South Carolina

# Conservation and Development Plan

## McLeod Plantation
## James Island, South Carolina



Historic Charleston Foundation

Jaeger/Pyburn, Inc.

HUBERT BOND OWENS
READING ROOM
SCHOOL OF ENVIRONMENTAL DESIGN
UNIVERSITY OF GEORGIA

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# McLeod Plantation
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**Historic Charleston Foundation**
**Charleston, South Carolina**

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**Jaeger/Pyburn, Inc.**
Gainesville, Georgia
*Historic Preservation, Landscape Architecture, Architecture, Planning*

**New South Associates**
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*Archeology*

**Robert Charles Lesser & Company**
Atlanta, Georgia
*Real Estate*

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# 1.0 Introduction

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# 1.0 Introduction

The McLeod Plantation, an approximate 50 acre site located on James Island, South Carolina, has been described as a site that "has everything." It has been called "a fully represented settlement," due to its prehistory and seventeenth, eighteenth, and nineteenth-century artifacts. The site has been identified as among the top 100 archeological sites in the state by the South Carolina Heritage Trust.

The site is a tangible vestige of the south's cotton economy. Its history as a Sea Island Cotton Plantation is reflected in the antebellum plantation house, the slave row, the cotton gin house, its river location, and the surviving agricultural fields. The site is the only intact plantation located within the corporate limits of the City of Charleston.

The site conveys a variety of perspectives in black culture. The slave cottages document the experience of slavery. The site's use as a freedmen village and the extant archeological artifacts associated with this transitory use of the site reflect the early days of freedom for the south's black population. Blacks continued to inhabit McLeod as a part of the plantation's workforce and continued to live in the former slave housing well into the twentieth century. The continued burials of blacks at the site's cemetery until approximately 20 years ago makes this burial ground an important site in black history of James Island.

McLeod Plantation is a unique resource within the James Island community. It is a visual landmark that many of the Island's 33,000 residents take note of each day as they travel to the city on Folly Road. McLeod Plantation is an anomaly in a commercialized and suburbanized area. It is located adjacent to the Island's busiest intersection at Maybank Highway and Folly Road. It has been described as the "last tract," considered to be the one surviving open space in an area of intensive development. It is a tract that is attractive for development. It is located on water. The Charleston Country Club with its golf course and upscale housing is situated on an adjacent tract. The site has access to a variety of commercial services.

The Historic Charleston Foundation (HCF) is the beneficiary of one-third undivided interest in the McLeod Plantation property. This interest was given to the Foundation by Mr. William E. McLeod, the last surviving McLeod heir in the three generations of McLeods who have inhabited this site since 1851. Prior to his death on January 19, 1990, at 105 years of age, Mr. McLeod realized that the future of this intact historic site was threatened. His two sisters had left their share in the property, the remaining two-thirds ownership, to 12 other nonprofit agencies and institutions. Mr. McLeod assumed that if he did likewise and distributed his ownership to his favorite charities, at his death the plantation

would be subdivided arbitrarily and the parcels sold to fulfill each group's ownership claim.

Mr. McLeod with legal assistance and the interest of the Historic Charleston Foundation decided on an approach that had the potential of preserving the plantation site or at least a portion of it. Mr. McLeod, in leaving his entire ownership share to the HCF included in his will the following directive, "I direct that Historic Charleston Foundation, Inc. place restrictive covenants on as much of the above described real property as possible so as to preserve the single family residence, to preserve the Oak Avenues, and to provide that as much of the property as possible be restricted to single family residences having the lowest possible density. How this is to be done shall be left to the best judgement of the Historic Charleston Foundation, Inc."

Historic Charleston Foundation determined that a land plan was needed to guide the future of the property and as a tool for valuation. In January 1991 HCF issued a Request for Proposal for the "preparation of a comprehensive plan for a conservation/development of the McLeod Plantation site." This report outlines the recommendations of that plan. In this study the unique cultural assets of the site and the future real estate development options have been considered simultaneously. The project has brought together the disciplines of Landscape Architecture, Architecture, Historic Preservation, Archeology, and Real Estate. Project team members have attempted to balance cultural conservation and economic development. The dual goals of this plan are to develop a preservation plan which maintains the standing structures and other significant landscape and archeological resources at McLeod Plantation while also devising a strategy whereby outlying portions of the plantation can be identified for developed, thus offering the potential of generating revenues. The revenues, in turn, can be used in the preservation of the site's significant, historic core.

