualities of sequencing visitor encounters with the Gathering Space and the Family and Community Memory Wall.

Wayfinding: Clear signs and directions create the visitor's sense of orientation. These begin with exterior signs highly visible from the main approaches and continue with site and building entrances that are intuitive. Inside the facility's primary circulation patterns, visitors will always understand where they are and how to get back to the facility's principal landmarks.

Sensitivity to Visitors' Experiences: The circulation pattern will offer visitors a variety of architectural and aesthetic experiences along the way that contributes to the quality of their cumulative experience. No issues with rain should intrude from car/bus drop-off points and the lobby.

Acoustic Isolation and Control: In addition to a generally high level of acoustic isolation throughout the building, there is particular need for areas within the building that require "quiet" to be protected from those that are encouraged to be "loud." All interior spaces and activities need to be protected from all exterior noise that distracts from the visitor's experience.

Access: Control of access is important and is independent of a decision about the necessity of security guards at staff or delivery entrances. Given the elevation of the first indoor level because of the floodplain, and the need for entrances and vertical transportation from the street-level for different kinds of activities, access and universal design will be significant challenges. The control of access varies depending on the nature of the transition from space to space; a number of approaches may be used to control access:

- Outside to inside: Keys and alarms
- Large object (12' x 12' x 12') route: Staff present
- Free Zone to any paid program zone: Ticket collection point
- Food & garbage route to rental spaces and rooftop garden: Sealed off from collections
- Any public zone to any semi-public zone: Staff present
- Any public zone to any non-public zone: Staff keys by dept.
- Delivery area to inside: Intercom/buzzer
- Public elevator/escalator from Marketplace to lobby: Open during public hours
- Visitor elevator/escalator inside: In paid zone only

- Freight/staff elevator: Staff present (keyed)

Vehicle Access: School buses, delivery vans, special-needs vans, armored vehicles, tour buses, and limousines will be regular visitors, and provisions for sheltered drop-offs and loading docks are important.

Expandability

It is hard to say at this point when and for what purposes IAAM will wish to expand. This first phase of the project is intentionally as tight as possible in order to start the institution at sufficient size to be sustainable, while being realistic about the availability of capital financing.

It is highly likely that future expansion of exhibit space, program facilities, community event spaces, support for educational outreach and other programs and activities will require additional space and support areas. IAAM will benefit from addressing this likelihood in the building design process, identifying places where expansion is possible and providing the infrastructure to make those additions easier and more affordable to construct. A possibility might be to connect the Phase 1 building to the garage behind and expand within that structure, which suggests attention to the relative floor levels.

The *Architectural Room Book* will discuss the possible needs for expansion and the potential constraints on successful implementation.

Low Operating Costs:

The building and the outdoor Marketplace it sits on will be designed to minimize operating costs (utility, upkeep, janitorial, maintenance, bulb replacement, etc.) and to be energy efficient.

- HVAC: Proper, filtered air ventilation, even in crowded conditions, or on hot humid days, will be needed that is programmable and controllable in different zones for economy and multiple mode operations.
- Lighting: Low operating costs for electricity and lamp replacement; easy access to fixtures. No “hard-to-get” custom lamps.
- Windows: Cleanable and insulated.
- Exterior hardscape and landscape areas should be cleanable, safe and serviced with utilities to support Marketplace vendors economically. Surfaces should tolerate food and drink spillage.

Environmentally Sensitive Construction

Many new museums are now being built according to principles of sustainable environmental architecture, and IAAM will need to consider its position on this. The Leadership in Energy and Environmental Design System (LEEDS) has established a strict set of guidelines for environmental compliance and mitigation of impact, ranging from accommodation for bicycle traffic to on-site purification of drain water. Heating, cooling and material choices are important, as are construction methods and transportation sources. Some museums are targeting official LEEDS recognition; others are following their principles while not seeking an official point-driven evaluation. While visitors are just starting to understand what a LEEDS building is about, donors and public officials are increasingly expecting rigorous attention to the environmental aspects of cultural projects. If LEEDS recognition is pursued, the architect team must be selected with that capability in mind. (Or architects may add that capability to their team by bringing on one of the growing number of LEEDS consultants available).

Adaptability, Built-In Storage, Versatility, and Programmability

The IAAM will be designed to facilitate modifications and program changes, allowing it to evolve with new uses (and users) over time. Many of its spaces will be multi-functional, requiring easy and smooth transitions. Storage is a premium in museums, and in addition to the programmed storage spaces, the design will maximize storage with storage areas integrated into otherwise unusable spaces under counters and inside benches.

Utilities and services will be augmented throughout the building where possible with empty conduits, raceways, cable troughs, and other dedicated pathways for the future connection and service of new communications and information equipment. A crawl space and/or computer floors under exhibit galleries may be the best compromise of accessibility and cost.

The ability to control lighting, audio, and other systems will provide opportunity to change the feeling and use of a space very quickly and easily. In addition to centralized and/or automated control of the building systems, some areas — notably the more complex Exhibit Areas — will require control that is locally programmable to facilitate multiple operational modes.

Fixed Budget, Inclusive Scope

The program expects considerably more from the building than is normally expected from shopping malls, office buildings, and other programs where the fit-out is typically done by tenants. The *Architectural Room Book* will specify the character, partitions, utility distribution and built-in systems the Owner expects in each room as part of the base building budget. Lighting, IT wiring, floor loading, crawl spaces, utility connections and distribution, dimmable controls, vestibules and equipment storage areas are among

the kinds of specifications that will be included in the base building and described by the *Room Book*.

If any of these functional requirements are not yet designed at the time of a cost estimate, allowances should be included in the budgeting for their eventual inclusion.

Public Involvement:

“Open architecture” is a good description of the relationship between the architecture and its public. It welcomes and encourages public participation. Sections of the Marketplace, for example, could be paved with “glassphalt” manufactured from cullet made from glass bottles collected by local kids.

- **Community Gathering Place:** the Museum’s outdoor facilities — including the Marketplace’s “natural” arenas, stages, and other ceremonial spaces — should flow across the street into Liberty Square in order to support festivals, events and other community activities.
- **Community Expression Projects:** designated spaces and surfaces — both inside and outside the building — allow community groups to install quilts, murals, sculptures or structures of a temporary nature.

Selection of Architectural Team

The selection of the architectural team to design the IAAM building should be done by an architectural search committee formed by the IAAM board and including board members, community representatives, urban planners, museum staff, and other museum consultants. The process should be facilitated by someone familiar with architectural searches, such as the chairman of an architectural school.

There are two routes for selection: competition and interviews. Each has its pros and cons and it will be a critical early decision. Both processes start with portfolio, credentials and reference reviews to arrive at a short list of qualified candidates. Generally, the planning team recommends interviews from that point forward rather than competitions because the process of design should be collaborative between the program developers and the architectural team, designing from the inside functionality out. Regardless of how much importance the interior functionality is stressed in a competition’s guidelines, the rules do not allow competitors to collaborate with IAAM’s staff and program planners, and the selection committee is almost inevitably swayed by the external appearance of the competition entries more than by the architects’ sensitivity to the Museum’s program. By the time the selected designer is able to collaborate with the program developers, the ability to craft a meaningful and excellent visitor experience inside is usually compromised, sometimes inflicting permanent damage to operating efficiency and the visitor experience.

Still, at the head of Liberty Square in Charleston, and in particular with regard to the International African American Museum, the exterior appearance and iconic impact is important to get right, and an argument can be made for a competition that identifies the external image at the start and puts a premium on that image rather than on the architectural expertise to collaborate with program planners in producing an emotionally satisfying learning experience inside.

OUTLINE ARCHITECTURAL PROGRAM (PRELIMINARY)

CAUTION: This outline is in draft form for discussion purposes only. Architects have not reviewed it. We recommend that such a review happen early in the next phase of International African American Museum's planning and that these spaces and sizes be revised at that time.

The Outline Architectural Program is the most concise statement of the physical master plan for the new facility. It groups the required spaces by function and specifies both the area and the clear ceiling heights required for their proper functioning.

Also note that the specific names, titles, and/or topics assigned to the spaces below are placeholders for use until the exhibit design has been further developed. Specific room names have been expanded to allow easier identification when they are seen out of context.

Outline Architectural Program
 International African American Museum

Room Code	Space Name	Net Area	Gross Height	Cubic Volume
A Site Approach and Parking		2006		
A-10	Site Perimeter			
A-11	Highway and Downtown Signs	off-site		
A-12	Neighborhood Signs	off-site		
A-13	Perimeter Curb-cuts and Signs	street		
A-14	Sidewalk Systems	street		
A-20	Public Parking Garage	exists		
A-30	Building Service Entry Areas			
A-31	Building Service Entry Signs	outside		
A-32	Building Service Access Road	outside		
B Outdoor Facilities - Under the Elevated Building				
B-10	Street Level Marketplace & Festival Grounds extending Liberty Square			
B-11	Marketplace Grounds	outside		
B-13	Staging Area	outside		
B-14	Bike Racks, Furniture and Equip	outside		
B-15	Orientation Kiosks	outside		
C The Approach to the Building				
C-10	Exterior of Building			
C-11	Exterior Building and Site Signs			
C-12	Exterior Building Lighting			
C-20	Passenger Drop-Off			
C-21	Car Passenger Drop-off Area	outside		
C-22	Bus Passenger Drop-off Area	outside		
C-23	Drop-Off Waiting Structure	outside	12	
C-30	Exterior Entrance Area			
C-31	Pedestrian Entrance Concourse	outside	12	
C-32	Pedestrian Connector to Liberty Square	outside	12	
C-40	Building Service Entries			
C-41	Service Vehicle Approach	outside		

C-42	Exterior Loading Dock	in gross	16
C-43	Staff Service Entrance	in gross	12

Room Code	Space Name	Net Area	Gross Height	Cubic Volume
D The Entrance Areas				
D-10	General Public and Group Entrance (Street Level)			
D-12	Public Entrance Vestibule	200	12	2,400
D-13	Elevator/Escalator/Stairs Lobby	100	12	1,200
D-14	Information Counter	included		
D-20	Free Zone Lobby & Ticketing Area (Above Flood Level)			
D-21	Main Lobby	1,250	40	50,000
D-22	Entrance Icon Area	included		
D-23	Information Booth	included		
D-24	Group Orientation Space	included		
D-25	Ticket & Membership Areas	included		
D-26	Admissions Office & Cash Room	120	12	1,440
D-30	Free Zone Visitor Services			
D-31	Free Zone Public Lockers	100	12	1,200
D-32	Family Washroom/First Aid Room	100	12	1,200
D-33	Free Zone Washrooms	800	12	9,600
D-34	Free Zone Lobby Storage	85	12	1,020
D-40	The Gathering			
D-41	Family and Community Memory Wall	700	16	11,200
D-42	Community Icons	200	16	3,200
D-43	Partners' Showcase	400	16	6,400
D-44	Community Gallery	500	16	8,000
F-42	Equipment Storage	100	12	1,200
F-43	Catering Support and Production	200	12	2,400
D-45	Pathway of the People	in gross		
D-50	Gateways	in gross		
D-51	Gateway to Core, Changing Exhibits	in gross 16		
D-52	Gateway to Learning Center	in gross 16		
D-53	Gateway to Gift Shop	in gross 12		
Subtotal		4,855		100,460

Room Code	Space Name	Net Area	Gross Height	Cubic Volume
E The Gift Shop Areas				
E-10	Retail Areas			
E-11	Gift Shop Entry Area	1,300	12	15,600
E-12	Gift Shop Merchandise Area	included		
E-13	Gift Shop Check-out Area	included		
E-20	Offices			
E-21	Gift Shop Manager and Staff Office	200	12	2,400
E-30	Storage Areas			
E-31	Gift Shop Local Storage	200	12	2,400
E-32	Gift Shop Cart Storage	75	12	900
E-33	Secondary Gift Shop Storage	150	12	1,800
	Subtotal	1,925		23,100
F Rooftop Garden				
F-10	Rooftop Garden			
F-11	Canopied/Roofed area	outside	16	
F-12	Catering Support Shelter	outside	10	
	Subtotal	0		0
G The Exhibits Area				
G-10	Exhibit Pavilion Hub			
G-11	Exhibit Hub	1,000	27	27,000
G-13	Gateways to Core Exhibits	in gross		
G-15	Exhibit Zone Washrooms	300	12	3,600
G-20	Core Exhibits			
G-21	Core Exhibit Galleries	12,600	27	340,200
G-21.1	Africans Shape the Lowcountry	included		
G-21.2	Tales of an African City	included		
G-21.3	Defining Freedom by the Action	included		
G-22	Changing Exhibits (2 or 3 subdividable spaces)	7,500	27	202,500
	Subtotal	21,400		573,300

Room Code	Space Name	Net Area	Gross Height	Cubic Volume
H The Theater Area				
H-10	Lobby	in gross		
H-20	Theater Area			
H-21	Stage	750	40	30,000
H-22	Seating Area (125 - 150)	1,000	24	24,000
H-23	Control Booth	280	12	3,360
H-24	Storage	100	12	1,200
H-30	Theater Area Washrooms	250	12	3,000
		Subtotal	2,380	61,560
I Learning Center (Semi-Public)				
I-10	Group Lunch Room	500	16	8,000
I-11	Group Storage Room	75	9	675
I-30	Youth Curators' and Oral History Center	1,000	12	12,000
I-40	Community Mtg/Classrooms (3 Combinable)			
I-41	Meeting Room I	1,000	16	16,000
I-42	Meeting Room II	1,000	16	16,000
I-43	Meeting Room III	800	16	16,000
I-51	Resource Center	300	12	3,600
I-52	Education Offices	200	12	2,400
I-53	Demo Materials and Props Storage	160	16	2,560
		Subtotal	5,035	77,235

Room Code	Space Name	Net Area	Gross Height	Cubic Volume
J Program Support Areas				
J-10	Exhibit Support Spaces			
J-11	Graphics Workshop	250	12	3,000
J-12	Exhibits Workshop	750	12	9,000
J-13	Exhibit Crate & Other Storage	1,000	12	12,000
J-20	Theater Area Support Spaces			
J-21	Staff Greenroom	150	12	1,800
J-22	Theater Area Staff Washroom	50	12	600
J-23	Theater Equip. Room	145	12	1,740
J-30	Collections Management			
J-31	Collections Temporary Storage	500	17	8,500
J-32	Collection Handling Area	300	17	5,100
J-33	Collections Support	150	12	1,800
	Subtotal	3,295		43,540

K The Administrative Area

K-10	Entrance Area			
K-11	Staff Entrance from Lobby	in gross	12	
K-20	Office Landscape			
K-21	Office Entrance and Reception	75	12	900
K-22	Office Landscape	800	12	9,600
K-30	Enclosed Offices			
K-31	Director's Office	225	12	2,700
K-33	Development Director's Office	120	12	1,440
K-34	Administrative Director's Office	120	12	1,440
K-36	Visitor Program Director's Office	120	12	1,440
K-37	Training/Personnel Coordinator (2)	115	12	1,380
K-50	General Service Areas			
K-51	Board Room	400	12	4,800
K-52	Training Room & Lounge	250	12	3,000

Room Code	Space Name	Net Area	Gross Height	Cubic Volume
K-60	Office Support Spaces			
K-61	Mail, Equipment and Supply Room	150	12	1,800
	Office Equipment Area			0
	Office Supply Storage Area			0
K-62	Records Storage Room	75	12	900
K-64	Management Info. Services Office	150	12	1,800
	Subtotal	2,600		31,200
L Building Support Areas				
L-10	Building Support Spaces			
L-11	Janitorial & Facility Support	100	12	1,200
L-12	Staff Washrooms, Lockers & Shower	250	12	3,000
L-20	Building Administrative Spaces			
L-21	Maintenance Office Landscape	200	9	1,800
L-21.1	Technical Services Manager	inc. above	9	inc. above
L-21.2	Facilities Technicians	inc. above	9	inc. above
L-22	Building Operations Control Room	140	9	1,260
L-30	Loading Support Areas			
L-31	Garbage & Recycling Room	100	12	1,200
L-32	Security Entrance & Receiving Area	200	16	3,200
L-33	Receiving Area Storage	100	12	1,200
	Subtotal	1,090		12,860
Total Net Area		42,580	22	923,255
Gross Up (40%)		17,032		
Total Gross Area		59,612	22	1,292,557

Table 1
 Source: White Oak Associates, Inc.

ADDITIONAL DEFINING CHARACTERISTICS OF ALL EXHIBIT AREAS

The net area, while important in defining the particular spaces within IAAM, is only one of three important sets of descriptions for each space.

The second set describes each space in relation to the spaces that it “wants” to be close to – the adjacencies. Later in the project, the *Room Book* will approach adjacencies in two ways. First, it specifies in words all other areas whose proximity will benefit a particular space and categorizes them as either “critical” or “desired.” Second, the *Room Book* will include diagrams for service areas as well as the galleries covered earlier in this document. Those adjacency diagrams will show the relationships between groups of areas illustrated in a manner that is unfettered by the reality of real space.

The third set of defining characteristics includes the various physical elements that create the architectural character of each area. As introduced below for the learning spaces — and applied to many additional areas in greater detail in the *Room Book* — the function and impact of each space will be enhanced by the best choice of scale, natural light, exterior views, interior views, finishes, acoustic energy, and similar variables.

MAKING TRANSITIONS BETWEEN EXHIBIT AREAS

Nearly every exhibit area works best when it “tells one story at a time.” The story may have several self-standing “chapters” — possibly even many — but they all work together to form a coherent whole.

It is important, however, to also see these stories in real time and three-dimensional space as the visitor experiences them sequentially one at a time. The transition from one experience to the next requires careful consideration on a more global level that individual exhibit designers can usually manage.

The architecture can initiate this thinking about the transitions from one exhibit experience to the next by providing some of the following:

- A clear definition of the physical elements inherent in each exhibit space
- Clear definitions of the transitions between exhibit areas
- A variety of design styles or languages

- The establishment of a strong physical point of view of particular areas — especially as the visitor approaches and enters them
- A variety of architectural “postures” within the exhibit areas, some areas bold and aggressive, other areas quiet, perhaps even inconspicuous
- Sequences of smaller interpretive areas or clusters, creating larger, richer, and more mysterious ones
- Juxtapositions of small areas and large areas to keep each a “fresh” experience
- A choreography of space that is larger than the “footprint” of the visitor’s path
- “Penetrations” of space that offer the visitor a glimpse of what is to come
- “Echoes” of space that reminds visitors of where they have already been

The three core exhibition galleries can have quite distinctive architectural qualities. “Africans Shape the Lowcountry” calls for a broad, horizontal landscape, evenly and brightly lit. “Tales of an African City” might be a maze of angular, disjunctive spaces, masked from one another, some brilliantly lit and others in deep shadow, high and broad in some spaces and low and narrow in others. “Defining Freedom by Their Action” is a more abstract landscape, an alternation of higher, lighter spaces where visitors can scan an issue with other, more immersive, problematic areas where they can re-enact the challenges facing African Americans in South Carolina as they moved from emancipation to freedom.

Discussions of the best ways to coordinate the building design’s contribution to the visitor’s experience need to recognize that the exhibit design process generally comes later in the overall building process. This likely reality should not, however, blind either design team to the many opportunities for truly collaborative design.

