



Proposal to Acquire McLeod Plantation

By

The Charleston County Park and Recreation Commission

May 14, 2010

Table of Contents

- I. Introduction**
- II. CCPRC Background**
 - A. Agency History
 - B. CCPRC Core Values
- III. Financial Qualification**
 - A. Annual Budget
 - B. Enterprise Approach to Revenue Collection
 - C. Capital Resources and Bonding Authority
 - D. Grants
- IV. Related Experience**
 - A. Experience with Cultural Properties
 - B. Experience with Conservation Easements
- V. Proposed Planning Process**
 - A. Planning Team
 - B. Steering Committee
 - C. Inventory and Analysis
 - D. Conceptual Master Plan
 - E. Final Master Plan
 - F. Schedule
- VI. CCPRC Proposal**
 - A. Proposed Usage
 - B. Proposed Programming
 - C. Public Access and Community Benefit
 - D. Terms and Conditions of the Offer

I. Introduction

When Mr. William Ellis McLeod bequeathed his one-third interest in McLeod Plantation to the Historic Charleston Foundation (“HCF”) upon his death in 1990, he expressed his desire for the property to be “protected by restrictive covenants” and to be preserved as “a single family residence, to preserve the Oak Avenues, and to provide that as much of the property as possible be restricted to single family residence or residences having the lowest possible density”. The Historic Charleston Foundation then wisely assembled the interests and parcels left to other beneficiaries in order to keep the property intact and protect it from development. With agreements in place making HCF the sole owner of McLeod Plantation, the Charleston County Park and Recreation Commission (“CCPRC”) was approached by HCF about potentially purchasing the property; although this was a desirable consideration for the Commission, they could not afford such a purchase at the time. Today, after the College of the Building Arts’ five year ownership and subsequent sale of the property back to HCF in 2009, and following the College of Charleston’s recently withdrawn bid to purchase the property, the CCPRC is in a position to submit a proposal to acquire the property.

McLeod Plantation’s convenient location and three century history as a working plantation provides a unique opportunity for the public to experience a well-preserved time capsule of the antebellum past within minutes of downtown Charleston’s historic district.

The complete assemblage of structures is like no other historic site in the area, with buildings ranging from the antebellum period through reconstruction.



II. Charleston County Park and Recreation Commission Background

A. Agency History

Originally created as the Charleston County Park, Recreation and Tourist Commission in 1968 by an act of the South Carolina legislature, the Charleston County Park and Recreation Commission that exists today serves as a special purpose district agency tasked with providing park and recreation services that are not otherwise provided by municipalities or other recreation Commissions. The legislative act creating the Commission establishes its purpose to “provide, maintain, and supervise park and tourist attractions including, but not limited to, fishing facilities, historical sites, marinas and boat landings, county parks, and public beaches”. In July 1985, the Commission’s tourism function was transferred to the Charleston Trident Chamber of Commerce. The park system emphasizes passive activities, outdoor recreation and environmental education. Each park facility offers a variety of educational programs that interpret the natural and cultural features of each site. Charleston County Park and Recreation Commission is committed to maintaining high standards in the delivery of leisure services and facilities to the citizens of Charleston County, as expressed in its mission statement: *The Charleston County Park and Recreation Commission will improve the quality of life in Charleston County by offering a diverse system of park facilities, programs and services.*

B. Core Values

CCPRC has adopted a set of core values, in an effort to ensure a thriving park system for generations of Charleston County citizens.