The report includes the following sections: (1) Historical Research; (2) Inventory and Analysis of Existing Conditions; (3) Delineation of the Preservation Boundary; (4) Market Analysis; (5) Development Options/Layout; (6) Development Options/Financial Analysis; (7) Development Options: Evaluation; and (8) Preferred Development Plan.The Historical Research section documents all aspects of the site's history. Themes important in the site's evolution include archeology, agriculture, architecture, landscape architecture, and black history. The Inventory and Analysis section reports on the physical characteristics of the site and regulatory constraints. Based on the findings of the Inventory and Analysis, a Preservation Boundary has been delineated. In the Market Analysis, the property's market area has been defined and analyzed. Development Options for portions of the site outside the Preservation Boundary have been presented. The physical layout of development schemes are illustrated and are followed by the financial analysis of the various options. The following section evaluates these options, using criteria established by the Historic Charleston Foundation at the outset of this effort. The final section, Preferred Development Plan, illustrates and described the ideal development scheme for the McLeod site.

# 2.0 Historical Sketch

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# 2.0 Historical Sketch

## 2.1 Introduction

In order to establish the historic context of McLeod Plantation, historical research was carried out to identify individuals and events that have shaped the history of the property. The collections of the Charleston County Library, the Library of the Charleston Museum, the Charleston Record of Mesne Conveyance Office (RMC), Emory University, the Georgia Department of Archives and History in Atlanta, the Historical Charleston Foundation, the National Archives Cartographic Division, the South Carolina Division of Archives and History in Columbia, and the South Carolina Historical Society were all consulted during this undertaking. A variety of materials were reviewed at these repositories, including census data, deeds, manuscript collections, maps, photographs, plats and secondary sources. Collectively, these materials, both primary and secondary, offer some sense of the activities and land uses which distinguish this historic James Island plantation.

## 2.2 Early Occupation of the Site

The earliest white occupation of the property remains an uncertainty, but maps dating from 1695 to the present indicate that the site has been continuously occupied since at least the late seventeenth century. The 1695 Thornton-Morden map shows five "occupations" or established properties (each indicated by the symbol of a house) along Wappoo Creek, four of which are named *(Figure 2.A)*. Michael O. Hartley (1984:46-47) has determined that the "Morris" site on this 1695 map is the location of McLeod Plantation. No further historical information has been gathered to date concerning "Morris," and it is not known whether this was a plantation name or a surname.

## 2.3 The Lightwood/Parker Era, c.1770-1851

A map dated 14 March 1771 *(Figure 2.B)* depicts the property of Edward Lightwood as "...a plantation on tract of land containing two hundred & fifty acres on James Island...," so it is certain that the property was under Lightwood ownership at this time. Edward Lightwood II was born on 22 March 1736 and was the son of a Captain Edward Lightwood, who died in 1769. The younger Lightwood was a Charleston merchant and participated in the slave trade from 1762 until 1774 as part-owner, with Thomas Everleigh, of the firm Lightwood and Everleigh. Edward Lightwood II owned land in Craven and Berkeley Counties as well as on James Island, and according to the 1790 Federal Census owned 53 slaves in St. Andrews Parish. Since all of James Island was included in Saint Andrews Parish, it is likely that these slaves were all at Lightwood Plantation.




*Figure 2.A:* Detail of 1695 Thornton-Morden Map (from Hartley 1984)




*Figure 2.B:* 1771 Map of Edward Lightwood Plantation (Courtesy, Mr. Creighton Frampton)

During the Lightwood period, the principal residence was situated at the meeting point of two roads, which came together at a right angle. The 1787 map "Plan of the Siege of Charleston" *(Figure 2.C)* indicates the location of the Lightwood main house and contains much valuable information. What appears to be a dependency, directly west of the main house, is also depicted on this map as is an oak allee approaching the main house from the south, a road intersecting the oak allee at the main house and extending on to the west, and a path (shown as a single line whereas the allee and other main road are shown as double-line roads) extending from the main house to Wappoo Creek. The oak allee approaching Lightwood Plantation from the south was a major thoroughfare linking the plantation with James Island Creek. Civil War vintage maps indicate this as being the "Road to Secessionville," a settlement known in the Lightwood era as Riversville. The other major road, approaching Lightwood from the west, originated at the Stono River on property owned by Samuel Peronneau; this is almost certainly the present-day slave street which extends from the McLeod house to Folly Road. Near the end of the unlined path leading to Wappoo Creek was a small store.

Edward Lightwood married Elizabeth Peronneau on 1 January 1770. Elizabeth was the daughter of the same Samuel Peronneau mentioned earlier, the owner of land on the Stono River approximately two miles west of Lightwood. Edward and Elizabeth Lightwood had five daughters: Mary, Emma, Clelia, Valeria and Sarah. In 1796 Sarah Lightwood married William McKenzie Parker II, whose family hailed from the Hayes Plantation on Goose Creek. Parker was a merchant and owned several sailing vessels, and it is believed that he, like Edward Lightwood, was involved in the slave trade. Edward Lightwood died in 1797 and the plantation property passed to his wife Elizabeth. In all likelihood William Parker assumed direction of operations at Lightwood Plantation at this time.