INVENTORY OF PRINCIPAL IAAM SUPPORT SYSTEMS

In addition to the conventional building-oriented systems within any large facility, IAAM will require many specialized systems and equipment to support its objectives and methodologies. The following inventory is an overview of the types of systems that require integration into a successfully functioning IAAM.

This list is intended to cover those equipment systems and fixtures that are needed to run the museum, but are not included in the “normal” resources provided by the building, program and exhibit budgets. For example, all safety and security systems, fire and sprinkler alarms, acoustical treatments, code graphics, elevators and escalators and other built-in systems will be part of the building budget. The exhibit and theater budgets will cover their audio/visual and media support, information networks, lighting, graphics, control systems, and other program-specific systems.

An outline inventory of probable support systems and equipment is sketched below; the categories are listed alphabetically. All will be described in much greater detail in IAAM's *Architectural Room Book* at a later point in the planning process.

Acoustic and Ambient Light Control

- Acoustic absorption and/or diffusion materials
- Sound- and light-locked entrances to the theater and some specialized exhibit areas
- Window blinds, films, and/or curtains
- Glare-reduction materials and devices

Function Equipment

- Function catering equipment
- Function furniture: tables and chairs
- Function A/V: portable sound and projection systems
- Environment and lighting

Cash Handling and Security Systems

- Surveillance System
- Cash room equipment
- Cash registers (if not integrated into the ticketing system)
- Safe/drop box

Data and Information Systems

- Information technology backbone: the primary delivery systems for all data and information
- Computer networks: servers, routers, firewalls, Internet access, electronic messaging etc.
- Communication LANs as required within departments, between staff and exhibits, and between visitor amenities and tracking systems

- Control LANs as required for building, administrative, theater, and exhibit operation
- Connection to the external world: phone, Internet, cable, satellite, wireless, etc.

Distance Learning Systems

- Network connection and maintenance
- Video recording, editing, and reproduction system
- Broadcast and reception system(s)
- Audio/video archiving system

Electrical Systems

- Building-wide electrical control system
- Theater lighting dimming systems: to control lighting and effects in the theater and to create cue sequences for shows and demonstrations
- UPS (uninterrupted power supply) — to maintain operation of systems long enough to power down data and control systems; may be applied to specific equipment and/or entire systems
- Power conditioning — to guarantee electrical voltage at $\pm 5\%$ of nominal voltage to insure the health of computer and data systems
- Higher voltage/multiple phase power: as required to service systems in the exhibit and theater areas
- Emergency power system for sustained power outages

Emergency Systems

- No-light emergency exit signs: to prevent light leakage from exit signs in dark spaces, theaters
- Magnetic-release doors for fire emergencies in areas where open corridors or spaces are desired

Exhibit and Demonstration Support Systems

- Water supply: hot and/or cold water may be required in established exhibit locations as well as in the Learning Center

- Drainage: for sinks, water supply locations and exhibit support
- Compressed air: Required in the exhibit maintenance shop, the theater, and throughout the exhibit galleries
- Natural gas and vent hoods: may be required in some demonstration areas (e.g., cooking class)
- Lighting: exhibit lighting infrastructure for positioning, powering, and controlling all aspects of the exhibit lighting system
- Exhibit “Out of Order” signage system

Furniture Systems

- Outdoor casual seating
- Indoor casual seating
- Theater seating
- Movable exhibit seating
- Movable office furniture

Graphics and Signs

- Corporate identity system
- Institution logo and style sheet
- Integrated visual reference system (graphic)
- Exterior signs
- Interior signs
 - Directional signs
 - Location signs
 - Donor recognition
 - Code signs
- LED signs and systems
- Sign generating system
- Imagery acquisition protocol and equipment

HVAC Systems (Heating, Ventilation and Air Conditioning)

- Local control will be desired in some areas.
- Relative humidity: some collections areas, projectors and computer equipment will require very specific levels within narrow tolerances in especially wet or dry seasons

Lighting Systems — Special

- Building-wide lighting control system
- Work lighting: separate work lights will be required in some spaces for flexible set-up procedures and maintenance of specialized equipment
- Task lighting: some areas will require very specific task lighting to achieve an effective ambiance within a space

Maintenance Systems

- Janitor closets
- Floor cleaning systems
- Personnel and equipment lifts

Management Systems

- Office support and data access (word processing, database, spreadsheet, etc.)
- Telephone system
- Ticketing and admissions (see also “Ticketing System”)
- Finance system
- Membership/development support systems
- Facility use scheduling system
- Program Registration

Media Systems Independent of Exhibit and Theater Programs

- Multi-mode media systems
- Digital media interfaces and conversion systems

- Audio announcement and music system (analog and digital)
- Video monitor network
- Integrated visual reference system (electronic)
- Audiovisual support equipment
- Wall clocks

Retail Shop Equipment

- Cash register units
- Other shop equipment
- Retail fixtures and environment
- Carts for outdoor sales

Office Systems

- Office landscape systems
- Acoustic privacy systems (“white noise” and similar technologies)
- Telephone systems
- Printing system
- Fax system
- Duplicating systems
- Image manipulation systems
- Teleconferencing systems

Outreach Systems

- Teacher Resource system
- Kit distribution system
- Outreach transportation system

Signal Systems

- Raceways, cable-trays, trenches, etc.: Open and accessible routes for frequent additions and changes in the signal lines that control exhibit and theater systems
- Power separation: Special precautions will be required to keep power and signal lines separate; this is particularly important for audio and data cables

Ticketing System

- Point-of-sale ticketing system
- Web ticket sales
- Telemarketing sales and reservations
- Program reservations

Visitor Service Equipment

- Information booth equipment
- Membership booth equipment
- Box office equipment
- Cash room equipment
- Crowd handling equipment and turnstiles
- First-aid room equipment
- Staff communications systems
- Public telephone system
- Audio announcement and music system
- Audiovisual support equipment

Web Systems

- Remote information access
- Remote ticketing
- Remote scheduling and reservations
- Remote teacher resource system

Part III, Chapter 2: Capital Phase Schedule and Budget

The common advice from directors who have been through opening a museum is “Don’t design for opening day.” Design, instead, for a viable and sustainable operating institution that will play a central role in the community and its learning infrastructure for years to come. Changing programming that is up-to-date and connected to community issues is fundamental to this operating vitality.

While IAAM must tell its story well through exhibits and films, it is an even greater challenge to launch a sustainable institution with diversified business and support revenues by providing residents, schools, and tourists with learning services that meet their needs.

In conceptualizing and scaling the planning, care should be given not to over-extend the institution at opening, taking on just that critical mass needed for a successful operation. At each step along the way, particularly the early phases, cost and value engineering should be applied to all plans. Every capital decision is also an operating decision.

Implementation will be organized into a series of phases in order to allow the Board and its advisors to manage the project and keep track of time and resources. The phase schedule (see Table 1) is based on the experience of similar projects in other cities.

IAAM’s Board and fund raising campaign may take more time to develop clear directions and reach fund raising benchmarks than the time architects, exhibit designers, film producers, and the general contractor have been given in Table 1 to spend the money raised.

PHASES & SCHEDULE

The *phase schedule* developed in the next table provides a framework for the museum’s implementation.

Critical Path Phases
 International African American Museum

	PHASE	DURATION
1	Strategic Planning Report	Complete
2	Campaign Research & Plan	3 Months
3	Organization & Lead Funding	Varies
4	Exhibit Development	3 Months
5	Operating Business Plan	4 Months
6	Pre-Design Architectural Program	2 Months
7	Schematic Design	3 Months
8	Design Development	4 Months
9	Construction Documents	5 Months
10	Construction Phase Investments	Varies
11	Construction Bids & Awards	2 Months
	Groundbreaking	Benchmark
12	Construction	18 Months
13a	Installation	4 Months
13b	Shakedown	1 Month
13c	Previews	10 Days
	Public Launch	
	Operations	Ongoing
14	Summative Evaluation	4 Months

Table 1
 Source: White Oak Associates, Inc.

DETAIL ON NEAR-TERM PHASES: PHASES 2-5

The following next steps take the project up to the start of the architect’s work. They are chronological as to starting each step; as duration times vary, some may be still running while others start. No step should be authorized until sufficient cash flow is available and is then sequestered to finish that step.

- **Identify Sufficient Short-Term Funding** to authorize work in Phase 2, Campaign Research and Plan, and Phase 3, Organization and Lead Funding
- **Retain Fundraising Counsel** to advise the campaign.
- **Retain a Public Relations Firm** to help with the campaign phase (from now to ground-breaking) of IAAM’s public communications.
- **Continue a Quiet Communications Campaign** to inform regional leadership that this project is moving forward with strength and vision.

- **Attract the Support of Charleston's** key leaders to the project. (ongoing)
- **Capital Fundraising Feasibility Report** Once the Board and the Fundraising Counsel decide that enough support and awareness has been achieved, then a campaign study should be commissioned based on this Strategic Planning Report to see if its capital budget is achievable and to involve potential supporters in evaluating options. Part of that process is to translate/excerpt the Strategic Planning Report into a Case Statement.
- **Prepare the Board** for the development process. This may involve trustee training through such processes as the Carver method of board policy governance and the establishment of appropriate subcommittees that can supervise site and architecture, program development, collections policy, the capital fundraising campaign, financial overview, and other aspects of planning.
- **Revisit Governance Structure:** As new partners come into the project, the make-up and governance of IAAM should be reviewed by legal counsel to accommodate the project and include new funding partners and content providers like the school system and other major donors and supporters.
- **Institutional Partnership Framework:** Determine a process and structure for partnerships and affiliations between the institution and its community and investment partners. A number of categories at different levels of commitment will help the Board set policy about establishing letters of support, standing agreements, memorandums of understanding, etc. with institutional affiliate partners and donors.
- **A Schedule of Investment or Naming Opportunities** needs to be developed that links the program concepts with benefit packages and price tags for potential sponsors. IAAM's leaders, working with campaign counsel, can identify and price the major program components that might lend themselves to naming opportunities.
- **Secure Pledge Commitments and Public Funds** equal to at least half the campaign. Identifying ongoing support revenues needs to be addressed at the same time as the capital funds are raised. Secure cash flow for Phases 4 and 5.
- **Capital Budget Cash Flow:** Define parameters and cash flow for the pre-opening capital budget, the inflows of pledges and public funds, and other finance and proposal requests.
- **Hire the Museum Director and Initial Support Staff:** Hiring experienced museum staff that can maximize contributed and earned revenue sources will be important. Hiring "business minded" staff that can create and implement more detailed business plans will be important to the success of the museum as well.
- **Visitor Concept Research:** Quantitative and qualitative visitor research should be conducted both in Charleston and in other cities in the region to assess levels of

interest in the concepts. Important aspects of this research will include regional perceptions of the new International African American Museum, positioning IAAM as a regional museum, proposed themes for the exhibit galleries, approaches to lifelong learning, and regional perceptions.

- **Select the Exhibit Design Team:** Once funds are identified for exhibit design, then the Exhibit Development Team can be started. Given that the exhibit galleries are defined, sized, and budgeted, then exhibit, theatre, and program designers can be selected to continue working on the exhibit design. The selected team needs to include first-hand knowledge and expertise of African and African American history within South Carolina as well as expertise in designing engaging, popular museum exhibits.
- **Exhibit Development:** The Exhibit Development Team will take the planning to date in this document, the results of the visitor research and the direction from the Board, based on their community discussions, to develop an *Exhibit Master Plan*. The results of this plan will inform the choice of architect and the *Architectural Room Book*.
- **Start Architectural Search Process:** Once funding has been identified for the architectural design process, prepare a scope for architectural services and circulate it to a short list of qualified museum architects. A Selection Committee should evaluate the responses, interview a number of finalists, visit their buildings, talk to their previous clients, understand the business offer and make a selection. There are consultants specializing in advising architectural search processes.
- **Commission a Comprehensive *Operating Business Plan*** that integrates the results from other studies completed for IAAM and includes the new ideas from project supporters. The *Operating Business Plan* will be an evolved and more detailed version of the Strategic Planning Report. For instance, detailed line-item departmental budgets will be calculated from the bottom up, based on a full staffing list and a new organization chart and assumptions about the number of curators, educators, etc. Early in the process, a workshop of museum experts should be held to review plans and assumptions to date and to recommend directions to pursue.
- **Create the *Architectural Room Book***, which is the Owners' direction to the architect about what should be in each space. This document, also known as the architectural program, will establish physical characteristics, support systems, and architectural characteristics for each space in the project's outline architectural program. Naturally, the document will evolve as the design and contracting proceed.
- **Select the Architect and Negotiate a Contract** and authorize them to proceed on their first two phases: Pre-Design Architectural Program Review and Schematic Design.

CAPITAL AND PRE-OPENING OPERATING COSTS

Overview of the Capital Budget

It is important to recognize that the capital budget is a strategic allocation of funds, and not a specific estimate of expenses in each area. Nothing is designed yet, so nothing can be priced, and the overarching management task is to get everyone to design and fabricate within budget.

All expenses incurred prior to opening have to fit into one or more of the existing line items. If new categories of expenses are created, then other existing line items must be reduced, as the total capital budget should not be increased without Board approval.

From a management viewpoint, this means that each line item needs to carry all costs associated with that area in the broadest definition possible. For instance, if \$70,000 is allocated for a system, this does not mean that IAAM should look for a system with that price tag; rather, the budget needs to cover the cost of a system consultant who might write a Request for Proposal, expenses associated with staff visiting other facilities that may have candidate systems installed, change orders to the building cabinetry in order to accommodate the selected system, delivery installation, and travel costs, staff training, and other related expenses, in addition to the system itself, which might end up costing only half the originally budgeted sum. Unless the capital budget provides otherwise, any category of expense should include its design, contractors, installation, contingency, and all other associated expenses, and in several instances a share of the visitor research and evaluation.

A corollary to this inclusive coverage will be the dawning realization by managers and designers that the budgets are already tight even though the budget seemed initially a generous figure.

Having stressed the inclusive nature of each line item, it is also important to emphasize the need for flexibility in managing the capital budget. Areas of the capital budget will be delegated to key team members to manage, and they should have the flexibility to adjust assignments and categories within their sub-totals. The capital budget has been organized according to a number of management responsibilities, with the key premise that the designer or manager in charge has to operate within a fixed budget. Budget accountability will reside with IAAM's Board and Finance Committee but responsibility for staying in budgets will be assigned to "Task Managers" for each row in the capital budget.

Capital Budget: 2006\$
 International African American Museum

	FN	Unit Cost	Amount	Area Total	Dept. Total
BUILDING CONTRACT					
Construction Costs: Base Building	1	\$365	59,612	\$21,758,380	

Parking (garage exists)			by others	
Site Remediation			by others	
Building Allowances			included	
Change Orders			included	
Ground Level Marketplace Amenities			\$250,000	
Site Demolition and Preparation			included	
Abutting Site Preparation			by others	
Roof Garden			\$150,000	
Soil Removal & Disposal			included	
Signs & Graphics			included	
Equipment Systems	1		included	
Lighting (except theatres and exhibit halls)			included	
Catering Equip (built-in only)			included	
Building Security Equip.			included	
Building Audio System			included	
SUBTOTAL BUILDING	32%	\$372		\$22,158,380
BUILDING ASSOCIATED				
Land	1		\$0	
Relocation			\$50,000	
Design & Engineering		12.50%	\$2,769,798	
Reimbursable Exps		1.00%	\$221,584	
Consultants		1.50%	\$332,376	
Construction Support		3.00%	\$664,751	
Museum Program Interface Specs.		1.00%	\$221,584	
Fees, Permits, Taxes & Titles			\$50,000	
Inspections			\$50,000	
Site Survey and Other Studies			\$50,000	
Test Borings			\$7,500	
Engineering & Environment			\$30,000	
Environmental Impact			\$110,000	
Appraisals & Review			\$10,000	
Legal and Accounting			\$50,000	
Insurance			\$60,000	
Contingency on Bldg Contract		10.00%	\$2,215,838	
SUBTOTAL ASSOC.	10%	31.11%		\$6,893,430

Table 3 (Part 1 of 4)

Source: White Oak Associates, Inc.

Capital Budget: 2006\$					
International African American Museum					
	FN	Unit Cost	Amount	Area Total	Dept. Total
MUSEUM EQUIPMENT (non-exhibit)					
Furniture & Fixtures			\$150,000		
MIS Network			\$200,000		
State-wide Education Network & Equip			\$120,000		
Other Office Systems			\$75,000		
Telephone System			\$150,000		
Visitor Service Equip.			\$25,000		
Ticketing & Visitor Information System			\$175,000		
Audiovisual Systems			\$100,000		
Security & Cash Handling			\$40,000		
Bldg Maintenance Equip.			\$40,000		
Storage Units/Shelving/Cages			\$15,000		
Grounds Maintenance Equip.			\$15,000		
Museum Van			\$40,000		
Interior Signs			\$150,000		
Uniforms & Badges			\$20,000		
Museum Store					
Retail Equipment			\$35,000		
Moveable Cart for Marketplace			\$15,000		
Decor & Environ			\$70,000		
Initial Logo Stock			\$50,000		
Special Event Catering Equip			\$50,000		
SUBTOTAL EQUIP		2%		\$1,535,000	

Table 3 (Part 2 of 4)

Source: White Oak Associates, Inc.

Capital Budget: 2006\$

International African American Museum

	FN	Unit Cost	Amount	Area Total	Dept. Total
PROGRAM COSTS					
Visitor Research and Evaluation				\$100,000	
Content Research and Label Copy				\$175,000	
Installation Expenses				\$75,000	
Travel & Expenses				\$150,000	
Management & Coordination				\$300,000	
Owner Furnished Items				\$125,000	
Exhibit Hub				\$375,000	
Core Exhibits: Long-term Infrastructure	2	\$200	12,600	\$2,520,000	
Core Exhibits: Opening Installations	2	\$175	12,600	\$2,205,000	
Core Exhibits: Second Installations	2	\$175	12,600	\$2,205,000	
Temporary Exhibitions: Infrastructure		\$15	7,500	\$112,500	
Temporary Exhibitions: Flexible Wall System (e.g. Milawall)				\$75,000	
Temporary Exhibitions: First Year Rentals and Costs				\$275,000	
The Gathering: Family History Ctr & Exhibits				\$750,000	
Exterior Marketplace Exhibits				\$150,000	
Rooftop Garden Exhibits				\$150,000	
Exhibit Lighting				\$350,000	
Learning Center					
Group Lunch Room				\$50,000	
Themed Meeting Spaces		3	\$125,000	\$375,000	
Resource Center				\$40,000	
Young Curators' and Oral History Center				\$200,000	
Initial Program Develop. & Materials				\$100,000	
Exh & Program Tools/Maint Equip					
Exhibit Shop				\$125,000	
AV & Electronic Shop				\$50,000	
Print & Graphics Workshop				\$80,000	
Maint Equip (fork lifts, etc)				\$75,000	
Theatre					
Projection, Sound and Lighting System				\$450,000	
Screen				\$150,000	
Seating		150	\$300	\$45,000	
Furnishings & Supplies				\$50,000	
Goods/Services/Other				\$150,000	
Initial Film (1 @ 20 min +/-)				\$3,000,000	
Other Initial Theatre Programming				\$150,000	
Web Site Development				\$100,000	
In-Gallery Promotional Facilities				\$150,000	
SUBTOTAL PROGRAM	22%				\$15,432,500
SUBTOTAL CAPITAL COSTS					\$46,019,310

Table 3 (Part 3 of 4),

Source: White Oak Associates, Inc.