COMMUNITY ENRICHMENT

Enriching lives through education and programs

STEWARDSHIP

Preserving and conserving cultural, natural and historical resources

FUN

Delivering fun to customers

DIVERSITY

Fostering diverse populations of vendors, employees and customers

ACCESSIBILITY

Providing accessibility through affordable options and a variety of offerings

QUALITY

Striving for quality throughout the park system

HEALTH AND WELLNESS

Providing and promoting healthy lifestyle opportunities

EXCEPTIONAL CUSTOMER SERVICE

Always focusing on you

SAFETY

Ensuring safe and secure environments

LEADERSHIP

Providing professional staff development

BUILDING A LEGACY

Maintaining a vision for the future while sustaining a healthy park system

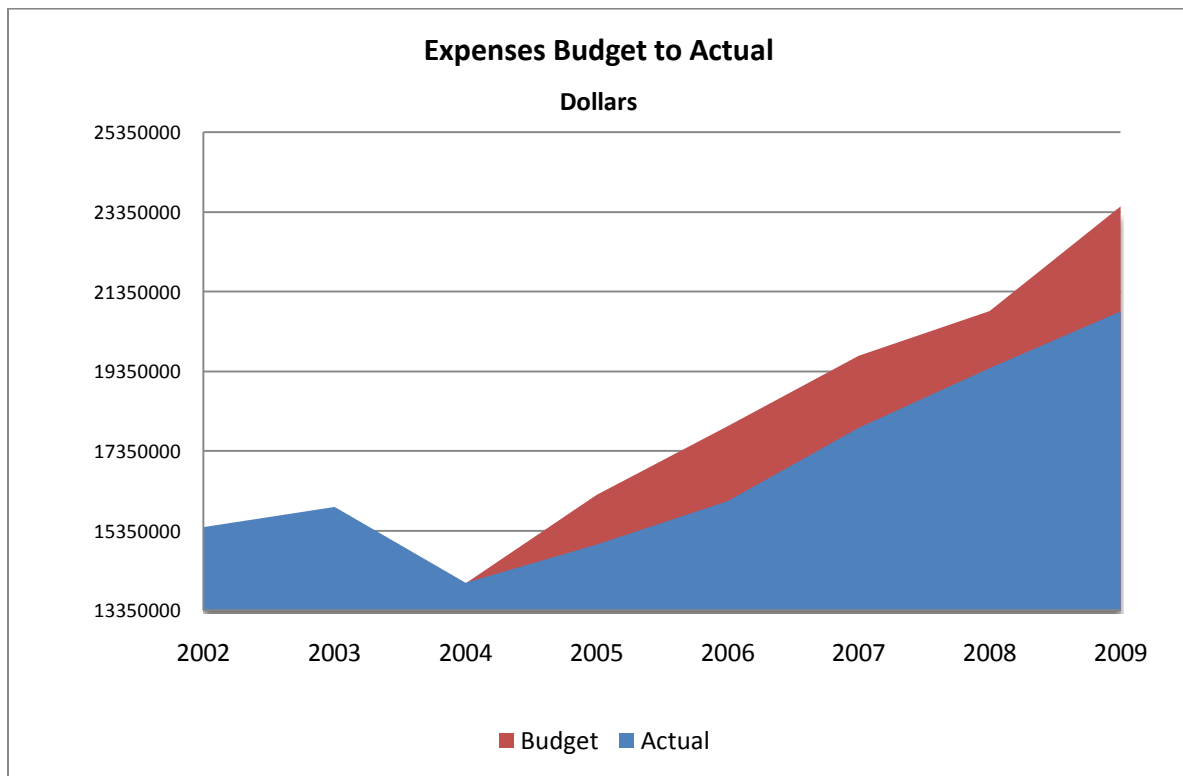
III. Financial Qualification

A. Annual Budget

The Charleston County Park and Recreation Commission prepares an annual budget that is first approved by its governing body, a group of seven appointed Commissioners, and then by Charleston County Council, which reviews and approves the necessary budget ordinances to levy tax millage for the Commission's operations. The Charleston County Park and Recreation Commission does not have legal authority to levy taxes.

The Commission takes pride in being an excellent steward of the resources placed in its trust by the taxpayers of Charleston County, concentrating on developing and operating its core park and recreation related programs and offerings. The operating budget growth the Commission has experienced has been a direct reflection of attendance and voluntary fees paid by the public to use the parks.