James Island and Lightwood saw a variety of activity during the War of 1812. A battery was constructed at the southwest end of the island (Battery Island), a brief engagement was fought on the Stono River, and "instruction camps" were held at Stent's Point (now Secessionville) and Lightwood Plantation.

In 1829 Lightwood Plantation was purchased by William McKenzie Parker II from the estate of Elizabeth Lightwood at a public sale, though the date of Elizabeth Lightwood's death is not known. Parker purchased 769.5 acres at the "mouth of the Wappoo Creek on Ashley River" for $16,545. At Parker's death in 1834 the property passed to his wife Sarah and their two sons, William McKenzie Parker III and Edward Parker. It was these two Parker brothers who in 1851 sold the former Lightwood Plantation property along with some adjacent lands they had accumulated (a total of 1,693.5 acres) to Edisto Island landowner William Wallace McLeod.

## 2.4 The McLeod Era, 1851-1990

The McLeod family's Charleston roots can be traced back to the Rev. John McLeod, who was born in 1706 and died in the early 1740s, leaving a wife,

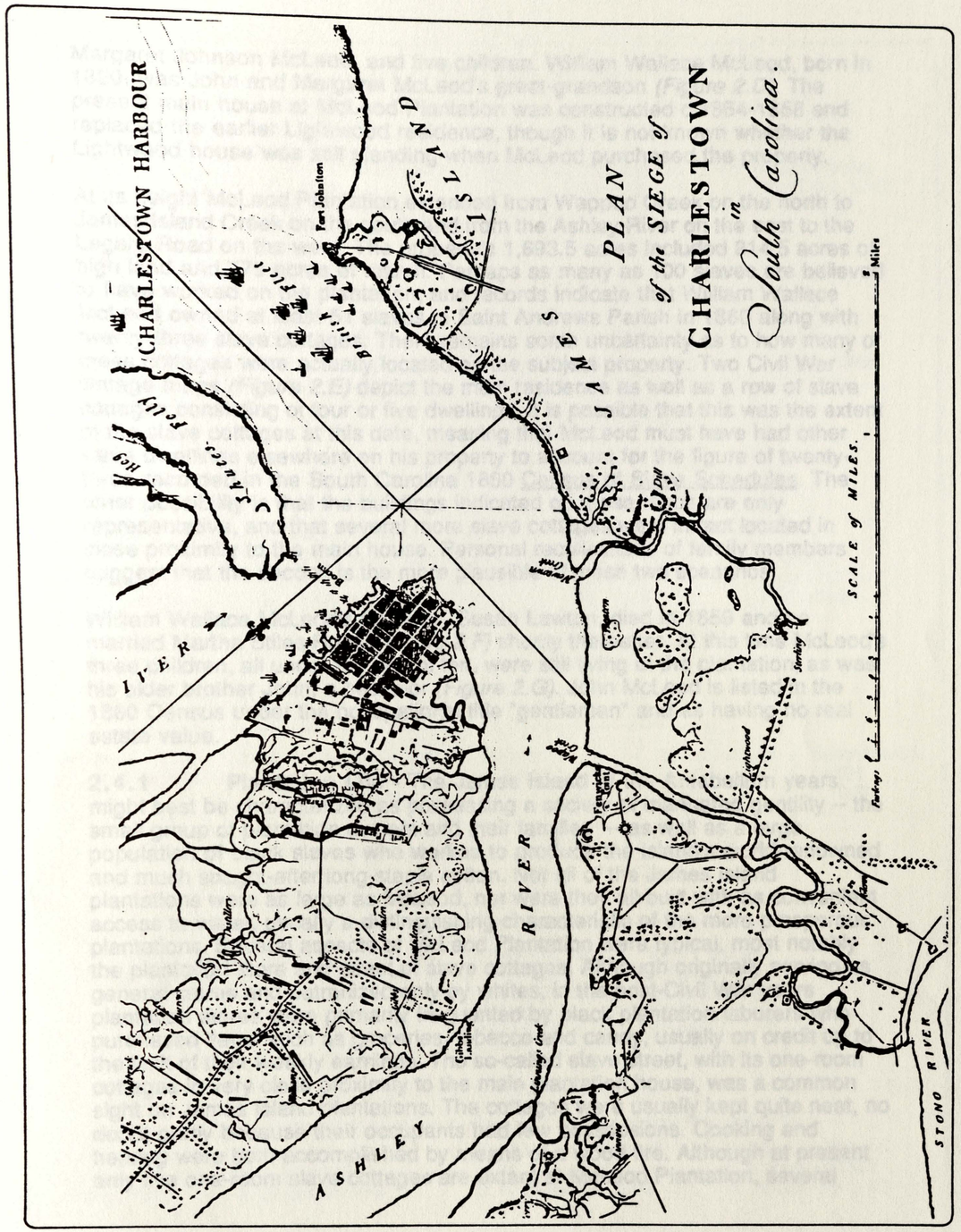
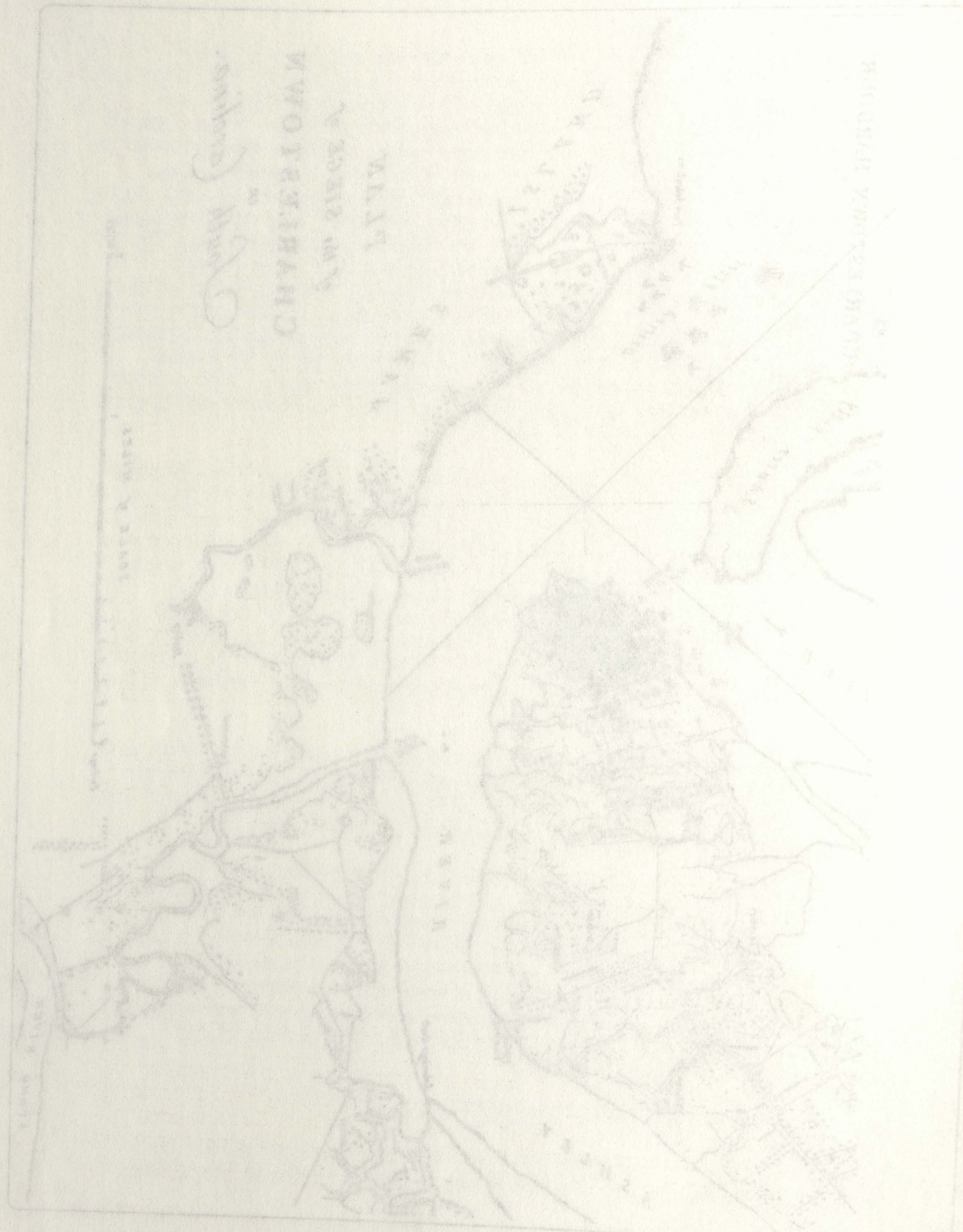



*Figure 2.C:* 1787 Plan of the Siege of Charleston (Courtesy, S.C. Historical Society)



Margaret Johnson McLeod, and five children. William Wallace McLeod, born in 1820, was John and Margaret McLeod's great-grandson *(Figure 2.D)*. The present main house at McLeod Plantation was constructed c.1854-1858 and replaced the earlier Lightwood residence, though it is not known whether the Lightwood house was still standing when McLeod purchased the property.

