



The Waters Institute

Franklin County Underground Railroad/ African-American Heritage Tour

A Proposal for Funding

to

The Franklin County Hotel Room Tax Program

April 15, 2003

Revised Edition

Franklin County Underground Railroad/African-American Heritage Tour
A Proposal for Funding
Answers to application questions

1. List the name of your organization . . .

Org. name: The Waters Institute for African-American History, Inc.
Project name: Franklin County Underground Railroad/African-American Heritage Tour
Municipality: Chambersburg, Mercersburg
Contact: James Wolfson
610 Philadelphia Avenue
Chambersburg, PA 17201
(717) 263-0531, djw@cvn.net

2. How does your event enhance . . .

This project enhances historical and cultural attractions in Franklin County, as it draws the specific attention of visitors local groups of adults and students. It does so in several ways: the tour and its sites will be advertised as never before, attractions will be explained in an entertaining way by experienced guides, and tours will contain special simulations related to the experience of fugitive slaves, providers of aid and comfort, and captors. A VHS media presentation will take place on the tour busses, based on the oral history of African-Americans in Franklin County. Finally, we plan to convene discussion groups after the tour.

3. How does your project enhance tourism . . .

- a) There is increasing in the study of the Underground Railroad and African-American History across America. Large museums (Cincinnati, Ohio) and small museums (Frederick, Maryland) are opening. On February 28, the National Museum of American History held a full day program on the Underground Railroad and houses permanent exhibits on many African-American issues. The Pennsylvania Historical and Museum Commission has created an office to coordinate Underground Railroad studies across the Commonwealth. Further, the National Park Service has established an Underground Railroad District that encompasses all of our area. These facts matter when considered in light of paragraph b), below:
- b) There are no existing Underground Railroad tours in South Central Pennsylvania to meet this interest. Franklin County has enough related attractions to make such a tour feasible for the very near future. The presence of the Waters Institute and its research capabilities insures that appropriate

knowledge about the attractions is disseminated, and more important, discussed by tour participants.

- c) As a heritage tour, this project attracts a targeted audience, which is extremely important in difficult economic times.

The project has great benefit to local residents, as well.

- a) The pilot testing effort (see Appendix B), in which community efforts will become the first tourists and supply feedback on its every aspect, has benefits that go beyond any tourist business. They are important to the Waters Institute' community building ideal. We intend to solicit the community for ideas on important sites and stories, for their opinions on our progress, and for their participation as our first heritage tourists. We will accomplish these activities through public hearings, meetings at community centers, and inviting all members of the community to experience our tours. We hope to involve community members in taking responsibility for helping maintain our sites in excellent condition.
- b) A further benefit of our intended level of community participation is that participants will become more familiar with the Underground Railroad and its important lessons for all of us. Additionally, we will use only Franklin County contractors when appropriate. The participation process matters, as well. Participation will bring us all closer together and create the trust necessary to continue the mission of the Waters Institute. We hope that the result will be that community members and outside visitors will feel that the tours are sponsored by the communities of Franklin County through its own vehicle, the Waters Institute. If we are successful in our efforts in building Franklin County heritage tours, we will have "secured investment of the hearts and minds of community members in the endeavors of the Waters Institute," a critical part of our own mission.
- c) Additionally, the tours will bring new dollars to Franklin County, its merchants, and its cultural resources. Early support of this project will not simply build a foundation for future tourism, it will have an immediate monetary return. According to statistics obtained from the *Pennsylvania Heritage Tourism Study*, prepared by D.K. Shifflet (1999), the heritage tourist spends just over \$120 per day on heritage tours. This number rises to \$131 per day when he or she takes the 1-day tour (see budget calculations, Appendix A). Consultations with local and national tour operators indicate that it would not be unreasonable to attract 500 participants in the first year of service. We will use 400 as the basis for our budget calculations.