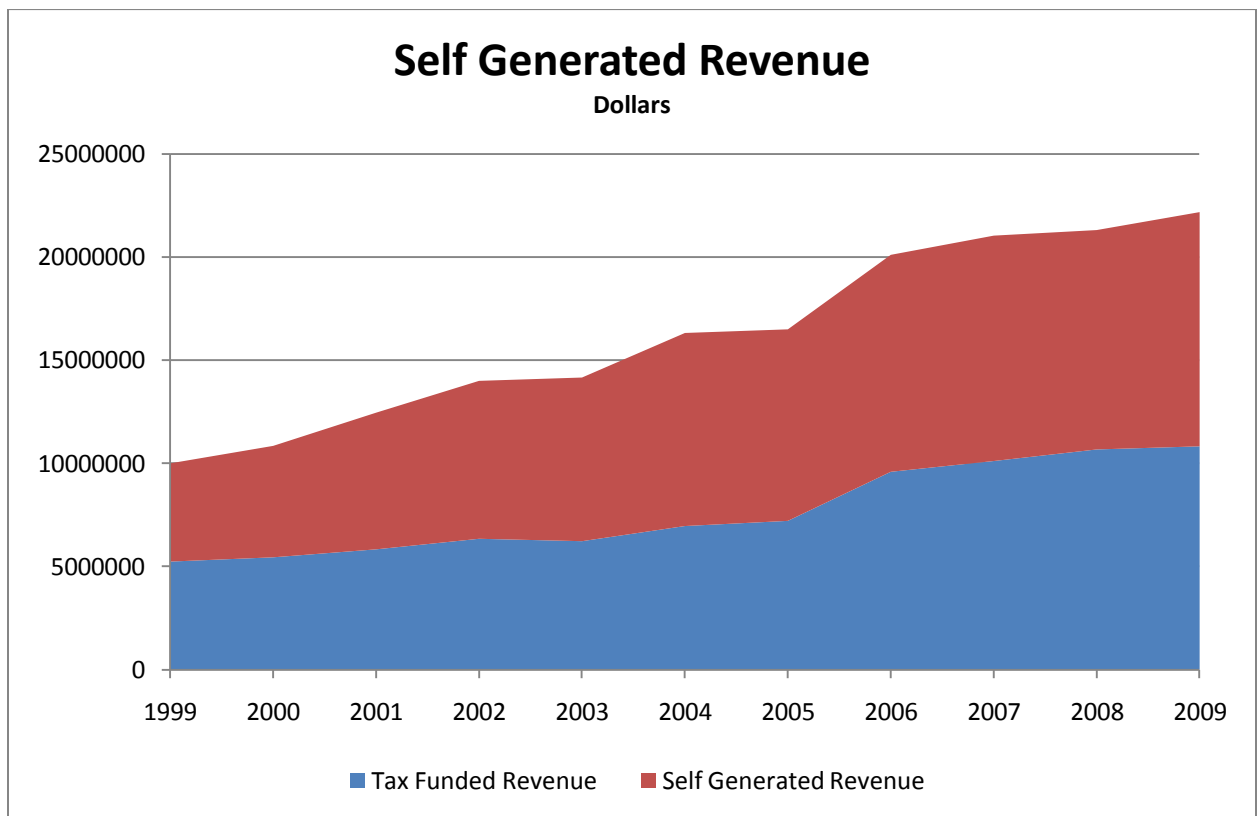
The Commission budgets its manpower requirements and other expenses based on an expected and historical level of use. When capable, the Commission will use fluctuations in these levels to reduce its direct cost of operations. This has created an operating surplus that has allowed the agency to channel funds into other areas of need within the agency without the need to pass these additional costs on to the taxpayer through a millage increase.