At its height McLeod Plantation extended from Wappoo Creek on the north to James Island Creek on the south and from the Ashley River on the east to the Legare Road on the west. The property's 1,693.5 acres included 914.5 acres of high land and 779 acres of marsh. Perhaps as many as 100 slaves are believed to have worked on the plantation, and records indicate that William Wallace McLeod owned at least 51 slaves in Saint Andrews Parish in 1860 along with twenty-three slave cottages. There remains some uncertainty as to how many of these cottages were actually located on the subject property. Two Civil War vintage maps *(Figure 2.E)* depict the main residence as well as a row of slave cottages consisting of four or five dwellings. It is possible that this was the extent of the slave cottages at this date, meaning that McLeod must have had other slave dwellings elsewhere on his property to account for the figure of twenty-three recorded in the South Carolina 1860 Census of Slave Schedules. The other possibility is that the buildings indicated on these maps are only representative, and that several more slave cottages were in fact located in close proximity to the main house. Personal recollections of family members suggest that the second is the more plausible of these two scenarios.

William Wallace McLeod's first wife, Susan Lawton, died in 1859 and he married Martha Stiles Royal *(Figure 2.F)* shortly thereafter. At this time McLeod's three children, all under the age of ten, were still living at the plantation, as was his older brother John, a bachelor *(Figure 2.G)*. John McLeod is listed in the 1860 Census under the occupational title "gentleman" and as having no real estate value.

**2.4.1 Plantation Life -** The James Island of the Antebellum years might best be characterized as possessing a society of mannered gentility -- the small group of plantation owners and their families -- as well as a large population of black slaves who worked to produce the island's world-renowned and much sought-after long-staple cotton. Not all of the James Island plantations were as large as McLeod, nor were they all built with as convenient access to water, usually a distinguishing characteristic of the more prosperous plantations. Several aspects of McLeod Plantation were typical, most notably the plantation store and street of slave cottages. Although originally serving as general stores and patronized only by whites, in the post-Civil War years plantation stores were primarily frequented by black plantation laborers who purchased items such as groceries, tobacco and candy, usually on credit up to the limit of their weekly earnings. The so-called slave street, with its one-room cottages in very close proximity to the main plantation house, was a common sight on James Island plantations. The cottages were usually kept quite neat, no doubt partly because their occupants had few possessions. Cooking and heating were both accomplished by means of a wood fire. Although at present only five one-room slave cottages are extant at McLeod Plantation, several