4. Briefly explain the purpose of your organization or project.

The Waters Institute for African-American History, Inc. was incorporated on August 29, 2002, to determine the significance of African-American History in the development of Franklin County and the Underground Railroad. It is to undertake a community building effort through the performance of charitable and educational acts that create a sense of mutual investment and trust between the community and the Institute, and to educate visitors in a manner that will promote multicultural goodwill and the accompanying social progress that can be expected to result.

The purpose of this project is consistent with the community building mission of the Waters Institute. We believe that the Waters Institute belongs to its community. We strive to create an investment of the hearts and minds of community members, as we work to unite community members through our variety of local services, and to our Commonwealth and nation. The heritage tour project provides another opportunity for community involvement in its planning, testing, and maintenance. When the community takes advantage of this opportunity, we know it is a source of self-confidence, pride, among community members, consistent with our mission:

We seek to preserve and make public physical and intellectual properties that are historically significant to the African-American community and the Underground Railroad in Franklin County.

We seek to create an interactive experience for visitors to these properties, and to Franklin County, in order to create the feeling of what it was like to be alive during the periods under study.

We seek to secure investment of the hearts and minds of community members in the endeavors of the Waters Institute through programming that creates an understanding of the linkage between our community history and the personal backgrounds of its members.

We seek to illustrate the shared cultural heritage created by participants in the Underground Railroad so as to present our visitors with the opportunity to understand the lessons inherent in the events that constitute that heritage, including those concerning freedom, hope, dignity, and social justice.

5. How much grant funding do you need? . . .

We seek a total of \$19,228. A complete budget is provided in Appendix A to this proposal, along with a narrative, Appendix B, that explains the

background, proposed operations, and development timetable of this project. The requested funding is to be used for start-up operations for a Franklin County Heritage tour. It will cover research to develop tour sites and scripting for our guides, pilot testing of the tours among community members, a small subsidy if it is decided to run some early tours at a loss, and the first-year marketing cost needed to develop a solid business. It is an important advantage that we have control over the profitability of every tour, because all operating costs and the proposed revenue are known in advance. Thus, it can be decided whether or not to run any tour with less than a breakeven number of tourists. We can either make sure that any given tour is profitable or we can work below the breakeven level, especially with new tours, if we determine that to be necessary to help promote the service. We have sought only Franklin County funding for the heritage tour package, although elements of the package, including various historical markers have been funded in the past. The oral history project, that will be used as part of the tour, has a pending grant request of \$3,000.

6. If you are awarded a grant, do you currently have the financial/volunteer means...

Yes. This proposal is evidence in itself that the planning and leadership functions are being staffed. Community volunteers will act in a pilot testing capacity. The Waters Institute, a volunteer organization will provide the administration. CCIA will volunteer the buses for the pilot tests. The true financial need is for subsidizing the pilot testing, marketing to make the project competitive in the "outside" world, and for professional research to ensure the integrity of the tour sites, as specified in the budget. The marketing program, should yield benefits beyond the first year, although it is considered a startup activity.

7. If you are applying for capital improvement . . .

We are not applying for capital improvement funding.

8. Have you discussed your project with the municipality it is located in?

Yes. Our project affects both Chambersburg and Mercersburg. We have gained the enthusiastic support of both borough councils. No permitting or zoning changes will be required for this project.