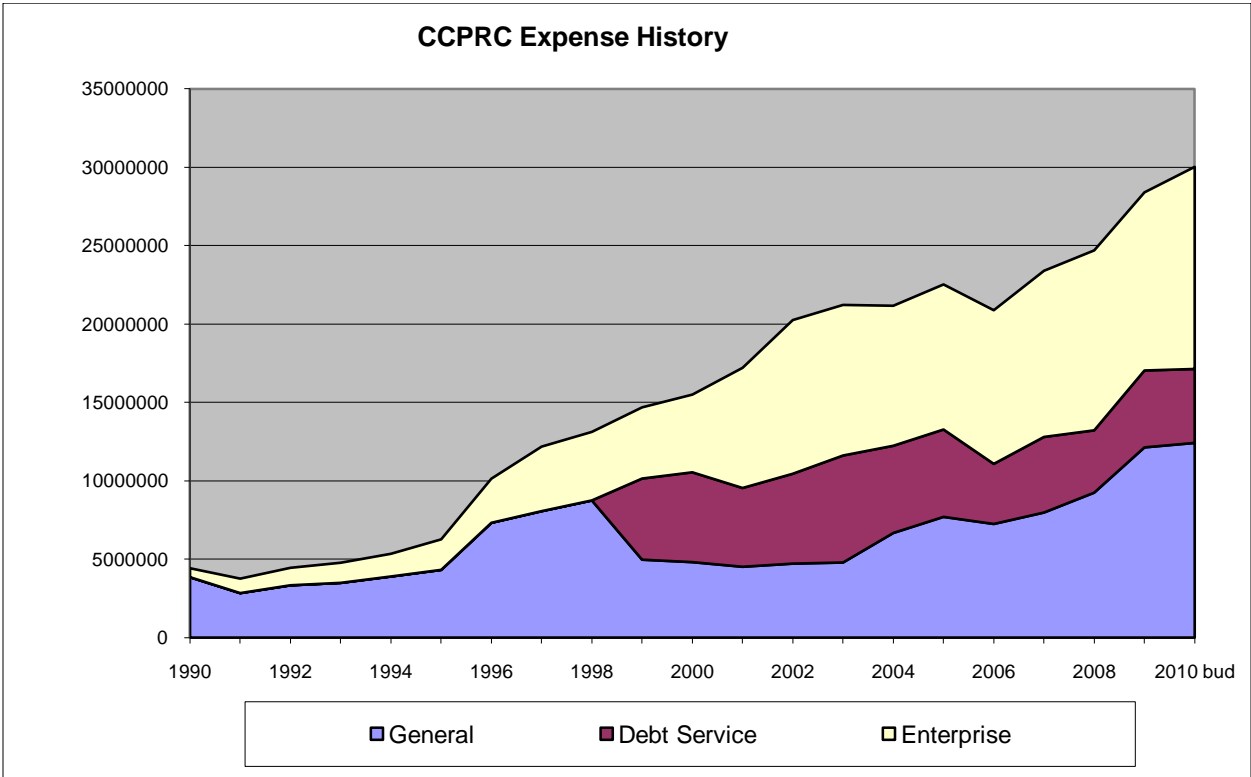
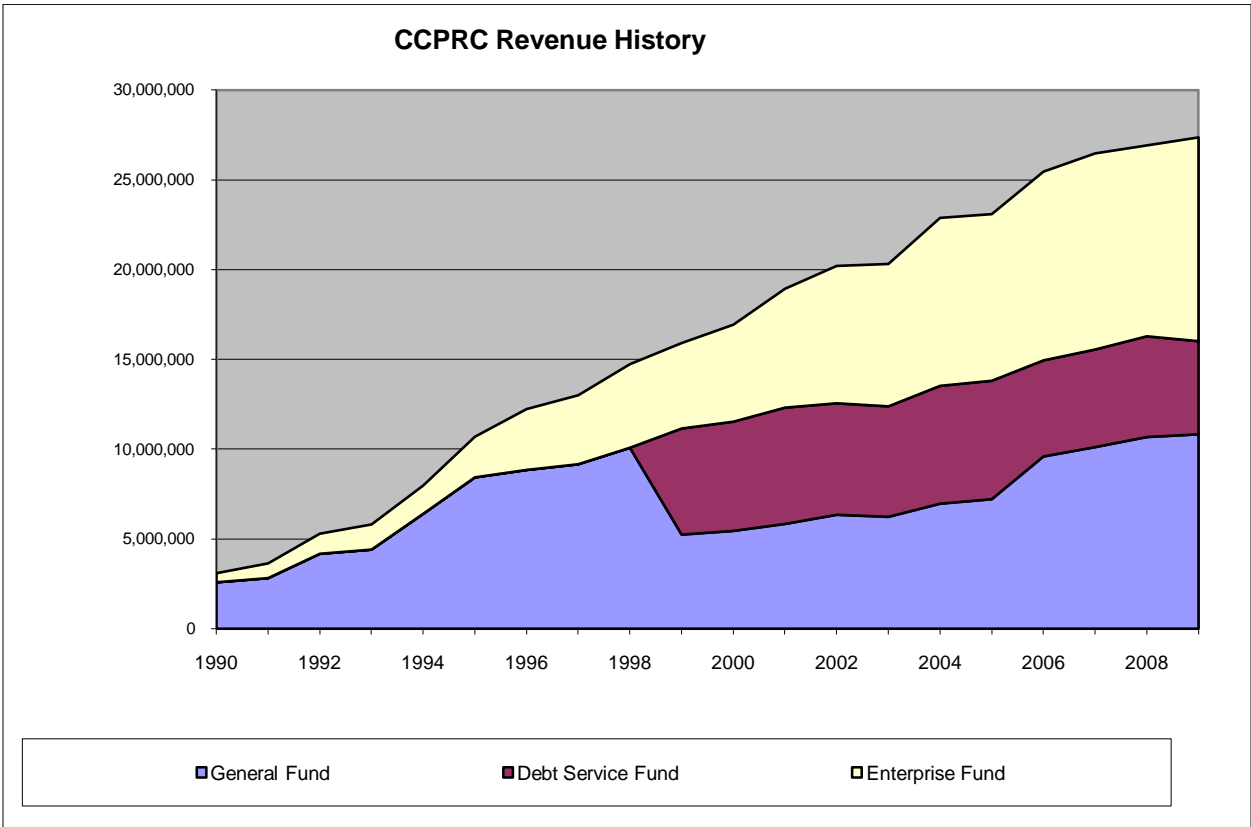
B. Enterprise Approach to Revenue