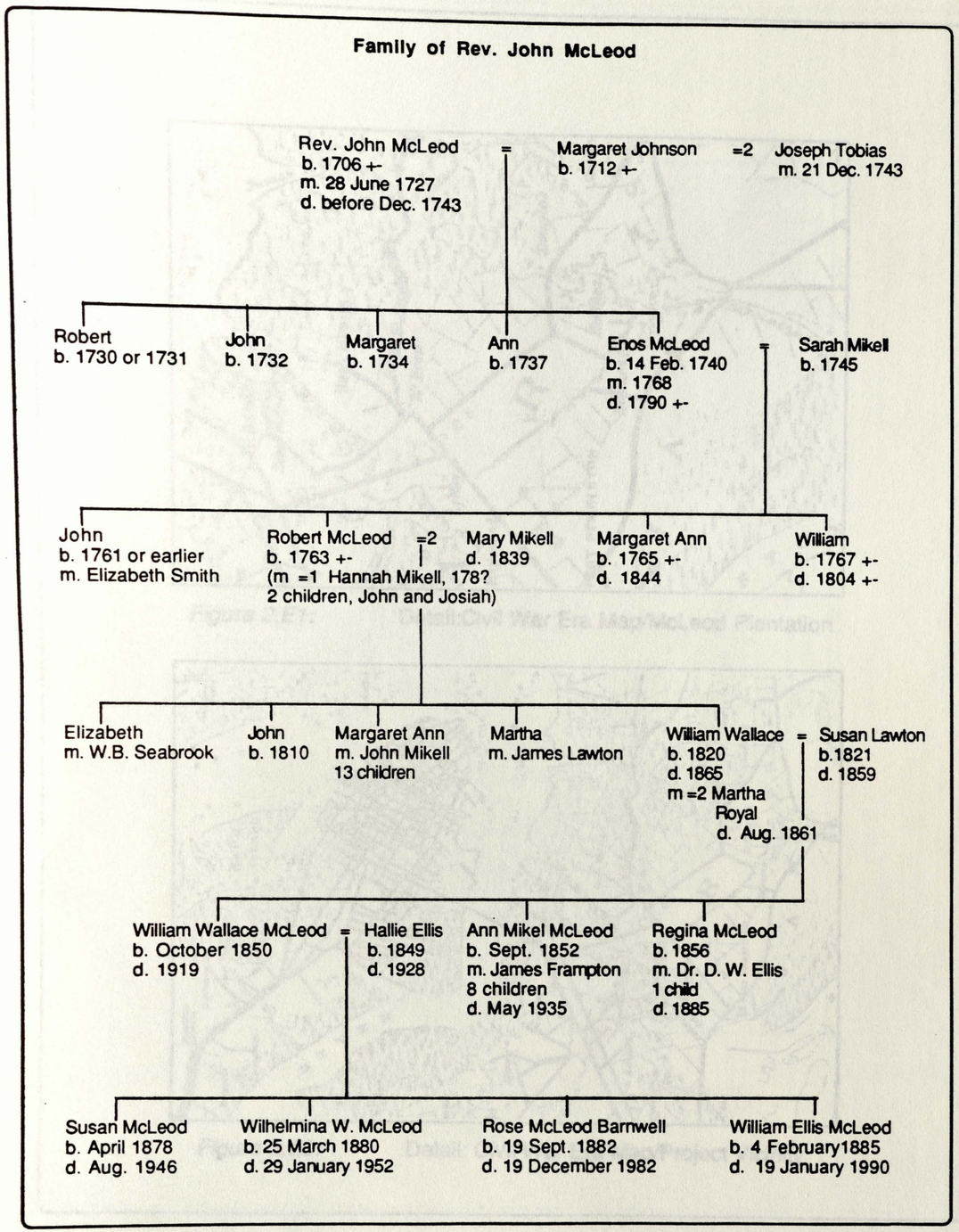



*Figure 2.D:* Family of Reverend John McLeod

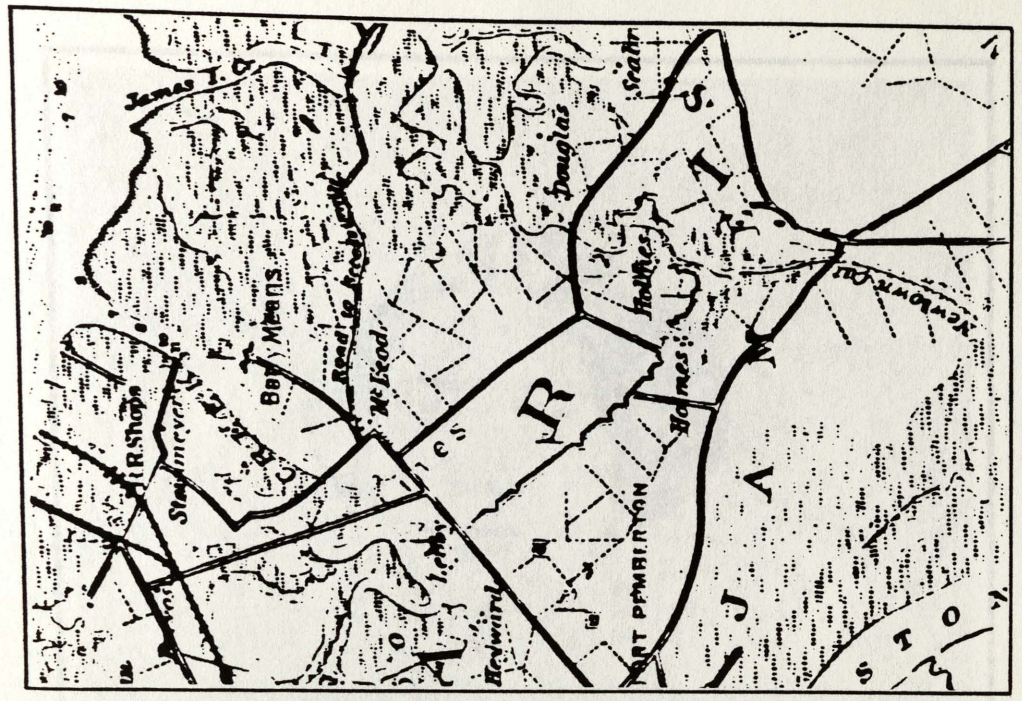



*Figure 2.E1:* Detail:Civil War Era Map/McLeod Plantation

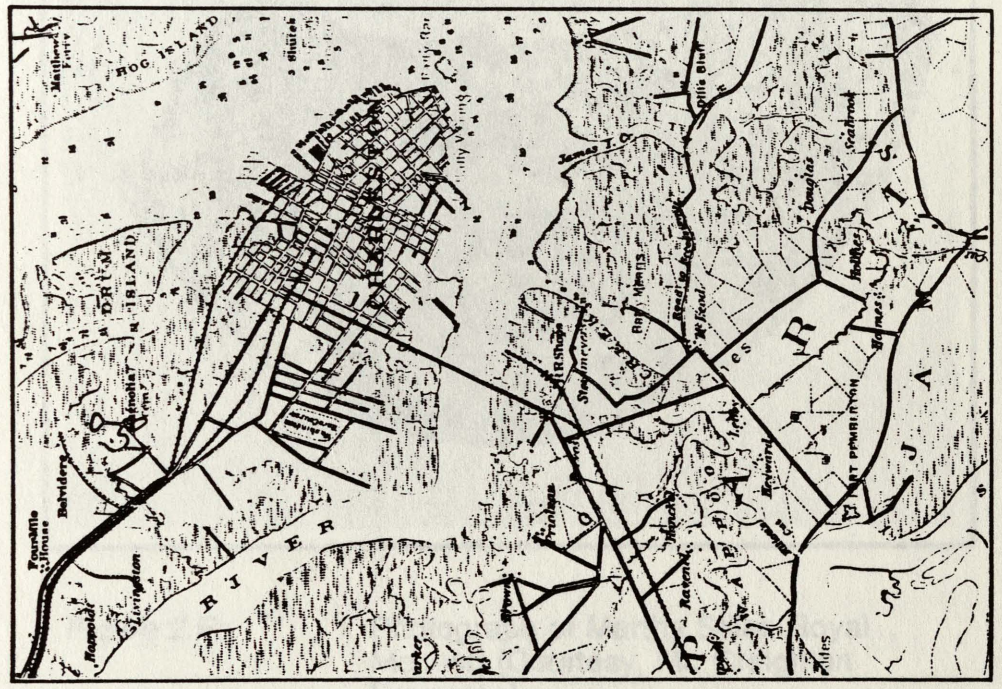



*Figure 2.E2:* Detail: Civil War Era Map/Project Vicinity



*Figure 2.F:* Photograph of Martha Stiles Royal McLeod (Courtesy, Mr. Creighton Frampton)