See next page for Appendices A and B

Appendix A

Waters Institute Heritage Tour Project

1. Budget to Develop Heritage Tour			
(Startup Cost Profile)			
Data Gathering - candidate sites (5 hrs per site, 20 sites, @25/hr)			2,500
Data Evaluation/Editing and final site selection (20 hr. @25/hr.)			1,500
Scripting -12 sites (24 hr. @25/hr.)			600
Simulation (6 hr. @25/hr.)			150
Final Site Selection (5 hr. @25/hr.)			125
Tour walkthroughs/rehearsals (15 hr. @25/hr.)			375
Pilot Testing			
<i>Using community members to experience and evaluate the tour</i>			
Gasoline (3 buses of 25 @\$50)		150	
Lunch (3 groups of 25 @6)		450	
Evaluation (staff labor)		<u>225</u>	
(9 hr. @25)			825
Marketing - planning for outside visitor tours, creation of awareness)			
(=20% of min. revenue)			3,200
Marketing - loss prevention subsidy if first 5 tours are less than breakeven			
<i>If operations yield only 11 buses@17 people</i>			
Total Revenue		7,480	
Vehicle Cost	5,500		
Tourguide cost	1,925		
Special effects	660		
Admin.	748		
Total Cost		<u>8,833</u>	
Subsidy required			1,353
Marketing - Advertising Media			5,000
Promotional Materials (400 T-shirts or similar premium)			3,600
Total			19,228
<i>Note: The heritage tour program may choose to become a subcontractor to a</i>			

commercial tour operator. The project risk would diminish, but the returns would be lower, and the above marketing outlays for the loss prevention subsidy, and perhaps half of the marketing planning advertising will not be necessary.			
The budget will be reduced to:			11,275
If this amount is budgeted, however, it will reduce the freedom of the heritage tour planners to choose the very best marketing program.			
Thus, the initial budget request remains at \$19,228, with the option of returning \$7,953 to the funding agent.			

2. Spending Analysis* - Individual Heritage Tourists	
<i>Typical Spending Profile*, per person</i>	
Food/Drink	30
Shopping	28
Accommodations	22
Entertainment	16
Transportation	14
Misc.	11
	121
*per Pennsylvania Heritage Tourism Study, D.K. Shifflet & Assoc., 2001	
Net additional outlay for Heritage Tour - Visitor from Metro area (includes \$25 transportation allow. to reach Franklin County)	35
3. Heritage Tour Budget - Background	
Revenue per tour:	
<i>(The minimum acceptable volume is 35 people per tour, and we expect 11 tours for the first year)</i>	
Proposed single fare	40
Revenue-35 person tour	1,400
Min. #people needed for tour	35
Cost per tour:	
Daily charge for vehicle	500
Daily charge for tourguide	175
Special effects per tour	60
Admin. Support	10%
<i>Tour operator's per person cost/revenue profile</i>	

<i>At minimum volume - 35 people, per person amounts:</i>		
Revenue		40
Less:		
Vehicle Charges	14	
Tourguide	5	
Special effects/materials	2	
Admin. Support	4	
Total Cost		<u>25</u>
Operating Margin		15
(No. tours @35 people)		11
Annual Operating Margin		6,000
Breakeven Analysis for single tour:		
Revenue/person	40	
Cost/person	0.1	
Fixed cost	735	
Breakeven point (people)	20	

Appendix B

**Grant Application to
The Franklin County Hotel Room Tax Program**

Application for Funding of Heritage Tours

*For the enhancement and exhibition of the cultural
and historical resources of Franklin County*

Background Narrative

Prepared by:

The Waters Institute of African American History, Inc.

In Collaboration With

Chambersburg Community Improvement Association

Chambersburg, Pennsylvania

February 28, 2003

Introduction

The Waters Institute for African-American seeks to provide heritage tourists with on and two-day tours of Franklin County's historical attractions that highlight Underground Railroad activity and local African-American History. Preliminary studies commissioned by several Pennsylvania government agencies indicate that:

- The demand for this specific segment of tourism is rising.
- It is not difficult to identify target markets.
- There is increasing in the study of the Underground Railroad and African-American History across America. Large museums (Cincinnati, Ohio) and small museums (Frederick, Maryland) are opening. On February 28, the National Museum of American History held a full day program on the Underground Railroad and houses permanent exhibits on many African-American issues. Further, the National Park Service has established an Underground Railroad District that encompasses all of our area.
- The combination of Franklin County's attractions, enhanced by the research undertaken by the Waters Institute makes a memorable tour that will have considerable impact on subsequent tourist activity.
- The tours will bring new dollars to Franklin County, its merchants, and its cultural resources. Early support of this project will not simply build a foundation for future tourism, it will have an immediate monetary return. According to statistics obtained from the *Pennsylvania Heritage Tourism Study*, prepared by D.K. Shifflet (1999), the heritage tourist spends just over \$120 per day on heritage tours. Consultations with local and national tour operators indicate that it would not be unreasonable to attract 500 participants in the first year of service. (grouped in 11 tours @35 people)

The term "heritage tourism," according to agencies of the Pennsylvania government, describes leisure trips undertaken by individuals with the primary purpose of visiting historic, cultural, natural, recreational and scenic attractions to learn more about the past in an enjoyable way. The Waters Institute Franklin County tour package has been designed to attract heritage tourists of this profile, with the additional goal of teaching the lessons of the specific history experienced. In this proposal, we seek to illustrate the need for an orderly and disciplined development of tours that benefit the County's economy directly, and contain a built-in marketing benefit that will help create further economic growth and education that will reinforce the value of the education provided to today's visitors.

Conceptual Development

A heritage tourism program, especially when it involves the Underground Railroad and African-American History in Franklin County, must have the support of as much of the communities involved as possible. The first tourists must be community members themselves. Not only are their insights invaluable, but they must develop a sincere desire to be hospitable when visitors, many from cultural backgrounds other than their own, come to visit their communities. This is an obvious statement regarding shops and restaurants, but it is also clear that tourists can feel the hospitable mood or lack of same among the community at large when it exists. Additionally, we believe that the Waters Institute belongs to its community. We strive to create an investment of the hearts and minds of community members, as we work to unite community members through our local services, and to our Commonwealth and nation.

A tourism program is developed through a variety of steps, followed by pilot testing in the community and with professional marketers whose demographic targets are in nearby metropolitan areas or outside regions. Of course, early tours will be under close scrutiny for enhancement and improvement needs. The need for monitoring will be everlasting.

The pilot testing effort in the community has benefits that go beyond any tourist business. They are important to the Waters Institute' community building ideal. We intend to solicit the community for ideas on important sites and stories, for their opinions on our progress, and for their participation as our first heritage tourists. We will accomplish these activities through public hearings, meetings at community centers, and inviting all members of the community to experience our tours. A further benefit of our intended level of community participation is that participants will be come more familiar with the Underground Railroad and its important lessons for all of us. Additionally, we will use only Franklin County contractors when available. The participation process matters, as well. Participation will bring us all closer together and create the trust necessary to continue the mission of the Waters Institute. We hope that the result will be that community members and outside visitors will feel that the tours are sponsored by the communities of Franklin County through its own vehicle, the Waters Institute. If we are successful in our efforts in building Franklin County heritage tours, we will have "secured investment of the hearts and minds of community members in the endeavors of the Waters Institute," a critical part of our own mission.

Practical Development

The Tour Package – The Franklin County heritage tour proposed herein is a one-day, Saturday, tour of approximately seven hours that includes the opportunities to shop and have lunch at one stop that affords a choice of restaurants or picnic sites. A professional tour guide will ride with each group and there will be excerpts from our Chambersburg oral history tape shown en route.

The proposed route will be almost a geographical loop that begins at the junction of Interstate 81 and U.S. 30, where we will arrange for parking for out-of-town visitors. It will begin with a visit to several sites in Caledonia and a simulation of the fugitive slave experience in the State Park. Tour participants will then move West along U.S. 30 to sites in Chambersburg, Peters Township, Cove Gap, and Mercersburg. There will be a lunch and shopping opportunity in downtown Mercersburg. The group will proceed to Greencastle for a history discussion and shopping. They will return to Chambersburg for a shopping and snacking experience, and then return to the parking area. They will be encourage to patronize Chambersburg restaurants for dinner and we will offer an overnight accommodations reservation service, should participants desire to stay. We will also provide the opportunity for group discussion in the evening and group meals, if desired. Participants will be invited to local houses of worship on Sunday morning, along with a free brunch and an opportunity to discuss the tour with local community members. The total package price for the tour is \$40.00 per person. Pilot testing with local citizen groups will allow us to determine the proper allocations of time to each site and the number of sites.