Through sound execution of its budget, the Commission has managed to control its expenses and live within the revenue received from all sources. While expenses continue to increase on an annual basis, CCPRC utilizes the “enterprise” approach, utilizing user fees for programs and services to generate revenue. This philosophy has enabled CCPRC to cover an average of 50% of the Commission’s operating funds over the last 10 years, even as costs have increased.

The following chart illustrates the growth of Commission revenues since 1990 as well as the growth of the relatively stable tax base being exceeded by the growth of its non-tax related revenues. The growth in tax receipts since 1997 has been due to the natural growth in development within Charleston County. All tax revenues received by the Commission are from local property taxes. CCPRC receives no sales tax revenue.



The percentage of operating revenue the Commission receives through voluntary user fees complements the tax millage received. Revenue has grown steadily through the years as new facilities and services have been added, resulting in increased park attendance. The Commission has not raised its property tax millage for thirteen consecutive years.



C. Capital Resources and Bonding Authority

The financial stability of the Commission is one of its primary goals. In order to continue operations through difficult economic times, which in its industry can be the result of inclement weather as well as a poor economy, it is imperative that the Commission maintain a level of reserves that will provide it with the financial ability to work through difficult circumstances. As Commission budgets and operating costs have increased, so have the appropriate levels of reserve funds.

The Charleston County Park and Recreation established a reserve policy that requires the Commission to maintain a financial reserve of between three and six months combined general fund and enterprise operating costs. The Commission currently has reserves in excess of this amount and has budgeted to use the excess funds for one time capital projects during the next fiscal year. At the end of FY 2011 CCPRC expects to have reserves in the mid-point of the specified range.

Additionally, CCPRC has a bonding capacity that is separate from that of Charleston County Government. Its ability to issue debt is subject to Charleston County Council approval. Its current bond rating from Standard and Poor's is AA+. The legal debt margin is the maximum amount that any government in South Carolina may issue without a taxpayer referendum. The current legal debt margin for Charleston County Parks and Recreation is in excess of \$200,000,000.

D. Grants

As a Special Purpose District created by the State of South Carolina, CCPRC can make application for Federal and State grants that can be used for various portions of the project. In addition to applying directly for these grants, CCPRC can partner with other non-profit organizations that are eligible to receive grants, but may not have the ability to manage a large project.

CCPRC anticipates seeking grants from grantors which may include the National Park Service, The National Trust, and South Carolina State Archives and History in order to leverage their own funding toward the restoration and enhancement of McLeod Plantation.