Capital Budget: 2006\$					
International African American Museum					
	FN	Unit Cost	Amount	Area Total	Dept. Total
PROJECT MANAGEMENT					
Organizational Costs				\$50,000	
Pre-Opening Operat'g Supp't	3			\$3,250,000	
Capital Campaign Costs	4	1%	70,000,000	\$700,000	
Marketing Launch Costs	5			\$500,000	
Pledge Payment Bridging Interest Costs				\$250,000	
Moving & Set-up				\$50,000	
Planning Fees & Studies (includes work to date)				\$600,000	
SUBTOTAL MGMT.	8%				\$5,400,000
SUBTOT CAPITAL & PROJ MGT COSTS					\$51,419,310
MUSEUM FUNDS					
Escalation Reserve for Inflation		2.5 yrs.	3%/yr	\$3,949,697	
First Yrs of Operating Support		2	70%	\$3,640,000	
Endowment	6			\$10,000,000	
Operating Cash Reserve		10%	\$2,600,000	\$260,000	
SUBTOTAL FUNDS	26%				\$17,849,697
TOTAL	100%				\$69,269,007

Table 3 (Part 4 of 4)
 Source: White Oak Associates, Inc.

Summary Capital Budget: 2006\$	
International African American Museum	
Building Contract	\$22,158,380
Building Associated	\$6,893,430
Museum Equipment	\$1,535,000
Indoor Program Costs	\$15,432,500
Project Management	\$5,400,000
Museum Funds	\$17,849,697
TOTAL	\$69,269,007

Table 2
 Source: White Oak Associates, Inc.

Notes to Capital Budget

The capital budget as presented here is the planning team's recommendation for the minimum that should be spent in order to create a world-class facility of sufficient scale to achieve the operational objectives. If the capital budget is reduced, operating revenues are also likely to be reduced.

Not everyone will regard all items in the budget as "capital" expenses, in the strict definition of the term. Some categories include pre-opening operating expenses and ongoing cash and endowment funds. However, the total budget attempts to be an estimate of all the expenses needed before opening day, when the operating budgets take over.

1. Many parts of the budget assume some level of **donated services and equipment**. When donations are received, their value should not be deducted from these figures, but added to both the campaign total and to the appropriate budget. The museum's concept depends on donations of hardware. The planning team has no good information on what might be donated and what might have to be purchased, but we are assuming that most demonstration technology and student resources will be donated. If this assumption proves false, then the budget should be increased accordingly, or the program plan revised to use less sophisticated techniques.

2. Experience platforms and initial core exhibits are separately budgeted to reflect the principles of a **"Delta," or a flexible museum**. The allocations for experience platforms should be invested by IAAM in long-term infrastructure including exhibit cases, equipment, mezzanines, thematic environment, and other aspects of creating a Delta gallery. The initial core exhibits, on the other hand, should be commissioned from exhibit designers to play on the experience platforms with the assumption that they will be replaced by a second scenario at some point in the future, leaving the base experience platform intact. The separation between these two layers should be managed carefully, as designers of the opening experiences are likely to blur the line in the pressure to get something opened with a limited budget.

This budget is inclusive of all design fees, fabrication, contingencies, and installation, but not of the museum staff salaries and related expenses, which are covered under pre-opening costs.

3. **Notes to Pre-Opening Operating Costs:** During the capital phase, funds will be needed to cover planning and production staff, the marketing launch, campaign expenses, general operations, and moving costs.

This budget addresses staff and expenses needed to plan and launch the museum during the years prior to public opening, when the operating budgets should take effect. This category addresses the routine needs of a growing team assembled to create the visitor's experience, such as a newsletter, membership drive, informational package, on-going PR campaign, training, and community outreach programs, etc. It does not address the incremental costs or revenues, however, that might be associated with delivering

educational services prior to opening, such as teacher development and school outreach programs, etc. The planning team believes that IAAM should actively pursue such pre-opening educational programs, but they are not included in this budget because we feel they should be developed by staff as they are brought on board as a way of training them in the development of future educational programs once the museum is open.

4. Fund Raising: Expenses normally associated with running significant capital campaigns such as fund raising materials, videos, publications, preparation of grant proposals, maintenance of extensive donor data files, negotiating and contractual expenses, donor recognition events, promotion, and stewardship are here estimated at the low end of the normal range. The strategy is for the Board, staff, and government leaders to raise the capital personally among a close community of funders rather than from a wide group of contributors.

5. Marketing: Principal marketing expenses will be associated with the launch and the campaign to announce the project broadly in the region through paid advertising, promotions, public relations, collateral preparation and distribution, and numerous other communications techniques to be detailed in the Marketing Plan. Funds in the early years will cover the visitor/market research into content, style, and approach that is needed to guide the exhibit and program plan and other operations choices. Funds two to three years before opening are for the Marketing Plan and the start of the Corporate Identity System. These funds should result in a name, a logo, subhead, and artwork for new letterhead, press release paper, and several other near-term collateral materials. If this task is done poorly or unprofessionally, the entire image of the museum will be compromised from the start.

6. Endowment has been calculated so that at a 5% draw down, the fund should be able to cover 19% of the operating budget.

Part IV, Chapter 1: Market Assessment

METHODOLOGY

This section aims to assess the market for the proposed International African American Museum and to define the size of the market population. Areas reviewed include resident demographic data, school enrollment, and tourism. At the end of this chapter there is a table summarizing the opportunities and challenges of the market.

The market segments include four groups: The Primary and Secondary Resident Market, the regional city or Tertiary Market, school children, and overnight tourists. The Primary Market is Charleston's Metro Area, which includes three counties, and the Secondary Market includes the three additional counties that comprise Charleston's Designated Market Area or DMA (the reach of a network television station).

Obviously, only a fraction of all persons available in any market will actually visit the museum in a given year. A museum's ability to stimulate visits from a market segment is known as "market penetration" or "capture." The likelihood of penetrating a market varies with the segment in question. For example, persons vacationing in an area are more likely to visit a museum than those coming for business. Studies have also shown that people with higher than average incomes and education are more inclined to visit a museum. The attendance potential estimated for IAAM, which appears in the following chapter, is based on the analysis of the market segments, attendance at attractions in the Charleston area, and the planning team's knowledge of museums. The end result is the sum of persons likely to attend from all market segments.

Population and demographic statistics were provided by various years of the resource book, *Demographics USA County Edition*. Their data and projections are based on the 2000 census. In 2003, the planning team met with various community and municipal organizations to learn about the character of the city as well as past and future trends. Those interviews, combined with data collected from the meetings and from other sources, formed the basis of the market assessment.

THE MARKET ENVIRONMENT

Development Trends in Charleston

The lower end of the peninsula has always been a big draw for tourists, but the upper part of the peninsula is continuing to develop. The South Carolina Aquarium and the Imax® Theater have enlivened the area around Liberty Square and already draw many tourists and residents. The National Park Service's Fort Sumter Education Center is also a big attraction and is adjacent to the aquarium and across the street from the planned IAAM site.

In addition, the upper King Street area, location of the Charleston Visitor Center and the Children's Museum of the Lowcountry, has been revitalized and more development is in progress. Utility lines will soon be relocated underground to make the area more visually appealing. Several new restaurants and many new shops have opened. The area is now informally known as the Design District, as many home furnishing and antique stores, have opened up. The former municipal building that housed the Chamber of Commerce is now a law school. Two new hotels are expected to be built in the area, one a Hilton. The Ritz Carlton chain may also open a hotel in Charleston. Two theaters, the Charleston Music Hall and the Music Farm, are still active, although the Music Hall is more sporadic. One was renovated several years ago for several million dollars and retrofitted as a commercial movie theater, including stadium seating and a high-end sound system. Unfortunately, the commercial movies did not flourish and they have stopped showing movies but it is still being used as a theater for plays and other events.

The Children's Museum of the Lowcountry opened in the West Shed of the Camden Towers in 2003 and has been a huge success. There is talk of more development of the sheds that might include outdoor display of ironwork sculpture by Philip Simmons, the well-known African American sculptor. The South Carolina National Heritage Corridor has discussed sponsoring a kiosk in the area. This would be a perfect tie in with IAAM. Possibly, in the future, IAAM should take on that role and house the Heritage Corridor kiosk at the museum.

Development is also happening in the northern part of Charleston, known as "the neck." A public transportation system is being created that will link the airport to Charleston. All of this points to positive growth and vibrancy.

The Need for the International African American Museum

In November 2003, members of the planning team conducted market research meetings to collect data, opinions, and suggestions from representatives of area organizations.³ The planners included the same two questions at each meeting: What are the needs of the Charleston area? And how can the proposed International African American Museum

³ Those interviewed included representatives of: the Urban League, the *Post and Courier*, the South Carolina Aquarium, the AME Church, the Charleston County School System, Charleston Metro Chamber of Commerce, WCSC-TV Channel 5, the Department of Economic Development, MOJA, and the legal profession.

address those needs? Below are some of the comments we collected. Some of the comments are clearly subjective and personal opinions of individuals, but that does not detract from their reflection of individual perspectives. Some of the comments conflict with others, representing differing views among different people. Virtually all respondents agreed that race relations and the cultural divide are significant issues in the Charleston area. The International African American Museum has great potential to offer a place of pride, heritage and culture for African Americans and to serve as a neutral meeting place for debates, forums, and other community events.

The comments below, collected as part of the interviews, are only one small part of a planning process for IAAM that has included many, many community meetings and meetings with individuals. This is an ongoing process. Dialogue with the community and individuals will continue throughout the planning process.

A Cultural Divide and Area Needs

- “There is a shortage of African Americans in visible roles in the Charleston area.”
- “There is a continuing need for quality education; addressing economic disparity is another critical need.”
- “Just about everything in Charleston has a race issue to it.”
- “There is no economic support in the black community.”
- “Blacks are the ‘Hidden Community’ in Charleston. They don’t go to restaurants in Charleston. There are no nice jazz clubs and nowhere to socialize.”
- “There is a ‘conspiracy of silence.’ So many people owned slaves. Charleston became even more segregated in 1968.”
- “Racism is deeply embedded in South Carolina. Alabama had some of the worst stuff happen, but this may have had a cathartic affect, as the situation there is better now than it is here. In South Carolina, on the other hand, there has been a polite accommodation — more like a century and a half of cease-fire.”
- “There has been no public discussions on race relations and people are impatient.”
- “Race relations in the Charleston area have not seen any major improvement in the past five years and may actually have worsened. Charleston has some of the worst race relations in the state. There is the mentality among some that ‘things will never change.’ There are feelings of unhappiness and frustration, anger and apathy. There is a brain drain among the more educated and young African Americans who leave for D.C., Atlanta, and other areas.”
- “The Peninsula, with approximately 25,000 residents in the zip code of 29403, includes families and children with some of the greatest needs. There is high poverty and related to this are poor test scores in the school system.”

- “There is a misconception about Charleston throughout the area. People still glamorize the plantation life. There has also been no progress in the last five years. Only three percent of households make \$100,000 or more in the metro area. Half of households make less than \$25,000. Young people are leaving the area.”
- “No one can believe that this museum will happen in Charleston.”

Area Schoolchildren and IAAM

- “Schools/students should be free. Elementary to 5th grade and 8th grade maybe.”
- “With the school dropout rate as high as it is, it would be a Godsend if the museum could help in some way.”
- “Truancy, dropouts, and on-time graduates continue to be issues. Dropouts are mostly at the ninth grade level, although legally truancy is up to 17 years old.”
- “The museum should be construed to help all students.”
- “The messages we should get to kids is the importance of education, self-esteem, don’t give up, how to find people who can help, and role models of local African American males who have made significant contributions. Coaching and mentorship is what research says works best.”
- “A project-based teen workshop would be a good idea as this is a very creative community that might get into designing exhibits and other museum work.”
- “The truth needs to be told. We should tell the kids at around the fourth-grade level about slavery. Parents need guidance about how to tell the story and to use the large number of old people in the process. The curriculum can’t cover the waterfront and when history gets to the Civil War it is important for parents to augment that with personal stories. It’s an emotional piece.”

Potential Roles for the Museum and Other Considerations

- “No one is telling the African American history story. It needs to be told.”
- “Some may say we don’t need another museum in Charleston, but this is the place to have it with Sullivan’s Island as the gateway. Everyone (of the African American community) has roots in Charleston.”
- “The core experience should be for adults. If they don’t know the story they can’t teach it.”
- “The museum should be for both blacks and whites. The whites shouldn’t be made to feel like they are being blamed. There should be programming for black and white kids together. Not just focus on blacks.”
- “The IAAM project is not widely known in the African American community. African Americans don’t want to relive that dark period of slavery. These are reminders of our past, a plantation mentality when African Americans were not in a position of power. The idea that a museum might happen before the community

deals with more critical issues seemed hypocritical. Can a museum repair some of the challenges? There has been no discussion of race relations; no dialogue.

- Do blacks want to share “their” African American history with whites”?
- “Full acknowledgment of the history is another important need that the museum can address. We need balance in the nature of the story. At the moment you hear cooking, dance, nice folks. Not enough emphasis on the hard stories and significant accomplishments. Story of Africa and the tradesmen are important. The museum has to be entertaining and inspire a feeling of pride in black Americans.”
- “The museum should address: why it happened, how we got over it, and who we are today.”
- “Genealogy could be an important part of the museum.”
- “Oral history is important – living history. Have a studio set-up to collect oral histories before some of the key people are gone: Jim Clyburn; Richard Fields, the Sea Island people.”
- “The museum might be a stepping off point for other African American sites; in addition to history, there are also religious sites in the area.”
- “The museum might be a good gathering spot for out-of-town visitors; the locals don’t go to that site. Perhaps that might be reversed as they would like to see a place downtown that is comfortable and welcoming to African Americans, particularly as many African Americans were displaced from that and other downtown locations.”
- “We should develop programs with an awareness of the patterns of cultural use. We should match activities in the community such as the conventions at the AME and other faiths, Black History Month, and the MOJA Festival. Current gathering places include churches, the Greeks (fraternity and sorority alumni reunions), and the Masons and Eastern Star.”
- “The museum needs to have open public forums that give people an opportunity to vent. At the moment, the meetings have had too much structure. Giving voices a chance to be heard and letting people know that their thoughts have been registered is part of the buy in.”
- “The content of the museum should not be turned over to (only) local voices, as it would be too much ‘Charleston is the center of the universe’. This is an international story.”
- “How to get Blacks to become members of the museum is the toughest question you’ve asked. It is not an easy process as it depends on building long term loyalty, seeing your friends and colleagues there, and hosting community debates, forums, and mass meetings such as the churches do to build trust.”
- “The museum needs to be authentic. It needs to do two things: It should serve all the needs of a contemporary cultural center, but it should also nod to a traditional museum, with its sense of awe and sacred spaces.”
- “The museum might also address the lack of neutral meeting spaces.”

- One person’s “ideal” museum was described as follows:
 - “Show that Africans came from a stable culture with history, faith, and skills; they were not clubbed from trees.”
 - “Tell the story of slavery”
 - “Show the achievements of reconstruction”
 - “Tell the ongoing efforts of civil rights”
 - “Have the same effect as the Birmingham Civil Rights Institute: Ticked off at first blush, then triumphant and uplifted at the end.”
 - “Show that the region had an appreciable number of free blacks. Urban slaves become the original middle class, but the Sea Islands had the worst of slavery, and this dichotomy persists.”
- “The museum should survey African American households.”
- “There are organizations to target like sororities and Links — though the latter is aging with young people leaving and no one to replace membership.”
- “The way to get African Americans involved is through a grassroots marketing campaign. I don’t mean ads and press releases, but rather speakers’ bureaus to churches and other forums to develop a sense of trust.”
- “There is a market for social functions, but the corporate sector for business meetings is slow. Conventions have been doing more on-site and so are also harder to attract.”
- “The museum should have a very large endowment. \$20 - \$50 million. Raise it through a national effort.”
- “Two-tiered ticketing should be considered with resident tickets less expensive than tourist tickets.”
- “People must be able to afford to come in. And the store should have affordable items.” An example was cited of families going to Disney on Ice and not having any funds to buy something for their children as all the items cost \$20 or more.
- “The aquarium is an issue because they charge way too much for local people. It is important to keep IAAM affordable. The area around it is nice and the National Park Service does well, so it should be a good site for the museum. People are interested in history, as is seen by interest in Fort Sumter.”
- “The museum will have to be free and should be for education purposes. And since kids (students) don’t have transportation, some must be provided. There will have to be corporate money to support all of this. Some corporations in the area have been targeted as not providing enough support funding. Start to hold people accountable.”

Tourism and Attractions

- “When African American tourists ask what restaurants or bed and breakfasts are welcoming to them, there are very few, and some of them are struggling.”

- “The African American perception of tourists is of white folk trying to get back into the Confederacy. There are some who refer to the area south of Calhoun as Honky Town.”
- “How to get support of the African American community is the million-dollar question. Some educated African Americans use museums regularly, but many are not familiar with museums.”

Other Factors

- “There has been an influx of newcomers to the Tri-County region in the last five to seven years, especially in the 16 zip-code areas. Approximately 20% of the Tri County population has been there for five years or less. This results in changes in the community, but facilitating change is very difficult in a tradition-bound community like Charleston. The newcomers are coming from urban areas.”

Education and Children

The public school system in Charleston County has a mixed reputation. The schools are county-funded at different levels and the state makes up the difference. There has been a heavy emphasis on the basics (reading, math, and science) and the ability to test well in standardized tests because of the very low test scores in the Trident area. 1997 results for composite SAT scores ranked South Carolina last in the country (out of the 23 states and the District of Columbia that primarily use the test.). 2004 data indicated that South Carolina was still ranked last. The school year runs approximately 180 days per year from mid-August to early June.

Children and education appear to be hot topics for the media and for non-profit organizations like the United Way and are an important focus for the city. The Mayor instituted a department entitled Mayor’s Office for Children, Youth and Families. It has a mentoring program being implemented through the schools and civic clubs, and IAAM could partner in this area, acting as a hub and possible meeting place for linking up African American mentors and children.

The South Carolina Kids Count report, that is updated annually, looks at family life, drug and alcohol abuse, child abuse and neglect, and other areas of children’s lives. In 2005 South Carolina ranked 45th of 50 states in overall ranking. In at least three report years (1996, 2002 and 2005), the Kids Count summary findings for children in Charleston, Berkeley and Dorchester Counties, included the following statement.

The data on families, economic status, health, readiness, school achievement, and adolescent risk behaviors provide a troublesome picture of the condition of children in the county.

In addition, the 2005 South Carolina Kids Count website stated the following in regard to the need for parents, government and the community to all work together to help the children of the state.