The following steps are necessary to the development of a tour that will meet the standards of the Waters institute and gain community participation and approval. The basic elements of the each step do not vary. All research and marketing services are to be provided by professionals and invoiced appropriately. The steps are:

- **Data Gathering** – determination of a list of potential sights and the factual matter that describes them
- **Evaluation and Editing** of factual matter into presentation guidelines. Community members will be invited to participate.
- **Scripting** – development of “tight” guidelines for presentation by our guides. Guides will not be limited to simply presenting facts.
- **Simulation** – Community members will be invited to participate in evaluating simulated tour elements, including sites, experiential exercises, and eating arrangements.
- **Selection** – Final selection of sites and tour length options must be made when all evaluations have been completed. But, this work remains on paper. The next step is critical.
- **Pilot Testing** – Community members will be invited to take the tours. Their feedback, developed in local forums, will serve to shape future tours. We expect several iterations of pilot testing, in order to meet both quality and community “investment” objectives.

- **Marketing** – We will market outside the community only when we are satisfied with the product. At that time, we will seek the services of specialists in the field of tour planning and operation. Business arrangements at this juncture may include cooperative efforts between Waters and the chosen parties, contracting by either party (one supplies a service to the other, such as the provision of guides or vehicles), or strictly the employment of consulting and marketing and advertising services by the Waters Institute.

Marketing materials contemplated for use regarding heritage tours include a Web site, already under development, set of brochures for specific purposes, promotional items that will be sold, including t-shirts, DVD disks from our oral history project, and tapes and disks of performances by the group *Seven Local Women*.

Additionally, we expect to entertain our guests on the tour busses with video selections from our oral history project.

- **Choosing a Staff** – The project staff will include an administrator and one or more guides. The Institute will not own vehicles or any capital items that may be considered as assets serving only the tourist activity.

The administrator will be responsible for supervision of the guides, community involvement, budgeting, accounting, management of the marketing function, stocking marketing materials, scheduling of tours, evaluation of tours, and quality control.

Guides will be responsible for mastery of subject matter and entertaining presentation. They will be paid a single fee for each tour they serve. They are expected to participate in the solicitation of tourist feedback and to aid in the analysis of that feedback.

- **Execution of Heritage Tours** – We expect to offer one and two-day tour options. We plan to ask outside visitors to drive to a central location and then board our bus for the tours, but this plan is subject to scrutiny as part of our marketing operation. We must also evaluate options for lunch, shopping, overnight accommodation, tour length and number of stops, and experiential exercises, such as dining on “period” foods, fugitive escape participative simulations, everyday living simulations, and the celebration of specific lives of those buried in the cemeteries on the tour.
- **Monitoring, Feedback, and Guidance** – Feedback will be collected by guides and from the community and the vendors who interface with our tourists. The analytical work will be carried out by the administrator, the guides, and the community (perhaps represented by a committee or board). We have outlined

the sources of feedback above. Careful consideration of the implications of that feedback will be undertaken by this group.

Budget

The budget represents the first fiscal year of operations of heritage tours. The budget appears on page 6 of this document.

Timetable

We expect to operate the pilot test tours during June, 2003, so that we can operate the visitor (outside Franklin County) tours from July through November of 2003. We will begin again in March or April of 2004. The steps we expect to undertake appear above and the budget for those steps appears in Appendix A. The major variable is the effectiveness of the marketing program. Considerable budget dollars have been allocated to this effort, hopefully to cover the uncertainties created by today's rapidly-changing environment.