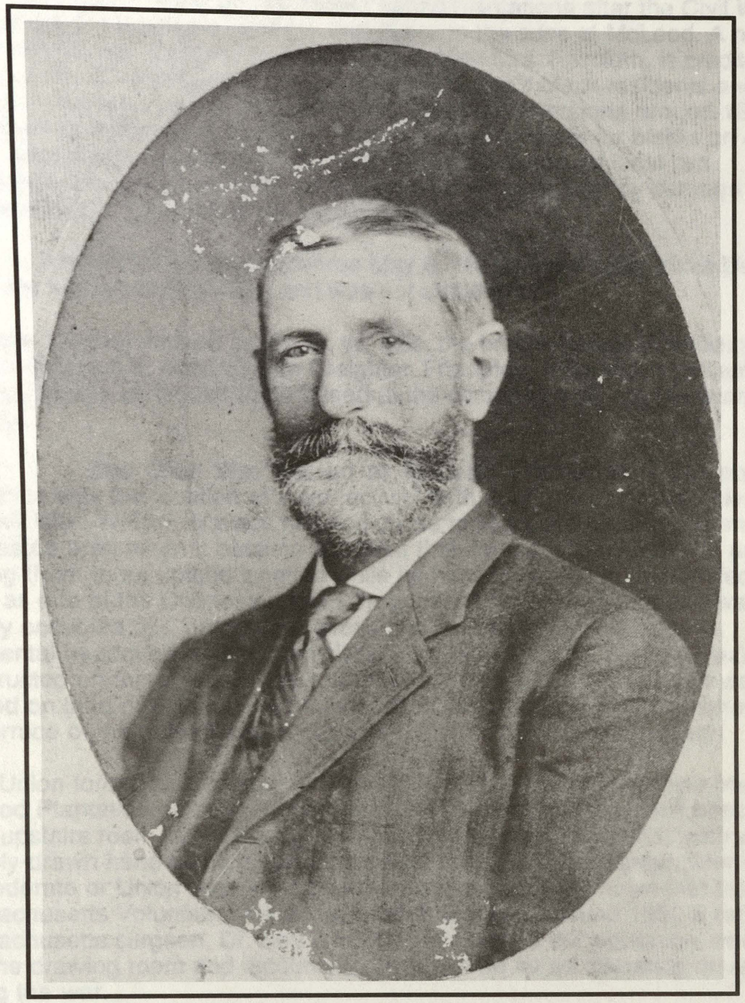


*Figure 2.G:* Photo of John McLeod (Courtesy, Mr. Creighton Frampton)

sources contend that a second row of dwellings formerly lined the opposite side of the street and that two additional cottages originally stood between the kitchen and what is now the first cottage. It is not known when these buildings were removed.