Parents exercising their responsibilities to and making sacrifices for their children are essential to avoiding most of the problems described in this report. The efforts of families must be supported by community partners such as schools, religious congregations, businesses, and youth-serving organizations. Communities must provide for learning, set good examples, organize positive recreational activities, and develop recognized roles for young people. Thus strong, loving families, in partnership with supportive communities, must provide the solutions to the many difficulties experienced by so many children in our state. Government must be an effective partner, making its greatest contribution through reinforcing the role of families and communities, and by supporting services necessary for good health, learning, and preparation for adult responsibilities.

Children in the Trident area need as much support and resources as they can get. IAAM can play a major role by providing programs for children, their caretakers, and teachers.

Table 2 shows summary data and trends from the Kids County Report, for 1980, 1990, and the most recent year for which data are available. The trends indicate that the percent of children in grade 3 with math and reading scores below standards has increased. The trends regarding “Not Ready for Grade One” are mixed. Berkeley’s state ranking out of 46 counties has improved. Dorchester’s has declined and Charleston’s is essentially the same. On the other hand, the proportion of “not ready” in each county has declined significantly. Note that the report presents data broken down by whites and “African Americans and others,” with the statistics being far worse for the “African American and other” group. Table 1 indicates that a large percentage of students are not graduating from school.

Selected Statistics by County for Children
International African American Museum

2005 Report	Charleston	Berkeley	Dorchester
In Single-Parent Homes White ('00)	19%	21%	20%
In Single-Parent Homes AA&O ('00)	58%	40%	44%
Living in Poverty	23%	16%	12%
Not Graduating from School	44%	34%	35%

Table 1

Sources: Kids Count 2005 and White Oak Associates, Inc.

Selected Educational Statistics by County for Children
 International African American Museum

	Recent Year	NUMBER			PERCENT			RANK OUT OF 46 COUNTIES		
		1980	1990	Recent Date	1980	1990	Recent Date	1980	1990	Recent Date
Not Ready for Grade 1	2001									
Charleston		1,196	1,348	505	36%	30%	16%	19	33	32
Berkeley		606	627	244	37%	25%	12%	22	19	15
Dorchester		342	403	205	32%	27%	16%	10	23	29
Repeating Grades 1 - 3	2000									
Charleston		972	1,173	623	29%	28%	17%	40	40	30
Berkeley		200	344	339	12%	14%	16%	5	8	28
Dorchester		315	245	70	30%	17%	5%	42	18	2
Grade 3 Math below Standards *	2002									
Charleston		1,147	609	930	34%	16%	30%	10	27	21
Berkeley		618	316	554	35%	14%	30%	13	19	23
Dorchester		323	192	260	33%	15%	20%	8	22	3
Grade 3 Reading below Standards *	2002									
Charleston		963	375	667	28%	10%	21%	11	13	13
Berkeley		481	225	357	27%	10%	20%	9	12	9
Dorchester		211	108	231	22%	8%	18%	3	10	4
Bottom Quartile Standford/MAT Grade 4	1998									
Charleston		546	1,072	924	20%	30%	26%	5	13	22
Berkeley		493	617	491	28%	29%	26%	16	11	20
Dorchester		174	323	373	18%	25%	26%	2	6	19

Table 2

Sources: Kids Count 2003 and White Oak Associates, Inc.

Note that for ranking, 1 is the best and 46 the worst (* BSAP for 1980 and 1990, PACT for 2002)

Tourism

Tourism continues to be big business for the Charleston area and contributes significantly to the economy. The Center for Business Research of Charleston’s Metro Chamber of Commerce has conducted visitor research studies for many years. In recent years, there have been some modest changes in the profile of the visitor. The percent of visitors traveling with children appears to have increased somewhat. Based on a 1999 Attraction Visitor Profile Study⁴ only an estimated 16% of the visitors traveled with children (an average of two children). The median party size was 2 and the average 2.92. A more recent visitor inquiry⁵ study, conducted in 2004, indicated that the median party size was still two but the average size had increased to 3.14. This means that half the respondents were traveling in a group of more than two people and half with fewer than two people, although it does not specifically indicate whether the other people are children or not. The 1999 survey indicated that approximately 40% of visitors stopped at the Charleston Visitor Center.

⁴ Center for Business Research, Charleston Metro Chamber of Commerce. Survey sites included Boone Hall, Charleston Museum, Drayton Hall, Ft. Moultrie, Joseph Manigault House, Magnolia Plantation and Gardens, Middleton, Nathaniel Russell House, Patriots Point, Fort Sumter, and Waterfront Park.

⁵ Center for Business Research, Charleston Metro Chamber of Commerce. *2004 Charleston, South Carolina Area Visitor Inquiry Survey Results*. Email and mail survey with 3,143 completed questionnaires with a margin of error of less than two percent.

The demographic profile of the visitors has not changed that much. Visitors are relatively well educated and have above average incomes, both characteristics of museumgoers. More people are staying in hotels/motels and more of the visitors come from outside of South Carolina. The 2004 survey indicated only 6.5% were from South Carolina and the 1999 survey indicated 18%. Even more visitors (59% versus 43%) have visited before and slightly more people are arriving by plane and slightly less by car. Between the 1999 survey and the 2004 survey visitors from North Carolina increased by 4%, those from Georgia decreased 2%, and those from within South Carolina decreased significantly, from 18% to 7%. International tourism is relatively small, 3-4% of visitors. International and national tourism is limited by the lack of a major airline hub anywhere in the state.

Although tourism has remained generally strong that did not translate into higher attendance at area attractions, as noted by an excerpt from an article in the *Post and Courier* from February 2004. Many visitors to Charleston have been to the area before, so changing programming will be important to lure tourists back.

4.6 million visitors spent \$5.1 billion, but hotels, attractions still struggled: The Charleston area hosted more visitors last year than in 2002, but that didn't translate into higher hotel room rates, nor did it offset a slump at attractions. A record 4.6 million visitors — including tourists, business travelers and military personnel — came to Charleston last year, compared with 4.3 million in 2002, a nearly 7 percent increase, according to year-end figures just released by the Metro Charleston Chamber of Commerce's Center for Business Research. Attendance at the 16 area attractions that the research center tracks fell by 9.8 percent from 2002. Traffic at area visitor centers was essentially flat at 1.06 million. (Kyle Stock, "Charleston Sets Tourism Record in 2003," *Post and Courier*, February 21, 2004.)

Data were not available as to what proportion of visitors were of African American heritage. Everyone agrees that only a minority of the tourists are black. The aquarium estimated that its audience was over 90% white. Charleston may not be uppermost on the minds of African Americans when planning a vacation, but IAAM can play a significant role in attracting African Americans tourists. The area is already top of mind for visiting historic attractions. Nationwide, heritage tourism is one of the areas of tourism that has seen strong growth and is continuing to grow.

Below are tables comparing the results of the two visitor studies cited above. The studies are not identical and are somewhat "apples to oranges." The 1999 study was conducted at area attractions and museums. The 2004 survey was conducted via email and mail.

Primary Purpose of Trip

International African American Museum

Primary Purpose	2004	1999
Just to Enjoy the Area	n/av	37%
Vacation	70%	21%
Visit Historic Attractions	n/av	17%
Visit Friends and Relatives	6%	12%
Satisfaction Rating	99%	100%

Table 3

Sources: 1999 Attractions Results Visitor Profile,
2004 Charleston, South Carolina Area Visitor Inquiry Results and White Oak Associates, Inc.

Places Visited

(Places in italics are free)

International African American Museum

Places Visited	2004	1999
<i>City Market</i>		54%
Historic Houses	53%	
<i>Downtown Historic Plantation</i>		44%
Plantation	39%	
Magnolia Plantation		24%
Boone Hall		23%
Museums	36%	
Charleston Museum		21%
Forts	36%	27%
Patriot's Point (Naval & Maritime Museum)	26%	24%
<i>Other (Market Area, downtown, beach, shop)</i>	22%	
SC Aquarium	22%	
<i>County Parks/Waterfront Parks</i>	17%	35%
Charles Towne Landing	17%	
Imax	8%	n/ap

Table 4

Sources: 1999 Attractions Results Visitor Profile,
 2004 Charleston, South Carolina Area Visitor Inquiry Results and White Oak Associates, Inc.

Accommodation

International African American Museum

Accommodations	2004	1999
Hotel/Motel	55%	44%
Resort or Beach house/condo	12%	13%
Inn or B & B	11%	11%
Other (includes time sharing)	9%	4%
Daytrip	6%	8%
Relative	5%	12%
Balance/Other	3%	7%
TOTAL	100%	100%

Table 5

Source: White Oak Associates, Inc.

Location of Lodging

International African American Museum

Where in Charleston was your lodging?	1999
Downtown	30%
North Charleston	11%
Mt. Pleasant	11%
Day Trip	11%
Charleston/West Ashley	9%
Other	28%
	100%

Table 6

Sources: 1999 Attractions Results Visitor Profile and White Oak Associates, Inc.

Residence of Visitors

International African American Museum

Residence	2004	1999
North Carolina	12%	8%
Georgia	7%	9%
South Carolina	7%	18%
Ohio	6%	4%
TN, NY, FL, PA, VA (4-5% each)	23%	23%
Texas	4%	2%
Other US States	39%	32%
Other Countries	4%	3%
	100.0%	100%

Table 7

Sources: 1999 Attractions Results Visitor Profile,
 2004 Charleston, South Carolina Area Visitor Inquiry Results and White Oak Associates, Inc.

Other Visitor Statistics
International African American Museum

Miscellaneous	2004	1999
Median # of Nights	3.00	3.00
Average # Nights	3.08	3.5
Median Party Size	2.00	2.00
Average Party Size	3.14	2.92
Average # Attractions Visited /Party	4.3	
Married/Living with Partner	80%	78%
Age 35-49	33%	33%
Age 50-64	42%	33%
Visited Before	59%	43%
First Time Visitor	41%	57%
Arrived by Car	56%	61%
Arrived by Rental Car	n/av	10%
Arrived by Plane	23%	18%

Table 8

Sources: 1999 Attractions Results Visitor Profile,
2004 Charleston, South Carolina Area Visitor Inquiry Results and White Oak Associates, Inc.

Heritage Trails in South Carolina

There are several Heritage Trails in South Carolina that offer a wonderful opportunity for linking with IAAM. IAAM could be one of the sites on some of these trails and also a gateway to the trails. The trails are part of the South Carolina National Heritage Corridor. As described on their website:

“The South Carolina National Heritage Corridor extends 240 miles across South Carolina, stretching from the mountains of Oconee County, along the Savannah River, to the port city of Charleston. The 14 counties of the corridor offer a cross-section of the state’s history, culture, and natural landscapes. The area describes the evolution of upcountry and lowcountry life, from grand plantations and simple farms to mill villages and urban centers, and how their history affected South Carolina as a state and America as a nation.”

Within the South Carolina Heritage Corridor, there are also African American trails — the Coastal Trail and the Folkways and Communities Trail— that cover the counties of Charleston, Colleton and Dorchester. The trails highlight the folkways, culture and achievements of Africans and African Americans in these counties. The two trails follow the Discovery and Nature Routes of the South Carolina National Heritage Corridor.

As part of the South Carolina Heritage Corridor there is a website called the SCIway (South Carolina Information Highway) which is a resource for African American Culture and Heritage. There are web links to items in the following categories:

- South Carolina Black Festivals and Events, including the MOJA Arts Festival in Charleston
- South Carolina Gullah Heritage
- South Carolina Black Music and Dance
- South Carolina Black Arts and Crafts
- South Carolina Black churches and cemeteries
- South Carolina African American cuisine

Charleston has its own black heritage site (www.charlestonblackheritage.com) that promotes black heritage tourism to the Lowcountry region and positions Charleston and the Lowcountry as the “roots of the African American experience” in America.

The historical significance of the port of Charleston as an entry point to North America for African Americans makes this a potentially major heritage destination for all black Americans, just as Ellis Island is an important site for the descendants of 19th- and 20th-century immigrants. (Of course, the analogy is inexact since Africans did not emigrate voluntarily.) There are also at least several other Charleston area sites that were very important during the Civil Rights Movement, including the tobacco factory on East Bay Street and the Moving Star Hall on Johns Island.

A new initiative, based on a study by the National Park Service, is the preservation of the Lowcountry Gullah-Geechee Culture of South Carolina, North Carolina and Georgia, through a national heritage area and a museum. The Gullah-Geechee Cultural Heritage Act was introduced to Congress last year and if it is passed IAAM should investigate whether there is a potential partnership that would link the two organizations and/or whether IAAM might be the official museum site in South Carolina.

Travel Trends for African Americans

According to the Travel Industry Association’s website, African American travel volume is up four percent from 2000 to 2002 (increasing from 72.2 million to 75.2 million person-trips), higher than the two percent increase for travelers overall during the same time period. A majority of African American person-trips are for leisure (74%), most often to visit friends or relatives (44%). One in five (22%) African American person-trips are taken for business, including combined business and pleasure purposes. Florida, North Carolina, and Georgia are the most popular Southern destinations. Virginia and Texas are also popular destinations. (It is impossible to gauge the impact of the NAACP’s economic boycott of the state, in effect since 2000.) Group tours are popular among African Americans. Compared to travelers overall, nearly three times as many

African American person-trips involve group tours (10% vs. 3%). African American households spend \$428 per trip, on average, excluding spending on transportation to their destination. (Source: The Minority Traveler, 2003 Edition) (Source: Travel Industry of Association Website - www.tia.org/pressmedia/domestic_a_to_z.html, accessed 2/16/06)

MARKET SEGMENTS

In this section population and demographic data are presented by market segment.

1. Primary Market Residents (Also known as the Metropolitan or Metro Area):

Refers to persons living in the following three counties. (Also known as Trident or Tri-county area.)

- Berkeley
- Charleston
- Dorchester

2. Secondary Market Residents (Counties in the Designated Market Area⁶ and Beyond the Metro Area): Refers to persons living in the three counties in the DMA that are in addition to the three Metro Counties.

- Colleton
- Georgetown
- Williamsburg

3. Tertiary Market Residents: Refers to persons living in the metro areas of the following three cities.

- Columbia's metropolitan area
- Savannah, Georgia's metropolitan area
- Augusta, Georgia's metropolitan area

4. Schools: Includes school-aged children aged 5 to 17 in the six counties in the DMA plus those in the tertiary market.

5. Tourists: Includes visitors from outside the Primary, Secondary and Tertiary Markets who stay overnight in the Charleston area.

⁶ The Designated Market Area is essentially the reach of a network TV station and is a definition of the A.C. Nielsen Company.

Please note that children will attend the museum with friends and family as well as with school groups, so no double count is involved when allocating children to both resident and school market segment tabulations.

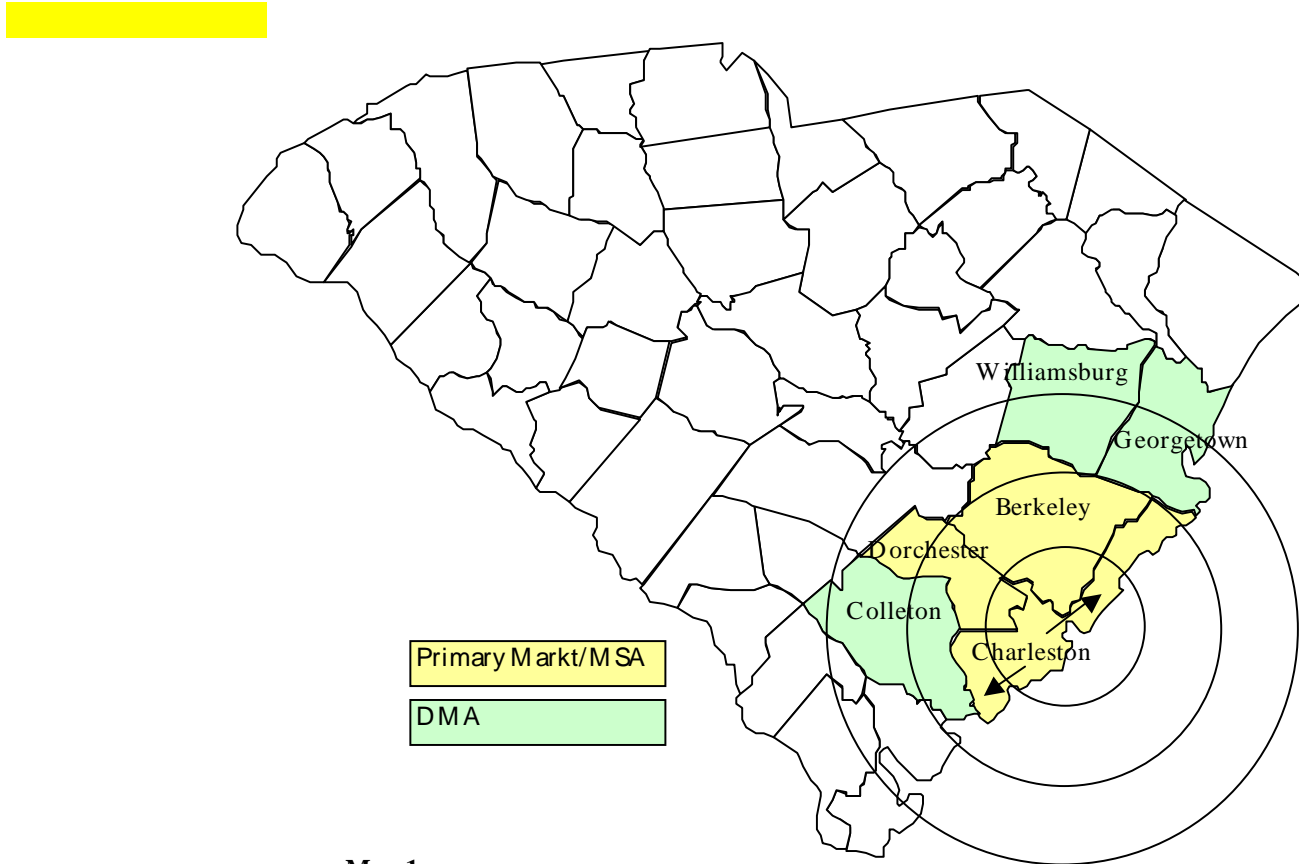
Also note that the market segments defined above do not mean that all visitors will come from these segments. There will be day-trippers from area towns and cities from counties not defined above that will also visit. Defining market segments aligns with how one's marketing and advertising dollars will be spent. Residents within metro areas can be reached through newspapers and area magazines and radio. Counties in the designated market areas can be reached through television. Reaching towns, cities and counties that are outside of one's metro area or DMA, such as Beaufort and Orangeburg, requires additional advertising and marketing dollars with separate campaigns reaching fewer residents.

The maps on the following pages show the areas covered by the primary and secondary resident market segments and the major highways surrounding Charleston, as well as the location of the tertiary market cities.

Map of the Primary and Secondary Markets (20, 40 and 60 Mile Radiuses)

International African American Museum

Note that the DMA actually includes the MSA counties, shading shows the additional counties in the DMA



Map 1

Sources: *Mapland USA* and White Oak Associates, Inc.

Regional Map with 30, 60, 90 and 120-Mile Radiuses
International African American Museum



Map 2

Sources: *Street Atlas USA* and *White Oak Associates, Inc.*

PRIMARY AND SECONDARY RESIDENT MARKETS

The Primary Market is the Metro Statistical Area (Metro Area or MSA) for Charleston, which includes the counties of Charleston, Berkeley and Dorchester. Charleston's Designated Market Area, or DMA (also the Secondary Market for this report), includes an additional three counties, Colleton, Georgetown, and Williamsburg.