IV. Related Experience

A. Experience with Cultural Properties

Charleston County Park and Recreation Commission, as the owner of numerous cultural properties, recognizes the importance of protecting these important resources. Currently, New South Associates, a well qualified cultural resource consulting firm, is under contract to conduct a system-wide cultural resource inventory and prepare a cultural resource management plan to provide standards and guidance relating to cultural resources in the park system. If McLeod Plantation is acquired by CCPRC, the plan will address the treatment of historic structures by including this element in the management plan. CCPRC is committed to careful and appropriate planning in order to properly protect the cultural resources within its park system.

Many of CCPRC's properties contain National Register eligible sites, in periods ranging from prehistoric to colonial. Several have ties to the Civil War, slavery, and antebellum life, similar in importance to McLeod Plantation. The Caw Caw Interpretive Center, a former rice plantation, highlights both nature and history through the exhibits and programs offered there.



View of interpretive kiosk and observation deck at Caw Caw Interpretive Center

CCPRC would seek to highlight the connections between these park properties, as well as other historic sites in the Charleston area through educational programs and marketing efforts.

B. Experience with Conservation Easements

Conservation easements are currently held on three of Charleston County Park and Recreation Commission's park properties. The Nature Conservancy holds easements on two of these properties located in McClellanville and Edisto Island. The Nature Conservancy routinely monitors the properties for easement compliance. CCPRC has worked successfully with the Nature Conservancy since 1994 to meet management obligations that are required, such as preparing and implementing forestry management plans. As future park master plans are developed for these sites, CCPRC will seek approval from the Nature Conservancy to ensure that appropriate conservation values are upheld.

Additionally, a conservation easement is held with the State of South Carolina through the South Carolina Department of Natural Resources Heritage Preserve Program at the National Register of Historic Places listed Lighthouse Inlet Heritage Preserve (the former Coast Guard Base on Folly Island). Together with the State of South Carolina and a Steering Committee of other interested partners including the National Park Service, the United States Fish and Wildlife Service, the Civil War Preservation Trust, the Morris Island Coalition, and the National Trust for Historic Preservation, and others, an extensive year-long master planning process which also included public input was conducted. Through this process, a consensus was reached to develop an appropriate low-impact master plan and management plan for the property.



CCPRC recognizes the importance of limiting the use of these properties in the interest of protecting the natural and cultural resources. Creating the proper balance between the visiting public and these resources is a priority at all park properties. Our stewardship program includes a careful planning process to help determine the appropriate “carrying capacity” and use of each site.



Former rice field at Caw Caw Interpretive Center

V. Proposed Planning Process

Charleston County Park and Recreation Commission proposes to conduct a planning process prior to finalizing the proposed acquisition to determine what proposed uses and programs are appropriate for McLeod Plantation. CCPRC would be negligent to propose specific uses without first conducting the appropriate research and involving qualified consultants and stakeholders.

A. Planning Team

The first step in the planning process will be to assemble a qualified planning team to work with CCPRC, the Historic Charleston Foundation, consisting of a steering committee of stakeholders, and the public to facilitate the development of a Master Plan for McLeod Plantation. Other well developed and successful plans and studies for McLeod have been commissioned with capable consultants in the past by HCF and other groups. These former studies include the following:

1. Stabilization Assessment and Long Range Plan for McLeod Plantation
(October, 2009 Glenn Keyes Architects)
2. Proposed Restoration & Interpretation: McLeod Plantation
(October, 1999, Douglas W. Bostick, Sea Island Historical Society)
3. Feasibility Study for McLeod Plantation
(April, 1998 Cherry, Martin, Lee)
4. Conservation and Development Plan: McLeod Plantation
(October, 1991, Jaeger/Pyburn Inc., New South Associates, and Robert Charles Lesser & Co. for Historic Charleston Foundation)

These studies yield useful information, appropriate recommendations, and thoughtful conclusions. It will be CCPRC's intent to return to these previous studies to validate those earlier conclusions and explore new considerations. CCPRC also intends to retain the following consultants who have provided previous work relating to McLeod Plantation:

1. The Jaeger Company (Dale Jaeger, ASLA - lead consultant)
2. Glenn Keyes Architects
3. New South Associates
4. Robert Charles Lesser & Co.