Population projections indicated in this report are based on data from *Demographics USA County Edition 2005*.

The Primary Market: Population Size, Race and Ethnicity

Total 2005 population for the Primary Market, Charleston's Metro Area, was 583,700. Charleston County is the largest with a 2005 population of 327,100. All counties are experiencing growth, and population increases through 2010 are expected to add another 37,000 residents. The strongest growth is projected for Charleston County with an expected increase of 18,300 residents.

There has been an influx of newcomers to the Tri County region in the last five to seven years. Approximately 20% of the Tri County population has been there for five years or less.

The Primary Market is very diverse, far more so than the U.S. as a whole. The African American population is especially strong, with Charleston's 2005 Metro Area black population comprising 31.7% of the population or almost 178,000 people. In Charleston County 34.8% are black, approximately 114,000 people. The U.S. data nationwide for 2005 indicated a black population of 12.4%. Out of 300 U.S. Metro Areas, the Charleston MSA ranks 36th in the number of black residents but 84th in total population. Berkeley County is 24.2% black and Dorchester 26.0% black. The percentage of the population of Asian/Pacific Islander race or Hispanic heritage is significantly lower than the U.S. averages.

The Primary Market: Income

The metro area, as a whole, has a median effective buying income (EBI) index of 96 versus the U.S. index of 100. The metro area's per capita, average household, and median household incomes are all slightly below the U.S. averages and data. Of the three counties, Dorchester is wealthier with an overall EBI index of 104 versus 97 for Berkeley and 93 for Charleston County. Income distribution by household is similar to the U.S. averages, although Charleston County has 32% of households with EBIs of less than \$25,000 and the U.S. overall is at 29%. Visitor surveys at museums have indicated that a large percentage of their audiences have household incomes of \$50,000 or more.

The Secondary Market: Population Size, Race and Ethnicity

Total 2005 population for the three counties in the Secondary Market was only 135,400. Georgetown County is the largest with a 2005 population of 60,300, with the other two counties having populations between 35,000 and 40,000. Georgetown has the highest projected population growth through 2010. Williamsburg is expected to decline in population. Overall growth through 2010 is projected to be only an additional 4,600 residents.

The Secondary Market has an extremely large percentage of the population that is African American. The black population constitutes almost 67% of the County of Williamsburg, or 23,750 residents. Colleton is 42% black and Georgetown is 37% black. All much higher percentages than the U.S. average of 12.4%. The total for the three counties is approximately 62,000 African American residents.

The Secondary Market: Income

The income statistics for the three counties in the Secondary Market are extremely low, especially in the County of Williamsburg, which has a median EBI of 63 versus the U.S. index of 100. Colleton is at 74 and Georgetown at 88. The per capita, average and median household incomes for Colleton and Williamsburg are all significantly below the overall U.S. data.

Statistics for the Primary and Secondary Markets

Population of the Primary and Secondary Markets

International African American Museum

Market	Pop. 2005	Projected 2010	% Change 05 - '10	# Change 05 - '10	# HH's 2005	Persons/ HH '05
Metro Area (MSA)						
Berkeley	148,400	154,700	4.2%	6,300	53,300	2.68
Charleston	327,100	345,400	5.6%	18,300	133,100	2.37
Dorchester	108,200	120,700	11.6%	12,500	39,700	2.67
TOTAL MSA	583,700	620,700	6.3%	37,000	226,100	2.50
DMA (less MSA)						
Colleton	39,600	41,100	3.8%	1,500	15,300	2.56
Georgetown	60,300	65,100	8.0%	4,800	24,100	2.48
Williamsburg	35,500	33,800	-4.8%	-1,700	13,500	2.61
DMA (No Metro)	135,400	140,000	3.4%	4,600	52,900	N/AV
TOTAL DMA w. Metro	719,100	760,700	5.8%	41,600	279,000	2.50
U.S. AVG			4.9%			2.59

Table 9

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

Primary and Secondary Markets Race and Ethnicity
 International African American Museum

	WHITE	BLACK	ASIAN/ PAC ISL	HISPANIC ORIGIN
Metro Area (MSA)				
Berkeley	65.0%	24.2%	1.2%	8.0%
Charleston	60.9%	34.8%	1.5%	2.5%
Dorchester	69.7%	26.0%	1.3%	2.2%
TOTAL MSA	63.6%	31.7%	1.7%	2.4%
DMA (less MSA)				
Colleton	56.3%	41.5%	0.3%	1.8%
Georgetown	61.3%	36.6%	0.6%	1.9%
Williamsburg	32.1%	66.9%	0.2%	0.8%
TOTAL DMA w. Metro	61.5%	34.4%	1.4%	2.3%
U.S. AVG	73.6%	12.4%	4.3%	14.2%
	WHITE	BLACK	ASIAN/ PAC ISL	HISPANIC ORIGIN
Metro Area (MSA)				
Berkeley	96,460	35,913	1,781	11,872
Charleston	199,204	113,831	4,907	8,178
Dorchester	75,415	28,132	1,407	2,380
TOTAL MSA	371,079	177,876	8,094	22,430
DMA (less MSA)				
Colleton	22,295	16,434	119	713
Georgetown	36,964	22,070	362	1,146
Williamsburg	11,396	23,750	71	284
DMA (less MSA)	70,654	62,253	552	2,143
TOTAL DMA w. Metro	442,247	247,370	10,067	16,539

Table 10

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

Primary and Secondary Market Effective Buying Household Income by Income Range
 International African American Museum

	Less than \$25,000	\$25,000 - \$49,999	\$50,000 or more	TOTAL
Berkeley	28%	40%	32%	100%
Charleston	32%	34%	34%	100%
Dorchester	26%	38%	36%	100%
MSA	30%	36%	34%	100%
Colleton	43%	37%	20%	100%
Georgetown	34%	36%	30%	100%
Williamsburg	51%	32%	17%	100%
DMA with Metro	41%	35%	24%	100%
U.S. AVG	29%	35%	37%	100%

Table 11

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

Primary and Secondary Market Income Summaries
 International African American Museum

	Per Capita	Median HH	AVR HH	Median EBI Index
Metro Area (MSA)				
Berkeley	\$15,418	\$38,299	\$42,930	97
Charleston	\$19,954	\$36,444	\$49,043	93
Dorchester	\$17,164	\$40,863	\$46,772	104
Metro Area (MSA)	\$18,284	\$37,765	\$47,204	96
DMA (less MSA)				
Colleton	\$13,472	\$28,922	\$34,833	74
Georgetown	\$18,436	\$34,635	\$46,197	88
Williamsburg	\$11,975	\$24,593	\$31,577	63
DMA including Metro	\$17,720	\$36,279	\$45,684	92
U.S. AVG	\$19,289	\$39,324	\$51,284	100

Table 12

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

TERTIARY MARKET (REGIONAL CITIES)

The Tertiary Market includes the metropolitan areas for the cities of Columbia, SC, Augusta, GA and Savannah, GA. These are the three major cities in the Charleston region. The cities are two to three hours in drive time from Charleston and residents visiting from these cities are thought of as day trippers, as opposed to tourists who are overnight visitors or coming from out of state.

Driving Distance from Charleston
International African American Museum

	Driving Distance from Charleston	Estimated Driving Time from Charleston
Savannah	111 miles	2:14
Columbia	114 miles	1:55
Augusta	184 miles	2:59

Table 13

Sources: *Mapquest* and White Oak Associates, Inc.

The Tertiary Market: Population Size, Race and Ethnicity

Total 2005 population for the Metro Areas for the three cities was 1.5 million, a significant potential market for IAAM. Columbia is the largest, with a population of 684,000 and Savannah the smallest, with a population of 309,000. All three Metro Areas are expected to increase in population at least through 2010, with a projected increase of 74,400 residents. Projected population growth is especially strong for Columbia, with an additional 38,700 residents expected by 2010.

Like the Primary and Secondary Markets, these cities are diverse and have a significant black population, with a combined 2005 black population of just over 520,000, significantly larger than the combined Primary and Secondary Markets.

The Tertiary Market: Income

The income indices for each of the three Metro Areas are all 89 or above, versus the U.S. index of 100. Columbia is the wealthiest, with an index of 97, followed by Savannah with an index of 94 and Augusta at 89. Each of the Metro Areas has per capita, median, and average household incomes less than the overall U.S. data. Augusta and Savannah, at 34% and 33% respectively, have a higher than average percentage of households that have EBIs of less than \$25,000. The U.S. average is 29%.

Population of the Tertiary Market
 International African American Museum

Regional Cities	% Change 90-'00	Pop. 2005	Projected 2010	% Change 05 - '10	# Change 05 - '10	# HH's 2005	Persons/ HH '05
Columbia, SC	14.3%	683,300	722,000	5.7%	38,700	263,400	2.47
Augusta, GA	11.1%	517,900	536,600	3.6%	18,700	193,600	2.59
Savannah, GA	13.3%	309,700	326,700	5.5%	17,000	118,500	2.54
TOTAL		1,510,900	1,585,300	4.9%	74,400	575,500	
U.S. AVG	10.90%			4.9%			2.59

Table 14

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

Tertiary Market Race and Ethnicity
 International African American Museum

Regional Cities	WHITE	BLACK	ASIAN/ PAC ISL	HISPANIC ORIGIN
Columbia, SC	61.2%	34.4%	1.5%	2.7%
Augusta, GA	60.8%	34.9%	1.5%	2.2%
Savannah, GA	62.5%	33.8%	1.7%	1.9%
U.S. AVG	73.6%	12.4%	4.3%	14.2%

Regional Cities Approximate Population	WHITE	BLACK	ASIAN/ PAC ISL	HISPANIC ORIGIN
Columbia, SC	418,180	235,055	10,250	18,449
Augusta, GA	314,883	180,747	7,769	11,394
Savannah, GA	193,563	104,679	5,265	5,884
TOTAL	926,625	520,481	23,283	35,727

Table 15

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

Tertiary Market Effective Buying Household Income by Income Range
 International African American Museum

Regional Cities	Less than \$25,000	\$25,000 - \$49,999	\$50,000 or more	TOTAL
Columbia, SC	29%	37%	34%	100%
Augusta, GA	34%	35%	31%	100%
Savannah, GA	33%	33%	34%	100%
U.S. AVG	29%	35%	37%	100%

Table 16

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

Tertiary Market Income Summaries
 International African American Museum

Regional Cities	Per Capita	Median HH	AVR HH	Median EBI Index
Columbia, SC	\$18,115	\$38,082	\$47,002	97
Augusta, GA	\$16,442	\$35,186	\$16,442	89
Savannah, GA	\$18,755	\$36,790	\$18,755	94
U.S. AVG	\$19,289	\$39,324	\$51,284	100

Table 17

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

SCHOOL POPULATION

Depending on the quality of the programming and the link to curriculum taught in the schools, IAAM has the potential to attract a large number of school groups. The following table shows the estimated number of school aged children in the three market segments, based on children aged 5 through 17.

2005 Child Population by Age Range
 International African American Museum

	Estimated			
Age:	5 only	6 to 11	12 to 17	TOTAL
By County				
Berkley	2,117	13,186	13,626	28,929
Charleston	4,430	25,497	24,978	54,905
Dorchester	1,321	9,723	10,842	21,886
Subtotal	7,868	48,406	49,446	105,720
By Metro Area				
Colleton	563	3,512	3,567	7,642
Georgetown	756	4,694	5,105	10,555
Williamsburg	502	3,179	3,384	7,065
Subtotal	1,821	11,385	12,056	25,262
By Metro Area				
Columbia, SC	8,885	55,844	57,343	122,072
Augusta, GA	7,297	45,066	47,403	99,766
Savannah, GA	4,455	26,668	26,868	57,991
Subtotal	20,637	127,578	131,614	279,829
Total				410,810

Table 18

Sources: *Demographics USA County Edition 2005* and White Oak Associates, Inc.

School Field Trips

Current area school field trips include the South Carolina Aquarium, the Children's Museum of the Lowcountry, the Gibbes, Symphony youth concerts (sponsored with the help of the Junior League), science field trips to the beaches and Seabrook Island, and trips to Patriots Point. The State invested millions in the Aquarium project and arrangements at the time were made for 80,000 school children per year to attend the institution for free, although that number appears to be considerably less at present. The South Carolina Aquarium has been successful at attracting school children from Columbia, Augusta, Savannah, Beaufort, Greenville, and Charlotte. All this is encouraging data for IAAM. In fact, not only should IAAM be able to attract school

children from all the defined market segments, but also from the entire state of South Carolina.

South Carolina currently has a mandate that appropriations from the Education Lottery Funds must be used to supplement, and not supplant, existing funds for education. In the 2002-2003 fiscal year \$172 million was appropriated to the Department of Education for K-5 reading, math, science, and social studies. Several area museums and attractions responded with tailored programs and field trips that met these requirements. Drayton Hall has a dual-year field trip for 4th and 5th graders that is linked to state standards. Patriots Point also has developed a field trip for 5th graders that meets science and history standards. All fifth graders participate in this field trip via the lottery funds. There is a clear link to Social Studies for IAAM and if IAAM can link to two or all three of the topic areas it would be in a very strong position to serve the school system through field trips. With the increased emphasis on testing, museums nationwide have found that it is vital to link their programs and field trips to school curriculum.

There may also be the potential for school field trip funding from Charleston County through the accommodations tax, which supports and encourages tourism.

In the state, during 8th grade, students study South Carolina history and in high school study U.S. history. In the 2005-2006 school year there are almost 675,000 K-12 students enrolled in the state. Enrollment for the 5th grade is 51,452, the 8th grade is 55,589, and the 12th grade is 39,298. IAAM should explore school partnerships in these grades and provide programs both on-site and through outreach. It is more difficult to get students to visit in the middle and high schools years than in the elementary grades as kids rotate among many teachers as opposed to mostly one teacher and one class in grade school. Thus the approval process is more complicated in the older grades and there are fewer field trips at the higher grades, as is indicated in the table below. The table presents summary results from a survey of the Charleston County middle and high school districts conducted by the Heritage Education Forum.

If funding for field trips disappears, IAAM, along with other area museums and attractions will need to address the issue of lack of transportation. In many communities PTA's raise funds for field trips or parents pay the costs. This will be a challenge for some of the area schools. Another alternative is to raise funds from corporations to help underwrite field trips.

HEF Survey Results: Charleston County School District Middle and High Schools
 International African American Museum

Survey Question	Middle Schools	High Schools
1. Field trips each year?	a. 40% plan 2-3 local b. 60% plan 1 out of town/year c. 20% plan no field trips	a. 25% plan 1 local b. 75% plan no field trips
2. Biggest obstacles?	a. Time/scheduling constraints b. School administration c. Transportation costs	a. Time/scheduling constraints b. School administration c. Relevance to curriculum
3. How do you receive information?	a. Other teachers b. Past experience c. Brochure/flyers	a. Other teachers b. Past experience c. Brochure/flyers
4. Most efficient way for HEF to assist with curriculum?	a. Combine member sites into packaged field trips to fit specific standards b. Provide outreach c. Standards based pre/post-activities and lesson plans	a. Virtual Tours b. Outreach programs c. Combine member sites into packaged field trips to fit specific standards

Table 19

Source: Home Education Foundation

VISITOR/TOURISM POPULATION

The Center for Business Research at the Charleston Metro Chamber of Commerce tracks hotel/motel occupancy and annual number of visitors to the Charleston Area. The data from 1997 through 2004 is from their website. The estimate of those traveling with children in 1999 is from a Visitor Survey from 1999. The total number of tourists to Charleston is significant, over three million.

Charleston Visitor Counts

International African American Museum

Year	Total Visitors	% Change	Estimated % from SC	Less SC Residents	Total outside SC	Estimated % w. Children	Number w. Children
1997	2,500,000		10%	-250,000	2,250,000		
1998	2,600,000	4%	10%	-260,000	2,340,000		
1999	2,800,000	8%	9%	-252,000	2,548,000	16%	407,680
2000	2,930,000	5%	8%	-234,400	2,695,600		
2001	2,900,000	-1%	8%	-232,000	2,668,000		
2002	3,100,000	7%	7%	-217,000	2,883,000		
2003	3,260,000	5%	7%	-228,200	3,031,800		
2004	3,260,000	0%	7%	-228,200	3,031,800		

Table 20

Sources: Charleston Metro Chamber of Commerce (Center for Business Research) website and White Oak Associates, Inc.

TOTAL POPULATION BY MARKET SEGMENT

The table below presents the 2005 resident and 2004 tourist market segment populations that will be available to IAAM. With population projections showing increases, the number available to IAAM by the time it opens will likely be larger than this, assuming tourism levels are maintained or increase. The total market population is almost six million.

Market Size by Market Segment
International African American Museum

Market Segment	Population
Metro Area	583,700
DMA less Metro Area	135,400
Tertiary/Regional Cities	1,510,900
Tourists '04	3,260,000
School Enroll: K - 12	410,810
Total/Cumulative	5,900,810

Table 21

Sources: *Demographics USA County Edition*, South Carolina Convention and Visitors Bureau (Budget and Control Board) and White Oak Associates, Inc.

MARKET OPPORTUNITIES AND CHALLENGES

From the perspective of regional location and area needs, the International African American Museum is a good fit with Charleston, provided that it can overcome the current lack of African American tourism (outside of the MOJA Festival) to the Charleston area. If IAAM is developed as envisioned and positioned and marketed well, it has the potential of becoming a significant draw and a key attraction for African Americans exploring their roots and for all people, regardless of race and color, interested in American history. Other challenges that will have to be overcome are the annual support revenue needed to run the facility, a challenge faced by all museums, as well as the lower than average income of many of the African American residents in the market areas.

Table 22 below presents some of the opportunities and challenges facing IAAM. Other factors are discussed in the chapter on *Attendance Potential*. For example, the success of the MOJA festival is a good indication of the success and desire for African American programming. On the other hand, some other African American or Civil Rights oriented museums in the country have met with mixed success regarding attendance and financial sustainability. Some have been successful, while others have struggled (see more information on other African American museums and cultural facilities in both the *Attendance Potential* and the *Operating Pro Forma* chapters of this report.)