B. Steering Committee

CCPRC recognizes that a number of groups have an interest in the future of McLeod Plantation. Therefore, CCPRC proposes to form a Steering Committee of interested parties, subject to approval by HCF, to provide input towards the development of a Master Plan. Conducting an open process and building partnerships will give credibility to the plan. Suggested groups to be represented include but are not limited to the following:

1. Historic Charleston Foundation
2. Friends of McLeod
3. Sea Island Historical Society
4. City of Charleston
5. Town of James Island
6. National Park Service - Gullah Geechee Corridor
7. National Park Service - Fort Sumter
8. College of Charleston
9. Avery Institute
10. American College of Building Arts
11. Civil War Preservation Trust
12. South Carolina Civil War Preservation Trust
13. National Trust for Historic Preservation
14. South Carolina Department of Natural Resources
15. South Carolina Department of Archives & History
16. US Fish and Wildlife Service
17. Public - James Island resident
18. Public - at large

C. Inventory and Analysis

The process would begin with the Planning Team first conducting an inventory and analysis of the property. Having a thorough understanding of the cultural resources, the natural resources, and the site conditions will provide guidance towards properly protecting the resources and helping to insure that any improvements to the site are appropriate. Drawing from previous studies, the Planning Team will then identify other

studies and fieldwork that are required to complete the inventory and analysis. In some cases, the previous studies may simply be updated. Data collection and mapping will be utilized to develop a complete cultural and ecological context of the property. The following studies will be drafted and synthesized, along with input from the Steering Committee, to develop a preliminary program for the site:

1. Archaeological Analysis
2. Ecological Analysis
3. Cultural Landscape Report
4. Historic Structures Report
5. Financial Feasibility Analysis
6. Web survey – public input

D. Conceptual Plan

In the Conceptual Planning Phase, the site program and treatment options will be refined with involvement from the Steering Committee. Several options may be explored, resulting in a consensus towards the best plan. Inventory and analysis findings and conceptual master plan options will be presented at public workshops. The following reports and programs will be developed:

1. Draft Historic Structures Report
2. Draft Cultural Landscape Report
3. Draft Site Program
4. Draft Interpretive Program

E. Final Master Plan

In this phase the final master plan will be developed for review and comment by the Steering Committee as well as the public. Other reports and plans will also be finalized, creating a clear vision for McLeod Plantation. The products presented will include the following:

1. Final Master Plan
2. Final Historic Structures Report
3. Final Cultural Landscape Report
4. Cost Estimates
5. Interpretive Plan

6. Marketing Plan
7. Operations/Staffing Plan
8. Management Plan
9. Appendices
 - a. Summary of Archeological Findings
 - b. Summary of Ecological Studies
 - c. Summary of Web Survey Findings

F. Schedule

A thorough planning process cannot happen quickly. CCPRC will do everything possible to expedite the process, but it is estimated that all proposed phases of work will take nine months.

1. Project Kick-off: **1 month**
 - a. Retain Planning Team
 - b. Assemble Steering Committee
2. Inventory and Analysis: **3 Months**
 - c. Steering Committee and public input
 - d. Preliminary fieldwork and studies
3. Conceptual Planning: **2 Months**
 - e. Steering Committee and public input
 - f. Draft studies and plans
4. Final Master Planning: **3 Months**
 - g. Steering Committee and public input
 - h. Final Master Plan and recommendations

VI. CCPRC's Proposal

A. Proposed Usage

Several groups, including HCF, The Friends of McLeod, and The Sea Island Historical Society have given careful thought as to how McLeod Plantation could potentially be utilized. It is CCPRC's intent to draw from these plans as a starting point for discussion to consider all appropriate uses. The Steering Committee will establish site goals which will provide a context for considering the potential uses for each structure, areas within the landscape and the landscape as a whole. An action plan will be developed for each structure, addressing required actions and proposed uses. CCPRC is committed to developing a thoughtful plan and making the necessary expenditures to stabilize, restore, and improve the property for the uses deemed appropriate by the Steering Committee.