OPPORTUNITIES

CHALLENGES

Area Attractions

<ul style="list-style-type: none"> ■ The aquarium attracts school groups from Savannah, Charlotte, Asheville, Greenville and Columbia, a good indication of a broad reach for attracting groups. ■ Attendance at the aquarium, although less than originally projected, is still significant and indicative that attractions in the Charleston area can draw large crowds. Attendance is also strong at Patriot’s Point, Fort Sumter, Liberty Square and the festivals. ■ IAAM will help fulfill a need for attractions/resources that are geared towards residents as well as tourists. ■ “No one (in the area) is telling the African American history story. It needs to be told.” And there is no other museum in the region that is similar to the vision for IAAM. 	<ul style="list-style-type: none"> ■ Attendance at Charleston museums is not very large.
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Tourism

<ul style="list-style-type: none"> ■ Tourism is big business in South Carolina and Charleston has an infrastructure in place to promote IAAM and include it in the African American Heritage Trails and the broader umbrella of the South Carolina Heritage Corridor. ■ Heritage tourism is a growing market. ■ History and historic attractions are already a prime reason that tourists come to Charleston. ■ Charleston has a strong tourist population, estimated at about 3 million people residing outside of South Carolina. ■ IAAM has the potential to attract a more diverse profile of tourists. ■ Tourists spend, on average, several nights in the area allowing for visits to multiple attractions. ■ Family reunions are a good potential market for IAAM. ■ The Port of Charleston was one of the major entry points for enslaved African Americans in the 17th, 18th and 19th centuries. It has the potential of becoming a major heritage destination for African Americans, just as Ellis Island is an important site for descendants of 19th- and 20th-century 	<ul style="list-style-type: none"> ■ The City of Charleston may not be currently top of mind for African Americans planning vacations. ■ Hotel and bed and breakfast accommodations and area restaurants must feel welcoming to the African American community. ■ The tourist population is over 90% white. IAAM, if it is to attract these tourists (who will have more disposable income just because they are on vacation), must market and program the museum to appeal to both African Americans and non-African Americans.
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immigrants.	
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OPPORTUNITIES

CHALLENGES

Local and Regional Resident Population

<ul style="list-style-type: none"> ■ The Charleston area has very high percentages of the population that are African American. ■ There is a large African American community within driving distance, approximately 767,000 in the three defined market segments. Columbia's has a very large African American population and is only a two-hour drive away. ■ None of the three cities in the Tertiary Market have any museums or attractions similar to what the vision is for IAAM. IAAM could be a significant destination point for African American residents of Columbia, Augusta and Savannah, all of which are within a two to three-hour drive. ■ Be a family and community gathering place for area residents 	<ul style="list-style-type: none"> ■ Significant portions of the population are poor and have limited leisure dollars. A ticket price structure, or other methods to allow free visitation from selected groups, needs to be developed that will address this issue. ■ There are a high percentage of working mothers. ■ The counties in the DMA and beyond the Metro area have small populations with many households with limited financial resources.
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Connections with Schools

<ul style="list-style-type: none"> ■ IAAM's programs for school children have the potential of linking with many grade levels. ■ There are great opportunities to link with state history standards, specifically the 8th grade, when SC history is studied, and U.S. history in high school. ■ Opportunities for teacher training ■ Develop outreach and distance learning programs for schools. ■ Partner with other area museums/attractions to offer same-day field trips. 	<ul style="list-style-type: none"> ■ In the future, will funding be available for field trips? ■ It is easier to get field trips authorized for elementary school children (who have essentially one teacher and classroom) than those in middle school or high school when approval is needed from many teachers. ■ Pressure for accountability is reducing school time allotted to other than basic subjects (reading, math).
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OPPORTUNITIES

CHALLENGES

Quality of Life and Area Needs

<ul style="list-style-type: none"> ■ Provide a welcoming and meaningful experience and meeting place for resident African Americans. ■ IAAM has the potential to assist in bridging the cultural divide still a part of the Charleston community. ■ Trident children need as much support as possible. As stated in the 2005 <i>Kids Count</i> report, “the efforts of families must be supported by community partners.” ■ Create after school, holiday, summer programs, and camps for children. ■ Create internship opportunities for teenagers and area college students. High school funding could be pursued through Title 1 funds. ■ IAAM is a good fit with the city’s development of the Upper Peninsula. 	<ul style="list-style-type: none"> ■ With a sense of a cultural divide in the community, how will IAAM position itself to attract the non-African American community without compromising the vision for the museum?
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Collaborations and Partnerships

<ul style="list-style-type: none"> ■ Great potential to collaborate with the Avery Research Center at the College of Charleston and other universities in the area. Students are also a good source of volunteers. ■ Important to partner with the MOJA Festival. ■ Program and marketing partnerships with Spoleto, Piccolo, the Gibbes, the Children’s Museum of the Lowcountry, and the Charleston Museum. ■ Partner with and act as a hub for the City’s mentoring program at schools and civic clubs, by matching African American mentors with children. ■ Partner with the nearby SC Aquarium: Opportunities include joint ticketing, combined field trip packages for schools, and combined group tour packages. ■ Joint ticketing with IMAX® Theater, Gullah Tours, Gullah Cuisine, Boone Hall, walking tour guides, etc. ■ Establish links with the proposed Lowcountry Gullah-Geechee Culture National Heritage Area; explore possibility of being its museum site in S.C. ■ Opportunities to partner with the Urban League of Charleston, for example, in its teen leadership program for middle school students. ■ Center for Partnerships to Improve Education at the College of Charleston – established in 2005 to support the improvement of PK-12 education through partnerships. Collaborate with its oral history project. ■ Act as a meeting place for participants in mentoring program of the Mayor’s Office for Children, Youth and Families. ■ Local churches 	<ul style="list-style-type: none"> ■ Partnering can be labor and staff intensive, and one must be selective about the number of partnerships entered into. ■ Experienced African American museum professionals are rare in this region.
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OPPORTUNITIES

CHALLENGES

Location and Transportation

<ul style="list-style-type: none"> ■ There is plenty of parking in the area planned for the location of IAAM. ■ Charleston is easily accessible from the north, south, and west on interstates, and is easily accessible from Columbia, Savannah, and Augusta. ■ The Upper Peninsula is continuing to be developed. ■ IAAM’s location as part of an established tourist area (the South Carolina Aquarium, the Imax®, and Fort Sumter is excellent). ■ A possible public transportation link that would reach all the way to the airport. 	<ul style="list-style-type: none"> ■ Poor public and school transportation system and lack of public transportation for rural population. ■ Parking in the Lower Peninsula is a big issue and many residents avoid going during peak times.
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Financial Support and Fund Raising

<ul style="list-style-type: none"> ■ A potential to raise funds from African Americans outside of the region. ■ Ongoing public support, from various levels of government should be pursued. ■ There is an opportunity to trade with local radio, print and TV stations and others for marketing and advertising. ■ Obtain in-kind support from local advertising firms 	<ul style="list-style-type: none"> ■ Other African American museums are raising support nationally. ■ Having to raise annual funds for support is a major concern for all museums. A fund raising feasibility study should be considered in order to determine the potential annual funding that IAAM could achieve and make sure it fits with the proposed scale of the facility. ■ All museums need some level of public funding to meet annual operating needs. What organization(s) will provide that for IAAM? ■ There is not a large pool of companies for annual corporate giving and few corporate headquarters, although there is some growth in that area. ■ Competition with other non-profits for support funds is very intense and there are many other non-profits. ■ Aquarium financing has and will continue to absorb the fund raising community ■ Few area businesses can afford to offer pro bono services (e.g. advertising, design)
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Table 22

Source: White Oak Associates, Inc.

Part IV, Chapter 2: Attendance Potential

Assumptions and Overview

Introduction

In the previous chapter, *Market Assessment*, the market segments available to IAAM were defined and examined for population, age, and income distribution. Attendance potential estimates are presented in this chapter, as well as a comparative analysis of other African American museums and regional attractions.

The attendance potential estimates presented for IAAM are for a stable operating year, which is assumed to be Year Four after opening, after the excitement surrounding the opening of a new museum subsides, and attendance is driven more by marketing and programming choices. The projections are based upon the components and sizing outlined in other chapters of this report. A summary of some of the challenges and opportunities that will face IAAM appears in the previous chapter, *Market Assessment*.

Attendance at Selected Regional Attractions

The table on the following page shows attendance at selected attractions and museums in the Charleston area. Trends over time are indicated by comparing 2004 and 1998 data. Attendance numbers were taken from the 1998⁷ and 2004 Directories of the American Association of Museums⁸ as well as from the City of Charleston. Since 1998, attendance numbers have declined slightly. 2004 attendance numbers range from a low of 10,000 at the Avery Research Center to a high of over 430,000 visitors to the South Carolina Aquarium. The next highest attendance was at Patriot's Point (almost 300,000), followed by Fort Sumter (189,000), the departure point for which is across the street from the proposed location for IAAM. Fourth highest was 145,000, at the Charles Towne Landing, which dropped significantly from reported attendance in 1998 of over 300,000. The table also includes projected stable year low, mid, and high attendance scenarios for IAAM.

⁷ Attendance for 1998 had been collected for another project in the Charleston area several years ago and was readily available as a comparison in this report.

⁸ Note that attendance numbers in directories are often estimated by the institution instead of exact numbers, and are sometimes inflated as they may include outreach or off-site festivals. At minimum, the numbers are for total on-site attendance. Nevertheless, the attendance will not be more than what is shown and gives a sense of scale for the various attractions.

In 2003, the aquarium was serving about 20,000 school children who attended for free. All school groups and paid groups represented about 12-14% of overall attendance, which calculates to 52-61,000, if attendance is 439,000. Note that school groups generally make up over 90% of all paid groups. Schools come from Savannah, Charlotte, Asheville, Greenville, and Columbia. The aquarium audience is primarily white. It was also estimated that 45% of its attendance was from the Tri-county area. That percentage appears to relate to total attendance, not just school groups, although the data did not state that specifically. The aquarium did estimate that about 40% of their general attendance, excluding members and groups, was from residents and 60% from tourists, although they did not define the terms resident and tourist. If one included members, the resident percentage would certainly be higher.

MOJA is the only major annual event that celebrates African, African American, and Caribbean heritage in the Southeast. It was started in 1984. The festival runs for ten days from the last week of September into the first week of October. MOJA's goals are to educate and entertain. Attendance varies depending on the concert. The Reggae Block Festival attracts the largest number, around 18,000. The R&B concerts at Joe Riley Park attract about 4-5,000 people with tickets at \$7 - \$22. The Jazz Concert attracts around 1,500 people with tickets at \$18-\$20. The finale, at Hampton Park, attracts around 10,000 and is free. There is also an African American Heritage Day that includes a free vendor market for local and young artists, which attracts about 3,000 people. MOJA also hosts and offers debates, educational outreach programs for school children in sixteen schools, and a literary workshop for middle school students, which is held at Avery Research Center. MOJA underwrites the cost of busing the children in for the latter event. Visitors to the festival come from New York, New Jersey, Massachusetts, Michigan, Georgia, North Carolina, and Virginia, and many come on day trips from Columbia and Greenville.

Attendance at Selected Regional Attractions
 International African American Museum

Attraction	1998 Attendance	Metro Pop. Attd Ratio	2004 Attendance	Metro Pop. Attd Ratio
Charleston MSA		487,800		573,900
SC Aquarium			439,123	77%
Patriot's Point Naval and Maritime Museum	N/av	N/av	298,045	52%
Fort Sumter	337,000	69%	189,000	33%
Charles Towne Landing & State Historic Site	300,000	62%	145,000	25%
Magnolia Plantation & Gardens	160,000	33%	<i>135,000</i>	24%
The Charleston Museum	122,634	25%	113,200	20%
IAAM-Future Stable Year High-Scenario			110,000	19%
Middleton Place	<i>100,000</i>	21%	<i>100,000</i>	17%
IAAM-Future Stable Year Mid-Scenario			88,000	15%
Children's Museum of the Lowcountry			74,704	13%
Old Exchange & Provost Dungeon	73,292	15%		
IAAM-Future Stable Year Low-Scenario			66,000	12%
Historic Charleston Foundation (Homes)	<i>65,000</i>	13%	<i>60,000</i>	10%
Gibbes Museum of Art	<i>60,000</i>	12%	<i>57,000</i>	10%
Drayton Hall	60,000	12%	53,000	9%
Avery Research Ctr for Af-Amer History/Culture	10,000	2%	8,500	1%

Table 1

Sources: AAM Directories 1998 and 2004;
 SC Aquarium, Fort Sumter and Patriot's Point from the City of Charleston.

Italic numbers mean that they were estimated in the AAM Directory. Non-italic numbers were indicated in the AAM Directory as "accurate."
Note that numbers reported for the AAM Directories are often approximate and may include outreach.

The Charleston Metro Chamber of Commerce and the Convention and Visitor Bureau monitor attendance annually at twelve Charleston attractions and museums. In 1996, total combined attendance was over 1,200,000. Included in this number were Fort Sumter, Patriot's Point, the Gibbes, Drayton Hall, Middleton Place, and several historic homes. In 2000 additional attractions were added to the survey including the South Carolina Aquarium and the IMAX® Theater.

The following table shows that the number of visitors to the attractions grew steadily from 2000 to 2002 (when the SC Aquarium was new) but declined in 2003 and 2004. The Visitor Center experienced growth from 1999 through 2001, but declined or remained flat in 2002, 2003, and 2004.

Attraction and Visitor Center Attendance

International African American Museum

Year	Attractions Subset 1	Attractions Subset 2	Attractions Both 1 and 2	Attractions Incr/(Decr)	Visitor Center	Incr/(Decr)
1989	1,191,137		1,191,137			
1990	985,091		985,091	-17%		
1991	1,226,039		1,226,039	24%		
1992	1,333,703		1,333,703	9%		
1993	1,299,896		1,299,896	-3%		
1994	1,257,912		1,257,912	-3%		
1995	1,258,708		1,258,708	0%		
1996	1,235,775		1,235,775	-2%		
1997	n/a	n/a	n/a	n/a	815,779	
1998	1,281,542		1,281,542	4%	801,779	-2%
1999	1,220,441		1,220,441	-5%	929,442	16%
2000	1,217,597	587,177	1,804,774	48%	1,048,680	13%
2001	1,269,148	785,414	2,054,562	14%	1,181,325	13%
2002	1,295,423	805,820	2,101,243	2%	1,058,482	-10%
2003	1,159,682	734,667	1,894,349	-10%	1,056,263	0%
2004	1,087,580	701,872	1,789,452	-6%	969,218	-8%

Table 2

Sources: Charleston Metro Chamber of Commerce Center for Business Research and Charleston Visitor Center

Profiles of Other African American Museums

[Also see *Part IV, Chapter 3: Stable Year Operating Pro Forma* and *Working Paper III: Data on Other African American Museums.*]

Overview

Major factors that can affect attendance at museums include age, income, education, children, and distance from an attraction. Other factors considered in forecasting attendance potential are location, size of the exhibit halls, and size of the tourist population. Surveys have also shown that children who were taken to museums by their parents are more likely, as adults, to take their children to museums.

Comparing statistics from other museums, and using historical data to help project attendance is crucial, with the caveat that no two museums are exactly alike. This is especially true of museums focusing on African American themes, heritage, and culture. The difficulty is that there are few similar museums to compare to. For example, there are hundreds of science centers and children’s museums in the United States, both with associations that publish detailed statistics on their member museums. There are far fewer

African American museums in the country and little attendance and financial data readily available. They also vary widely in their purpose and funding. Some are art museums, a few are focused more on the performing arts, some have collections, and some are focused on the civil rights movement. Some are free, and some are state-funded. The variables are so great it is difficult to find usefully comparable museums. Many of the African American museums are relatively young, having opened in the 1960's or more recently. Some of the museums were successful enough that they have undergone expansions since opening. Some have seen steady growth in attendance, like the Birmingham Civil Rights Institute.

Several new museums have only opened recently, including the National Underground Railroad Freedom Center in Cincinnati and the Muhammad Ali Center in Louisville. The Freedom Center exceeded its first year attendance estimate of 260,000 by 20,000, but attendance has declined significantly since August 2005⁹. Another proposed museum in Louisville, the Kentucky Center for African American Heritage, is currently on hold as a result of a state audit. To date, \$17 million has been invested in the project by a variety of sources. Another major new African Museum of History & Culture opened in Baltimore in June 2005. Greensboro, North Carolina, has been in a lengthy process (with difficulty raising funds) of developing a museum in the Woolworth building that housed the lunch counter where African American college students "sat in" the "whites-only" section. Towering above all these is the projected National Museum of African-American History and Culture in Washington, D.C., that will be part of the Smithsonian complex and on a prominent site near the Washington Monument. Current planning is for a 350,000 SF museum.

With the caveats stated above, the tables below present attendance data for a selection of African American museums and cultural centers. Many of the African American museums, on a broad scale, would fit under the umbrella of history museums (excluding some of the very large state history museums). Attendance at history museums, when looked at in comparison to other types of museums in a city, tend to fall below science centers, art museums, medium-to-large scale zoos and the larger children's museums. Historic houses tend to be at the very bottom of the scale. Some of the history museums built more recently have taken a different approach. They emphasize visitor interaction, mount frequent temporary exhibits, and target family audiences as well as adults. This approach, and also the scale of the facilities, has helped to broaden the audience base.

A standard way to analyze attendance is to look at the attendance to metropolitan (or DMA¹⁰) population ratio (attendance divided by the metropolitan or Designated Market Area population). Generally, as the population base decreases, the attendance ratio increases. Museums located in very small population bases can have ratios of over 100% of the metro population. The size of the tourist population also affects the ratio. Some

⁹ "Underground Railroad Museum \$5.5M in Red," *Seattle Post-Intelligencer*, March 15, 2006,

¹⁰ The MSA refers to the Metro Area population and the DMA refers to the Designated Market Area, the geographic reach of a television station.

experts in the museum field believe that, along with other comparative statistics, there is a correlation between exhibit hall size and attendance. The premise behind this is that facilities of a given size, exhibit halls, and components (i.e., an IMAX[®] Theater) will attract, generally, the same number of people regardless of resident market size. In general, comparing attendance figures for museums of somewhat similar size, Metro Areas (MSA's) and DMA's can be useful for a broad overview, but does not explain anomalies among attendance figures. For example, a museum may have a relatively large attendance because it does not charge admission or because it has an unusually large tourist population. Also, some museums are more adept at marketing themselves than others, or have less or more competition in their area. Others may have better exhibits. It is important to consider many aspects of each museum's performance. There is also the phenomenon of the size of an attraction and the number of its components. A major theme park, like Disneyland, could attract millions of people, even if it were located in an area with a small population base.

In Table 4, the attendance to metro population ratios range from 2% to 17%. The average and median are 9%. The low to high projections for IAAM range from 12% to 19%. These ratios are affected by the tourist population, which is difficult to define in the same way for each location, as there are a variety of ways that tourism is estimated by each city. Cities like Chicago and Atlanta will obviously have larger tourist populations than Charleston. It is also hard to determine what percentage of tourists is African American. The ratios are also affected by museums that are free. Both the museums in Atlanta and Dallas are free, although they have a suggested donation. The Birmingham Civil Rights Institute is free every Sunday and all school children are admitted for free. The DuSable Museum in Chicago only charges \$3.00 for adults.

There is another phenomenon of museums reporting their attendance in different ways. Attendance at the Museum of African American History in Detroit is listed as 400,000 but their paid attendance was actually only 65,000. Their attendance number includes outreach and on-site special events and other non-admission based attendance. There is a huge difference between the two numbers. Normally admissions attendance is only 10% to 20% lower than the total on-site attendance. On the other hand, the attendance shown for the National Civil Rights Institute in Memphis is for exhibit admissions, so total on-site attendance would be more than shown.

Charleston will have a higher than average attendance to MSA ratio because of the small size of its population in comparison to the majority of the other cities. Five of the seven museums have metropolitan populations of over one million. Charleston's IAAM, in a smaller market and with less competition, will be able to market itself more easily to area tourists and visitors. The more difficult task in the early years will be to attract new African American day-trippers, as they are not currently coming to Charleston in large numbers except for the MOJA festival.