B. Proposed Programming

The rich history of McLeod Plantation, and its complete collection of structures and landscape features provides for a variety of programming opportunities. The Steering Committee will consider all appropriate themes for interpretation, including the following:

1. Antebellum Sea Island Cotton Plantation Life
2. The contributions of the African slaves working on Sea Island Plantations and the Gullah Culture



3. The Civil War occupation at McLeod

The Civil War history at several of the CCPRC park properties provides an opportunity to connect each of these properties to McLeod Plantation. Most specifically, Lighthouse Inlet Heritage Preserve (formerly Coast Guard Base on Folly Island, formerly Fort Greene during Civil War) was home to both the 54th and 55th

Massachusetts volunteer regiments, just as McLeod Plantation served as a camp to these troops.

Similarly, Caw Caw Interpretive Center has an exhibit area highlighting rice culture in the low country, creating common story threads with slavery and other antebellum crops such as the Sea Island cotton grown at McLeod. The opportunity also exists to link other historic sites downtown and in the Charleston Harbor.

CCPRC currently has six staff members specializing in education and interpretation. It is anticipated that both passive and active interpretation would be utilized to communicate the interpretive themes. There are also opportunities to host activities and special events relating to the various themes.

C. Public Access and Community Benefit

It is obvious that the community feels very passionately about the future of McLeod Plantation. The strong ties that exist, whether they are held by descendants of slaves who lived and worked there or by those who drive past it each day, have helped to form support groups and advocates throughout the community. A common theme among those supporters is the need for public access. The basis of the CCPRC plan for McLeod will be to create a balance between public access and resource protection and to develop an appropriate plan through an open public process. As a public agency using public funds to acquire the property, CCPRC's ownership of the property would guarantee public access to McLeod Plantation in perpetuity.

CCPRC understands that the adjacent neighborhoods are especially interested in what may be planned at McLeod Plantation, and will make every effort to seek input and to appropriately address their concerns.



Spoleto temporary site art display by Martha Schwartz at McLeod Plantation fields

D. Terms and Conditions of the Offer

If the Historic Charleston Foundation Board accepts Charleston County Park and Recreation Commission's proposal, it is CCPRC's intent to negotiate the following terms in a purchase and sale agreement with The Historic Foundation of Charleston:

1. **Purchase Price:** The Historic Foundation of Charleston ("HFC") agrees to sell, and the Charleston County Parks and Recreation Commission ("CCPRC") agrees to purchase McLeod Plantation (the "Property"), for \$3,500,000. At the time of execution of the agreement, CCPRC will deposit earnest money in the amount of \$5,000.00 with Buist Byars & Taylor, LLC (the "Escrow Agent").
2. **Inspection Period:** Beginning on the effective date of the option agreement and continuing for a period of nine (9) months, CCPRC shall have complete access to the Property, for the purpose of conducting such studies and investigations as it may require. These studies shall include, but shall not be limited to, an archeological analysis of the Property, an ecological analysis of the Property, and an evaluation of the structures and landscape features located on the Property. Subject to the seller's contingencies below, CCPRC shall be entitled to extend the Inspection Period for an additional ninety (90) days, which shall also serve to extend the closing date. Prior to the expiration of the Inspection Period, CCPRC may elect to terminate the agreement, for any reason, and receive a full refund of the Earnest Money. If the CCPRC does not terminate the agreement prior to the end of the Inspection Period, the Earnest Money shall be nonrefundable.
3. **Contingencies:** Both HCF and CCPRC recognize and desire to protect the historical, archaeological, cultural and environmental significance of the Property, and to develop a conceptual master plan (the "Concept Plan") to address the protection of the site's resources, while providing appropriate public access to the Property. The Concept Plan will be developed at the sole cost and expense of CCPRC, but with input from HCF, appropriate experts and governmental agencies (the "Steering Committee"), and the public. CCPRC will provide HCF with monthly updates on the progress of the Concept Plan. At the end of the initial Inspection Period, HCF shall have the unilateral right to approve any request by CCPRC for an additional three month Inspection Period. HCF's decision shall

be based upon the progress made up to that point on the Concept Plan, and shall not be unreasonably withheld.

4. **Restrictive Covenants:** Certain restrictive covenants have been placed on the Property in accordance with the Last Will and Testament of William E. McLeod. If necessary, HCF agrees to modify the existing covenants at Closing, to allow implementation of the approved Concept Plan.
5. **Closing:** The closing shall occur within ninety (90) days of the end of the Inspection Period.