Based on the mixed attendance at some of the African American museums, the projections for IAAM are somewhat conservative. Also note that paid attendance for

IAAM will be less than potential on-site attendance, which includes function rentals, programs, special events, and other public uses of the building.

Selected African American Museums

International African American Museum

Name	City	Year Center Founded, Open and/or Expanded
MLK Jr. Ctr for Nonviolent Social Change	Atlanta	1980
Birmingham Civil Rights Institute	Birmingham	1992
DuSable Museum of African American History	Chicago	1971/1993 Expand
African American Museum	Dallas	1974 and 1993
Museum of African American History	Detroit	1987 and 1997
Tubman African American Museum	Macon	1985, planning an expansion
National Civil Rights Museum	Memphis	1991/2002 expand

Table 3

Sources: American Association of Museum Directories, Museum websites and Tax Forms 990

Attendance (Sorted by Metropolitan Population)
 International African American Museum

Name	City	FY of Data	Total Sq. Ft.	Exhibit Sq. Ft.	Total Attendance	Metro Population	Metro % Black Population	Metro Calculated Black Population	Ratio Attd to Metro Pop	Ratio Attd to Metro Black	DMA Population	Ratio Attd to DMA Pop	Ratio Attd to DMA Black
DuSable Mus. of African American History	Chicago	2003	*	*	150,000	8,489,500	19%	1,587,537	2%	9%	9,496,000	2%	10%
African American Museum	Dallas	2004	*	*	201,000	5,705,100	14%	781,599	4%	26%	6,332,900	3%	27%
MLK Jr. Ctr for Nonviolent Social Change	Atlanta	2004	several historic bldgs		650,000	4,704,400	29%	1,354,867	14%	48%	5,651,400	12%	53%
Museum of African American History	Detroit	2004	120,000	28,100	400,000	4,496,300	23%	1,029,653	9%	39%	5,033,700	8%	42%
National Civil Rights Museum	Memphis	2004	40,000	*	160,000	1,250,400	45%	561,430	13%	28%	1,790,200	9%	31%
Birmingham Civil Rights Institute	Birmingham	2003	58,000	29,000	141,000	933,100	30%	278,064	15%	51%	1,763,900	8%	61%
Tubman African American Museum	Macon	2004	8,500	3,900	15,000	227,200	42%	96,106	7%	16%	613,500	2%	17%
Average (excluding IAAM)			56,625		245,286	3,413,950	27%	741,269	9%	31%	4,112,900	6%	34%
Median (excluding IAAM)			49,000		160,000	3,000,950	26%	671,514	9%	28%	3,627,650	8%	31%
IAAM (high-scenario)	Charleston	2005	59,612	21,100	110,000	583,700	32%	185,033	19%	59%	719,100	15%	55%
IAAM (mid-scenario)	Charleston	2005	59,612	21,100	88,000	583,700	32%	185,033	15%	48%	719,100	12%	44%
IAAM (low-scenario)	Charleston	2005	59,612	21,100	68,000	583,700	32%	185,033	12%	37%	719,100	9%	34%

Table 4

Sources: American Association of Museum Directories, Individual Museums, Museum websites and Tax Forms 990

* Note: Repeated attempts were made to collect missing data from the museums but calls and emails were not returned by all. Museums can receive one or more requests for data a week and are unable to respond to all requests.

School attendance: The Birmingham Civil Rights Institute estimated that about half its attendance is from school groups (school groups attend for free). The National Civil Rights Museum in Memphis stated they serve approximately 40,000 students annually.

Attendance by Race: The museum in Birmingham broadly estimated that 60-70% of its audience is African American and the museum in Detroit estimated about 54% for African American visitation.

Derivation of Capture Ratios

It is important to make the distinction between forecast *attendance potential* and IAAM's *actual future attendance*. For the actual number to equal or surpass the potential, both the original estimating and the resulting creation of a new museum have to be done correctly. The second task is by far the more complicated and subject to compromise. Cultural attractions that do not meet their attendance potential estimates typically have poor building profiles, undersized facilities, thin and/or stagnant programming, inefficient operations, inadequate marketing, or a combination of these problems. The quality of board leadership and staff is also a factor.

Other factors that affect likelihood of capturing markets are distance, pricing, economic circumstances of persons living within the markets, market conditions, parking, and accessibility, perceived safety of the site, marketing, and more. The degree to which IAAM successfully deals with these issues suggests whether market penetration will be high or low for each segment. Of course, even the best attractions can be rendered somewhat powerless under very poor economic circumstances or severe weather.

Attendance Potential for IAAM

The table on the following page shows projected attendance potential by market segment for a future stable operating year. The market segment populations are based on the assumptions made in the Market Assessment chapter. The capture ratios projected are based on the planners' knowledge of the museum industry, attendance at other African American museums, attendance at Charleston area attractions and museums, and specific factors relating to IAAM and the Charleston area.

IAAM has the potential of exceeding the high-scenario if it can establish itself as a major destination point for African Americans and for all tourists interested in American History, provided that there are adequate funds for changing programming and marketing and provided there is a strong, professionally savvy director in place to guide the institution. There must also be staff with museum expertise. Several museums have struggled because they have been led by senior staff with little museum experience or understanding as to what will attract residents and tourists. Note that a museum with a very high percentage of tourist visitation can change less often than one whose visitation is primarily dependent on residents. IAAM is weighted more towards residents and school visitation than tourist visitation.

The table below presents low, mid and high potential attendance potentials for IAAM. The middle scenario is used as the basis of the stable year operating pro forma presented in the following chapter, *Stable Year Operating Pro Forma*.

**Future Stable Year Attendance Potential:
 Conservative Scenario Used for Operating Pro Forma**
 International African American Museum

Market Segment	Population	Low	High	Rounded		Rounded	
		Capture	Capture	Low Attd	Share of Total	High Attd	Share of Total
Primary Market (MSA)	583,700	3.50%	5.00%	20,000	30%	29,000	27%
Secondary Market (DMA less MSA)	135,400	1.00%	3.00%	1,400	2%	4,000	4%
Tertiary Market (3 Reg'l Cities)	1,510,900	0.50%	0.75%	7,600	12%	11,000	10%
Tourists '04	3,260,000	0.50%	1.00%	16,300	25%	32,600	30%
K-12 School Age Children (in the 3 Markets)	410,810	5.00%	8.00%	20,500	31%	33,000	30%
Total/Cumulative	5,900,810	1.1%	1.9%	65,800	100.0%	109,600	100.0%
Nominal Attendance Range and Midpoint				66,000	88,000	110,000	
General Public				69%		70%	
School Share				31%		30%	
Total Resident				75%		70%	
Total Tourist				25%		30%	

Table 5

Sources: White Oak Associates, Inc., Demographics USA County Edition 2005, SC Convention and Visitor's Bureau

Part IV, Chapter 3: Stable Year Operating Profile

Assumptions and Overview

Introduction

The preliminary operating pro forma for IAAM, presented in this chapter, is for a stable year of operations, assumed to be four years after opening. The pro forma is what is called a “top down” budget and will need further refinement as the project continues to take shape. The next step, in a future phase of planning, would be to develop a “bottom up” business plan that would include a more refined staffing list, as well as expenses by department for the first five years of operations. Expenses presented in this chapter are functional expenses in broad categories, for the entire facility, and are not broken out by department.

Three operating scenarios are presented: low, middle, and high, based on increasing attendance at exhibits, programs and function rentals.

Assumptions

- All estimates are in 2006 dollars.
- The capital budget is currently \$69.3 million dollars.
- The museum will be approximately 59,612 square feet with 21,100 SF of exhibit space, including a changing exhibit space of 7,500 sq. feet. At 7,500 SF, the changing exhibit space is large enough to accommodate major traveling exhibits, which start at around 5,000 SF. It will also allow the space to be divided into sections so that two smaller temporary exhibits could be accommodated at the same time.
- There will be three program spaces.
- There will be an endowment fund of \$10 million in place by the stable year, and ideally in place by opening year.
- There will be a theater with a high quality presentation created specifically for IAAM.
- The museum will be located on the site across from Fort Sumter and the South Carolina Aquarium and the Imax® Theater.

- The museum will contain the components described in other parts of this report.
- The museum will have an annual marketing and advertising budget that will enable it to reach both residents and tourists, African Americans and non-African Americans. The traveling exhibits will also need to be promoted with advertising and marketing dollars.
- The museum will be professionally run and deliver exhibit, program and event experiences of a high quality.

Achieving the Potential

In light of the performance at other existing African American museums, the development of IAAM should be pursued with caution. There is no guarantee that IAAM will be able to achieve the attendance potential (even though it is not aggressive) or the earned and support revenues presented in the operating pro forma. As stated by the current president of the board of the African American Museums Association, some of the African American museums are doing well and others are not. He also indicated that African American museums are experiencing some of the same trends as all museums, namely, a drop in attendance and support funding that is harder to raise.

There are success stories, such as the Birmingham Civil Rights Institute, which has seen steady attendance and/or growth in attendance over time. It receives over 50% of its annual funding from the city and county. The National Civil Rights Museum in Memphis expanded in 2002, ten years after opening the original museum, and one must presume the expansion was based on past success. The Tubman African American Museum in Macon is planning to open an expansion in 2006, increasing its original size from 8,500 square feet to 49,000 square feet. On the other hand, several museums have struggled for survival. The Underground Railroad Center in Cincinnati is \$5.5 million in the red only 18 months after opening. The Charles H. Wright Museum of African American History in Detroit has been struggling since its expansion in 1997. In 2001 it had a \$2 million deficit out of a \$7 million dollar operating budget and in 2004 it said it needed an additional \$510,000 from the city in order to stay open and pay staff. The African American Museum in Philadelphia repeatedly could not make payroll. In 2004, it laid off its entire staff and ran the museum with volunteers.

The underlying reasons for the failure of museums to meet their attendance projections are unclear. In some cases, static, non-changing exhibit programs were likely contributors. Other critical issues were cited in an Institute of Library and Museum Services (IMLS) report¹¹ from July 2004, presenting results of a forum that IMLS hosted

¹¹ *African American History & Culture in Museums, Strategic Crossroads and New Opportunities*; July 2004, IMSL

on African American museums. It was attended by several directors of existing African American museums. Some of the critical issues cited included:

- The lack of experienced museum professionals at the management level.
- The difficulty in attracting talented professionals.
- Difficulty in producing traveling exhibits (which encourage repeat visitation and new audiences) because of the lack of staff skills to research, interpret, create educational materials and produce the exhibition.
- Lack of experience of many boards.
- The challenge of “maintaining the coherence and integrity of their exhibits and programs while making them relevant to diverse audience segments.”

What are some of the requirements that would enable IAAM to be successful? Many are highlighted in the table on “Opportunities and Challenges” that appears at the end of the Market Assessment chapter. An endowment with income that supports operations is critical. A \$10 million endowment has been built into the capital budget for IAAM. Increasing that amount would be better, but may not be realistic in terms of raising more funds. Identifying annual operating support from some or several levels of government (city, county, state or federal) is also crucial. Establishing partnerships with the school systems early on in the development of the project will be advantageous. Attracting experienced professionals to manage the capital phase and operations after opening will be essential.

Earned Revenue and Attendance

Attendance

A more detailed discussion of the attendance potential appears in the *Attendance Potential* chapter. The attendance potential estimate was based on industry trends, the planning team’s knowledge of museum performance, attendance at area attractions and data regarding other African American museums and cultural centers. As mentioned above, the attendance shown is for a typical operating year, assumed to be year four after opening. Years one and two are expected to have higher attendance if IAAM follows trends experienced by other newly opened museums.

Earned Revenue

The revenue for the operating pro forma is based on calculating potential earned revenue by category: admissions, function rentals, store, classes, etc., and is based on the

assumptions shown in Table 1. Gross revenue is reported for most areas except for catering revenue from function rentals, which appear as net income.

Earned revenue is expected to range from 21% to 32% or \$509,000 to \$934,000. Admission revenues, at 40%, will be the largest source of earned revenue. A standard way to analyze admissions revenue is to use the adult ticket price as the basis and then discount it to allow for lower ticket prices for seniors, children, students, members who attend for free and discounted tickets and free attendance. Admissions revenue is then calculated by multiplying the average ticket price (ATP) by ticketed attendance. Visits by school children are expected to comprise about 30% of admissions revenue. It is quite possible that school visitation to IAAM would be higher than anticipated if a strong link with the curriculum is achieved. If school visits increase as a percent of total admissions visitation than the average ticket price would need to be adjusted downwards as school children visit at a significantly reduced priced.

The adult ticket price has been set at \$8.00 and the child ticket price at \$4.00. These are preliminary prices that should be updated once a more thorough pricing study has been conducted. As shown in Table 1, the prices are in line with other area museums and significantly less than the South Carolina Aquarium. Ticket prices have been set to encourage resident visitation. There is a rationale to consider lower ticket prices for area residents and a higher ticket price for tourists. This is hard to implement and may also offend African American overnight tourists and day-trippers visiting IAAM. Memberships, in essence, are a way to allow residents to have a lower admissions price. Sponsorships could also be sought to underwrite memberships for local families. Some museums offer corporate memberships, which include a large number of admission passes. Some companies know they will not use all the passes and return them to the museum. The museum in turn gives them to organizations that write requesting free admission because of economic constraints. Another often-used model is to give local libraries an admission pass and library users can use the library's pass to visit the museum. Other museums have a buy two memberships programs – one for your own family and one for a family who cannot afford the membership. The Children's Museum of Lowcountry has implemented that model. Some museums have a free or reduced admission day or evening. Some are weekly and others may be once a month. Some museums get corporate sponsors to underwrite the free periods.

The second highest earned revenue would come from the museum store, followed by memberships and special events. Income is also expected to come from active programming in the three programs rooms. Programming would include weeklong summer camps, classes during school holiday weeks, weekend and after school classes, adult evening classes and lectures and teacher training. The number of staff to support this level of activity is minimal and it is assumed that some classes would be run by contract labor.

Function rentals can be very lucrative for museums, especially if the types of function rentals permitted is broad, by including weddings and other non-mission related

functions. Family reunions also have great potential for IAAM. In a future phase of planning a function rental study should be conducted to get a better understanding of the potential in this market. IAAM will have many spaces that can accommodate after hours function rentals: the rooftop garden, the Family and Community Gathering spaces, the theater, the exhibit halls and the main lobby. The outdoor festival plaza will also be available. Spaces like the exhibit halls will only accommodate non-seated events.

Another source of earned revenue will come from the Digital Family History Center where individuals and families will be able to log their ancestor's names to a database to be managed by IAAM. The center is modeled after other centers, such as the US Navy Log at the US Navy Memorial.

To achieve the projected revenues, IAAM will have to support the programs and exhibit halls with adequate advertising and marketing dollars as well as deliver a high quality experience. A strong sales staff will also need to be in place to service and promote the function rentals, special events, and active programming. It is assumed that IAAM will host many special events, some with lower admission fees (such as concerts and award ceremonies) and some with higher fees such as for opening of new exhibits. With the operating pro forma highly dependent on admissions revenue, the exhibit halls and theater will need to offer a first class experience. If IAAM is to continue to attract residents, than the museum will have to offer enough change to promote repeat visitation.

Ticket Prices: Selected Charleston Area Attractions

International African American Museum

ATTRACTION	2005	2005
	Adult Tix	Child Tix
Middleton Place	\$ 25.00	\$ 5.00
SC Aquarium	\$ 15.00	\$ 8.00
Magnolia Plantation & Gardens	\$ 14.00	\$ 8.00
Patriot's Point Naval and Maritime Museum	\$ 14.00	\$ 7.00
Fort Sumter	\$ 13.00	\$ 7.00
Drayton Hall	\$ 12.00	\$6 & \$8.00
The Charleston Museum	\$ 10.00	\$ 4.00
Historic Charleston Foundation (Homes)	\$ 8.00	\$ 8.00
IAAM-Future Stable Year	\$ 8.00	\$ 4.00
Children's Museum of the Lowcountry	\$ 5.00	\$ 5.00
Old Exchange & Provost Dungeon	\$ 7.00	\$ 3.50
Gibbes Museum of Art	\$ 7.00	\$ 4.00
Charles Towne Landing & State Historic Site	\$ 5.00	\$ 2.50
Avery Research Ctr for Af-Amer History/Culture	Donation	Donation

Table 1

Source: White Oak Associates

Attendance, Facility, Ticketing and Membership Assumptions

International African American Museum

ASSUMPTIONS	LOW	MID	HIGH
Facility			
Building Square Footage	59,612	59,612	59,612
Exhibit Square Footage (w. theater)	21,100	21,100	21,100
Traveling Exhibit Space	7,500	7,500	7,500
Store Sq. Footage	1,300	1,500	1,500
Classroom/Meeting Rooms	3	3	3
Multipurpose Room/Youth Projects Room	1	1	1
Population and Attendance			
Charleston Metropolitan Area Population	583,700	583,700	583,700
Attendance/Population Ratio	12%	15%	19%
Attendance			
On-Site Attendance			
On-Site Attendance	68,000	88,000	110,000
Ticketed Exhibit Admissions Attendance	54,400	70,400	88,000
School Attendance (included above)	20,500	26,000	33,000
School Attendance as % of Total Attendance	30%	30%	30%
Ticket Prices			
Adult Tix Price	\$ 8.00	\$ 8.00	\$ 8.00
Child Tix Price (Age 12 and under)	\$ 4.00	\$ 4.00	\$ 4.00
Average Ticket Price	\$ 4.00	\$ 4.00	\$ 4.00
Memberships			
Family Membership Price	\$ 45.00	\$ 45.00	\$ 45.00
Average Membership Price	\$ 40.00	\$ 40.00	\$ 40.00
Memberships	2.00%	2.00%	2.00%
Number of Paying General Memberships	1,360	1,760	2,200

Table 2

Source: White Oak Associates

Revenue Assumptions
 International African American Museum

REVENUE ASSUMPTIONS	LOW	MID	HIGH
Per Capita and Program Assumptions			
Museum Shop	\$ 1.30	\$ 1.30	\$ 1.30
Function Rentals:			
Number per Year	45	50	60
Average # people/event	75	100	150
Total # people per year	3,375	5,000	9,000
Average Rental Revenue	\$ 400	\$ 500	\$ 600
Gross per Capita - Catering	\$ 15.00	\$ 15.00	\$ 15.00
Catering NET per capita (8% of Gross)	\$ 1.20	\$ 1.20	\$ 1.20
School Programs in Addition to Exh Tix			
Yearly Program Attendance	3,000	7,000	12,000
Average Cost per Program	\$ 3.00	\$ 3.00	\$ 3.00
Public Programs: Camps/Classes/Workshops/Lectures in 3 classrooms			
Average # Attendees per Class Day	10	12	15
Number of Classes per Year	600	700	800
Average Revenue per Person /Program Day	\$ 7.00	\$ 7.00	\$ 7.00
Digital Family History Center			
Registration Fees	\$ 30.00	\$ 30.00	\$ 30.00
Percent of attendance Registering	1%	2%	3%
Outdoor Concerts and Events			
Attendance	10,000	15,000	20,000
Yearly Revenue - FREE	Free	Free	Free

Table 3
 Source: White Oak Associates

Earned Revenue

International African American Museum

EARNED REVENUE	LOW	MID	HIGH
	Stable Yr 4	Stable Yr 4	Stable Yr 4
Exhibit Gallery Admissions	\$ 217,600	\$ 281,600	\$ 352,000
Memberships	\$ 54,400	\$ 70,400	\$ 88,000
Museum Store	\$ 88,400	\$ 114,400	\$ 143,000
Classes, Camps, Workshops, Teacher Training	\$ 42,000	\$ 58,800	\$ 84,000
School Programs in addition to Exhs	\$ 9,000	\$ 21,000	\$ 36,000
Digital Family History Center	\$ 20,400	\$ 52,800	\$ 99,000
Special Event Revenue	\$ 50,000	\$ 60,000	\$ 70,000
Function Rentals	\$ 18,000	\$ 25,000	\$ 36,000
Catering Net Income from Functions	\$ 4,050	\$ 6,000	\$ 10,800
Miscellaneous	\$ 5,000	\$ 10,000	\$ 15,000
TOTAL EARNED REVENUE	\$ 508,850	\$ 700,000	\$ 933,800
Earned Revenue per Capita	\$ 7.48	\$ 7.95	\$ 8.49

Table 4

Source: White Oak Associates

Preliminary Operating Expenses and Staffing List

Operating expenses are based on a preliminary staffing list and functional expenses for the entire institution. In a future phase of planning, a salary survey needs to be conducted for the Charleston area and detailed line item expenses by department should be developed. Area salaries for managers earning \$50,000 or more were researched for other Charleston area museums and attractions.

Staffing List

For this top down operating model, benefits have been calculated at 24% for full-time employees and 10% for part-time. The staffing list is by no means generous. Staff will have to wear many hats. Volunteers should be used to supplement the staff in the exhibit galleries, helping with membership and special event mailings and in many other areas. Staffing and benefits, excluding contract labor, comprises 57% to 61% of total expenses, which is within standard industry ranges, though a little on the high side.

Contract labor will be used to deliver programs as well as for installation and takedown for traveling and other temporary exhibits.

Operating Expenses

Salaries and benefits will be the largest portion of the operating budget. Other high cost items will be advertising and marketing, exhibits (core and traveling/temporary), building costs and utilities.

Assumptions regarding traveling exhibits are that there would be three exhibits per year with two being in the medium-sized range with an average rental cost of \$50,000 and one being a blockbuster at an average rental cost of \$150,000. An additional \$100,000 is in the budget to cover other exhibit related costs for shipping, insurance, enhancement, etc. The budget also includes additional contract labor for installation and takedown. In some years IAAM may prefer to have fewer traveling exhibits and spend the balance of the funds for change and enhancement of the core exhibits.

There is also a small budget for community exhibits in the 500 SF Community Gallery, with an average of \$15,000 allotted for three exhibits per year. There is a \$50,000 budget annually to support the core exhibits, which are not expected to change dramatically from year to year.

Preliminary Staffing List

International African American Museum

	Estimated			Hours
	FT	PT	FTE	
Executive Director	1		1	2,080
Executive Assistant	1		1	2,080
Development/Membership Director	1		1	2,080
Dir of Finance and Admin	1		1	2,080
Exhibits & Programs Director	1		1	2,080
Technical Manager/Traveling Exh. Coord	1		1	2,080
Assoc Program Dir. & Program Assist	2		2	2,080
History Curator		1	0.5	2,080
Special Events Coordinator		1	0.75	
Training and Volunteer Coordinator	1		1	2,080
Mktg/Dev/Member Assistant	1		1	2,080
Marketing Manager	1		1	2,080
Gallery Attendants		4 to 6	1.5	2,675
Sales Manager-Schools and Groups	1		1	2,080
Sales Manager-Function Rentals	1		1	2,080
Store and Tix Cashier/Floor Staff		3	1.5	2,675
Facility Manager	1		1	2,080
Security		3	1.5	2,675
Custodial	1	1	1.5	2,675
TOTAL	15		21.25	

Table 5

Source: White Oak Associates

Preliminary Staffing Salaries
 International African American Museum

		Benefits	
		24%/10%	Total
Executive Director	\$ 90,000	\$ 21,600	\$ 111,600
Executive Assistant	\$ 32,000	\$ 7,680	\$ 39,680
Development/Membership Director	\$ 65,000	\$ 15,600	\$ 80,600
Director of Finance and Administration	\$ 58,000	\$ 13,920	\$ 71,920
Exhibits & Programs Director	\$ 60,000	\$ 14,400	\$ 74,400
Technical Manager/Traveling Exhibit Coord	\$ 55,000	\$ 13,200	\$ 68,200
Assoc Program Director & Program Assist	\$ 57,000	\$ 13,680	\$ 70,680
History Curator	\$ 25,000	\$ 6,000	\$ 31,000
Special Events Coordinator	\$ 21,000	\$ 2,100	\$ 23,100
Training and Volunteer Coordinator	\$ 30,000	\$ 7,200	\$ 37,200
Mktg/Dev/Member Assistant	\$ 28,000	\$ 6,720	\$ 34,720
Marketing Manager	\$ 55,000	\$ 13,200	\$ 68,200
Gallery Attendants	\$ 26,750	\$ 2,675	\$ 29,425
Sales Manager-Schools and Groups	\$ 28,000	\$ 6,720	\$ 34,720
Sales Manager-Function Rentals	\$ 36,000	\$ 8,640	\$ 44,640
Store and Tix Cashier/Floor Staff	\$ 37,450	\$ 3,745	\$ 41,195
Facility Manager	\$ 37,000	\$ 8,880	\$ 45,880
Security	\$ 53,500	\$ 5,350	\$ 58,850
Custodial	\$ 37,450	\$ 3,745	\$ 41,195
TOTAL	\$ 832,150	\$ 175,055	\$ 1,007,205

Table 6
 Source: White Oak Associates

Stable Year Operating Expenses
 International African American Museum

		Mid-Scenario		
Staff Costs with Benefits		\$ 1,007,205	38%	
Contract Labor for Programs	30%	\$ 17,640	1%	
Contract Labor - Exhibits		\$ 36,000	1%	
Accounting		\$ 15,000	1%	
Legal		\$ 12,000	0%	
Prof Fees/Services (Admin. Related)		\$ 20,000	1%	
Advertising/Marketing		\$ 250,000	9%	
Contingency/Misc		\$ 50,000	2%	
Dues and Subscript		\$ 5,000	0%	
Equipment Maint/Repair		\$ 25,000	1%	
Function Rental Expense		\$ 15,000	1%	
Insurance		\$ 50,000	2%	
Interest Expense		\$ 5,000	0%	
Membership/Development Exps		\$ 50,000	2%	
Office Expenses/Services		\$ 25,000	1%	
Supplies and Equipment		\$ 50,000	2%	
Outside Services and Internet		\$ 10,000	0%	
Postage and Freight		\$ 30,000	1%	
Printing		\$ 50,000	2%	
Professional Development		\$ 5,000	0%	
Special Events	55%	\$ 33,000	1%	
Store Cost of Goods	55%	\$ 62,920	2%	
Telephone		\$ 25,000	1%	
Travel/Conferences/Meetings		\$ 15,000	1%	
Programs and Program Supplies		\$ 20,000	1%	
Community Exhibits (3/yr)		\$ 45,000	2%	
Core Exhibits - minor changes/fixes		\$ 50,000	2%	
Traveling/Temporary Exhibits		\$ 250,000	9%	
Crate Storage (off-site)		for all		
Shipping				
Exhibit Supplies/Enhancement			\$ 100,000	4%
Exhibit Maintenance				
Exhibit Insurance				
Add'l Prof Fees for Blockbuster				
Utilities (\$/SF)	\$ 2.00	\$ 119,224	4%	
Grounds Maint	\$ 0.25	\$ 14,903	1%	
Building and Occupancy Costs	\$ 3.36	\$ 200,000	8%	
Custodial		in salaries		
TOTAL		\$ 2,662,892	100%	

Table 7
 Source: White Oak Associates

Summary Operating Budget

Operating Support

White Oak is not an expert in fund raising and it was not within this scope of work to conduct a fund raising analysis of the Charleston market to ascertain what level of annual support is achievable. The operating model indicates that \$1.36 to \$1.52 million annually will be needed to support operations, assuming net income that is only 1% more than expenses. This is in addition to the \$500,000 annual operating income being generated by the \$10 million endowment fund.

IAAM will need to have an experienced and strong development director in order to achieve these goals. The Executive Director will also have to devote considerable time to fund raising. Development directors are in such high demand they have been able to demand and get salaries that are significantly higher than average compared to other directors at the same level on an organization chart.

Summary Profile

Overall, earned revenue represents 21% to 32% of total revenues, which is appropriately conservative for museums with a history focus. The majority of museums operate with less earned revenue than support revenue. The exception is the science center industry that operates in the 40 – 60% earned revenue range with some, though few, achieving over 60% because of multi-ticketed venues such as an Imax® theater.

Expenses per building square foot range from \$39 to \$49 in the low to high scenarios. This is not an overly generous budget but reflects the realities of having to run museums on a tight budget.

Summary Stable Year Operating Budget

International African American Museum

OPERATING PROFILE	Low Scenario	Mid Scenario	High Scenario
<i>On-site Attendance</i>	68,000	88,000	110,000
Revenue			
Earned Revenue	\$ 508,850	\$ 700,000	\$ 933,800
Support Revenue	\$ 1,360,870	\$ 1,489,526	\$ 1,524,679
Revenue from \$10 Million Endowment	\$ 500,000	\$ 500,000	\$ 500,000
Total Revenue	\$ 2,369,720	\$ 2,689,526	\$ 2,958,479
Expenses			
Estimated Personnel Costs	\$ 855,950	\$ 1,007,000	\$ 1,107,700
Non-Personnel Operating Costs	\$ 1,490,307	\$ 1,655,892	\$ 1,821,487
Total Operating Expenses	\$ 2,346,257	\$ 2,662,892	\$ 2,929,187
Net Surplus	\$ 23,463	\$ 26,634	\$ 29,292
Operating Ratios and Data			
Staffing as % of Tot Costs	57%	61%	61%
Expenses per Bldg Sq. Foot	\$39	\$45	\$49
Earned	21%	26%	32%
Support	79%	74%	68%

Table 8

Source: White Oak Associates

Profiles of Other African American Museums

The following tables present data for a selection of other African American museums as well as projected data for IAAM. Looking at comparable museums helps provide operating parameters for new museums. Unfortunately, this is not as true for African American museums. African American museums, as a subset of all museums, are a fairly young group with a more limited track record. Many were founded or opened in the 1970's or more recently. In addition, compared to other museums subsets, like children's museums, science center or art museums, there is not a large database of institutions to compare to, and many of the African American museums focus on different areas — art, history, culture, and/or performing arts. Some are so new that long-term trends are not yet apparent. The National Underground Railroad Freedom Center opened in August 2004 (see following paragraph for additional information.). A new African American museum opened in Baltimore in June 2005. The Mohammad Ali Center in Louisville opened in November 2005. The African American Cultural Center in Pittsburgh will open in 2007. The Smithsonian's \$500 million National Museum of African American History and

Culture is in the planning stages and will be located at a prominent site near the Washington Monument in D.C. Opening year is currently projected at 2012. Other possible projects include a proposed \$200 million U.S. National Slavery Museum for Fredericksburg, VA which has support from Bill Cosby and former Virginia Governor Douglas Wilder.¹²

The National Underground Railroad Freedom Center in Cincinnati, according to a March, 2006 article¹³, has been struggling. It is \$5.5 million in the red and will be seeking public money to continue operations. According to the article, the museum indicated it needs an estimated \$2 to \$3 million a year in public funding to remain open. Its opening year operating budget was over \$10 million. Significant cuts have been made in staff and other areas to reduce annual expenses by about \$2 million. Although it exceeded its opening year attendance estimate of 260,000 by 20,000 the numbers fell dramatically after July of 2005. Note that it is unknown whether the museum opened with debt. The planning team strongly recommends that no debt be incurred in the building of IAAM. Very few museums can afford to pay debt out of annual operations unless they have unusual ancillary income from items such as a parking lot that might be used by others as well as the museum.

Some museums receive significant public funding. The Birmingham Civil Rights Institute receives approximately 40% of its funding from the city and another approximately 15% from the county. It conducted an economic impact study that showed that the institute generated more than \$8 million annually for the city. Museums need annual public funding in order to be sustainable. A 2005 survey conducted by the Association of Science-Technology Centers (which includes science centers as well as other museums.) on average received 26% of their funding from government sources. A 1999 report published by the American Association of Museums¹⁴ indicated government funding for its surveyed museums averaged 16%, down from 25% in 1996. Government funding as a percentage of total income was significantly higher for history museums. In the 1999 survey, the average percentage income from government sources for history museums was 36%, down from 46% in 1997 and 39% in 1996. With government funding decreasing, building an endowment fund as large as possible into capital campaigns is crucial. The Muhammad Ali Center in Louisville has a goal of \$20 million for its endowment fund.

Also reported in the AAM 1999 report was data on earned income. On average, earned income for history museums, as a percent of total income was 27% in 1999 and 31% in 1996. The category of history museums did not include historic houses and sites.

Table 11 includes ratios such as expenses per building sq. foot, which is a key ratio for museums, more so than spending per visitor. IAAM's projected expenses per building sq.

¹² "Competition Among Civil Rights Museums Makes Funds Hard to Raise," *Associated Press*, March 21, 2006.

¹³ "Underground Railroad Museum \$5.5 M in Red," *Seattle Post-Intelligencer*, March 15, 2006.

¹⁴ *1999 AAM Museum Financial Information, a Report from the National Survey.*

foot are in line, possibly a little low, compared to the other museums shown. Spending per visitor is very high for IAAM as it reflects the limited attendance potential. Obviously the more visitors, the lower the spending per visitor.

As shown in Table 9, there is a wide range of government funding as a percent of total annual operating income.

Selected African American Museums

International African American Museum

Museum Name	City	Year Founded, Open and/or Expanded	Estimated Government Funding
MLK Jr. Center for Nonviolent Social Change	Atlanta	1980	13%
Birmingham Civil Rights Institute	Birmingham	1992	50%
DuSable Museum of African American History	Chicago	1971/1993 Expand	52%
African American Museum	Dallas	1974 and 1993	32%
Museum of African American History	Detroit	1987 and 1997	49%
Tubman African American Museum	Macon	1985	51%
National Civil Rights Museum	Memphis	1991/2002 expand	15%
America's Black Holocaust Museum	Milwaukee	1988	4%

Table 9

Sources: American Association of Museum Directories, museum websites and tax forms 990

**Selected Data for Other African American Museums
 (Sorted by Metropolitan Population Size)**

International African American Museum

Name	City	FY of Data	Total Sq. Ft.	Exhibit Sq. Ft.	Total Attendance	Metro Population	Metro % Black Population	Ratio Attd to Metro Pop
DuSable Mus. of African American History	Chicago	2003	*	*	150,000	8,489,500	19%	2%
African American Museum	Dallas	2004	*	*	201,000	5,705,100	14%	4%
MLK Jr. Ctr for Nonviolent Social Change	Atlanta	2004	several historic bldgs		650,000	4,704,400	29%	14%
Museum of African American History	Detroit	2004	120,000	28,100	400,000	4,496,300	23%	9%
National Civil Rights Museum	Memphis	2004	40,000	*	160,000	1,250,400	45%	13%
Birmingham Civil Rights Institute	Birmingham	2003	58,000	29,000	141,000	933,100	30%	15%
Tubman African American Museum	Macon	2004	8,500	3,900	15,000	227,200	42%	7%
Average (excluding IAAM)			56,625		245,286	3,413,950	27%	9%
Median (excluding IAAM)			49,000		160,000	3,000,950	26%	9%
IAAM (high-scenario)	Charleston	2005	59,612	21,100	110,000	583,700	32%	19%
IAAM (mid-scenario)	Charleston	2005	59,612	21,100	88,000	583,700	32%	15%
IAAM (low-scenario)	Charleston	2005	59,612	21,100	68,000	583,700	32%	12%

Table 10

Sources: American Association of Museum Directories, individual museums, museum websites, Tax Forms 990, and White Oak Associates

* Note: Repeated attempts were made to collect missing data from the museums but calls and emails were not returned by all. Museums can receive one or more requests for data a week and are unable to respond to all requests.

Attendance at the Detroit museum includes outreach. Attendance at the Memphis museum is for exhibit admissions. On-site attendance would be more.

**Selected Data for Other African American Museums
 (Sorted by Metropolitan Population Size)**

International African American Museum

Name	City	FYE of Data	Bldg Sq. Ft.	FT	PT	Total Expenses	Admissions Revenue	Earned Revenue	Adult Tx Price	Exps per Bldg SF	Spending per Visitor
DuSable Mus. of African American History	Chicago	2003	*	21	21	\$ 2,337,704	\$ 216,139	\$ 812,618	\$ 3.00		\$ 15.58
African American Museum	Dallas	2004	*	15	2	\$ 1,154,133	Donation	\$ 514,602	Donation		\$ 5.74
MLK Jr. Ctr for Nonviolent Social Change	Atlanta	2004	*	20	5	\$ 3,407,238	Donation	\$ 1,645,828	Donation		\$ 5.24
Museum of African American History	Detroit	2004	120,000	33	17	\$ 6,611,460	\$ 170,797	\$ 1,336,777	\$ 8.00	\$ 55.10	\$ 16.53
National Civil Rights Museum	Memphis	2004	40,000	n/av	n/av	\$ 3,196,235	\$ 963,988	\$ 2,236,508	\$ 12.00	\$ 79.91	\$ 19.98
Birmingham Civil Rights Institute	Birmingham	2003	58,000	n/av	n/av	\$ 2,203,872	\$ 198,435	\$ 648,845	\$ 9.00	\$ 38.00	\$ 15.63
Tubman African American Museum	Macon	2004	8,500	15	20	\$ 795,602	\$ 22,851	\$ 129,985	\$ 5.00	\$ 93.60	\$ 53.04
Average (excluding IAAM)			56,625	18	11	\$ 2,530,216	\$ 267,763	931,824	\$ 7.00	\$ 66.65	\$ 18.82
Median (excluding IAAM)			49,000	18	11	\$ 2,270,788	\$ 184,616	730,732	\$ 6.50	\$ 67.50	\$ 15.63
IAAM (high-scenario)	Charleston	2005	59,612	15		\$ 2,929,187	\$ 352,000	\$ 933,800	\$ 8.00	\$ 49.14	\$ 26.63
IAAM (mid-scenario)	Charleston	2005	59,612	15		\$ 2,662,897	\$ 281,600	\$ 700,000	\$ 8.00	\$ 44.67	\$ 30.26
IAAM (low-scenario)	Charleston	2005	59,612	15		\$ 2,346,257	\$ 217,600	\$ 508,850	\$ 8.00	\$ 39.36	\$ 34.50

Table 11

Sources: American Association of Museum Directories, museum websites, tax forms 990 and White Oak Associates

* Note: Repeated attempts were made to collect missing data from the museums but calls and emails were not returned by all. Museums can receive one or more requests for data a week and are unable to respond to all requests.