Blacks continued to work on the James Island plantations after the Civil War and well into the twentieth century, and this was the case at McLeod. A northern female missionary, believed to have been named Mrs. Faircloth, is credited with giving her life to helping educate some of the island's black residents and working to improve their living conditions. She died of malaria around 1870. The cemetery at McLeod Plantation was a family cemetery for blacks on James Island, apparently not just for those employed at McLeod. At least two headstones are known to exist but they have been obscured by damage from Hurricane Hugo. One of the two headstones reads:

> In memory of Benjamin Monroe May 8, 18-- in the 2- year of his life
> He was an honest man and was not afraid to die

Benjamin Monroe worked for Dr. D. W. Ellis, the brother-in-law of William Wallace McLeod II. According to Creighton Frampton, a cousin of William Ellis McLeod, blacks continued to be buried at the cemetery well into the twentieth century.

**2.4.2 The Civil War Period at McLeod Plantation -** McLeod Plantation was the location of major activity both during and immediately after the Civil War. William Wallace McLeod chose to evacuate his family from the Charleston area when it became apparent that James Island would be unsafe, moving them to an upland location while he himself served in the Confederate Army as one of the Charleston Light Dragoons. The McLeod property was initially occupied by Confederate forces and utilized as a field hospital, regimental headquarters and commissary for James Island. Battery Means was constructed on the plantation as a defense for Charleston Harbor and was located on land now within the boundaries of the Country Club of Charleston; the terrace of the present-day clubhouse runs along the former battery.

After Union forces took control of James Island, they utilized the main house at McLeod Plantation as their own hospital and officers' quarters. Still observable in an upstairs room today is a sign reading "Adjutant's Office, 2nd," with a crudely-drawn hand pointing toward a nearby door. It is not certain whether Confederate or Union occupants created the sign, but it is known that the 55th Massachusetts Volunteers were stationed at McLeod; around 1930 a retired Massachusetts surgeon, Dr. Bert J. Wilder, returned to the plantation, asked to see the drawing room and recounted how it served as an operating theater during the war.

Shortly after the Civil War ended, McLeod Plantation was established as an office of the Freedmen's Bureau. Newly-freed blacks from James Island and the surrounding vicinity camped in tents and pine bough shelters in an open field

south of the main house near the center of food distribution and other services temporarily made available to them.

**2.4.3 McLeod Plantation During Reconstruction -** William Wallace McLeod died in 1865 and the property was divided among his three surviving children, never again to function as the extensive plantation it once was. Ann and Regina McLeod acquired portions of the plantation to the south of the present-day southern boundary of the subject property while William Wallace McLeod II received all of the plantation property fronting on Wappoo Creek, north of the lands divided by his sisters; this section included the plantation house, slave cottages and dependencies. An 1878 plat of W. W. McLeod's land does not indicate the presence of slave cottages but depicts a store near the landing as well as the main house and one other unidentified building and an unimproved street behind it *(Figure 2.H)*. A survey map from 1879 identifies a "settlement" at the location of the main plantation house as well as both roads coming in to the property and the path leading to the landing *(Figure 2.I)*.

Under the direction of William Wallace McLeod II the plantation eventually resumed production of long-staple Sea Island cotton, the variety still considered the finest in the world. Toward the end of the nineteenth century, however, advances in the quality of short-staple cotton began providing competition for the more expensive long-staple variety. The South Carolina Agricultural Society, founded in 1872 to promote improved organization of the island's planters, was somewhat helpful in working to delay the effects of this new competition. McLeod Plantation was frequently a meeting place for the organization. The Agricultural Society gradually changed its focus after the turn of the century and today provides funds for agricultural scholarships.

**2.4.4 The Twentieth Century -** Early twentieth century depictions of McLeod Plantation include both a plat and an early topographic map. The plat dates to 1910 and shows the main house and two outbuildings to the northeast *(Figure 2.J)*. Also included on this plat is the oak allee as well as the cemetery. A 1918 topographic sheet shows a different number of outbuildings but does also depict the row of slave cottages *(Figure 2.K)*.

In 1910 a preliminary examination of James Island was carried out by J. V. Phillips, a drainage engineer with the United States Department of Agriculture, after receiving a request for such an examination from several James Island planters interested in the possibility of improving the island's drainage. A more thorough survey was completed in January of 1911, whereupon a series of drainage improvements were recommended. The report noted that James Island was "divided into 17 large plantations, omitting the several small tracts under colored ownership." Most of the black land owners had purchased tracts of only five to twenty acres. Long-staple cotton still constituted the main crop, but truck farming, primarily the raising of asparagus, cabbage and Irish potatoes, was increasing on the island; cotton prices had been depressed in recent years, with the 1910 crop bringing only fifty cents per pound even though James Island cotton was still considered among the world's finest. These agricultural

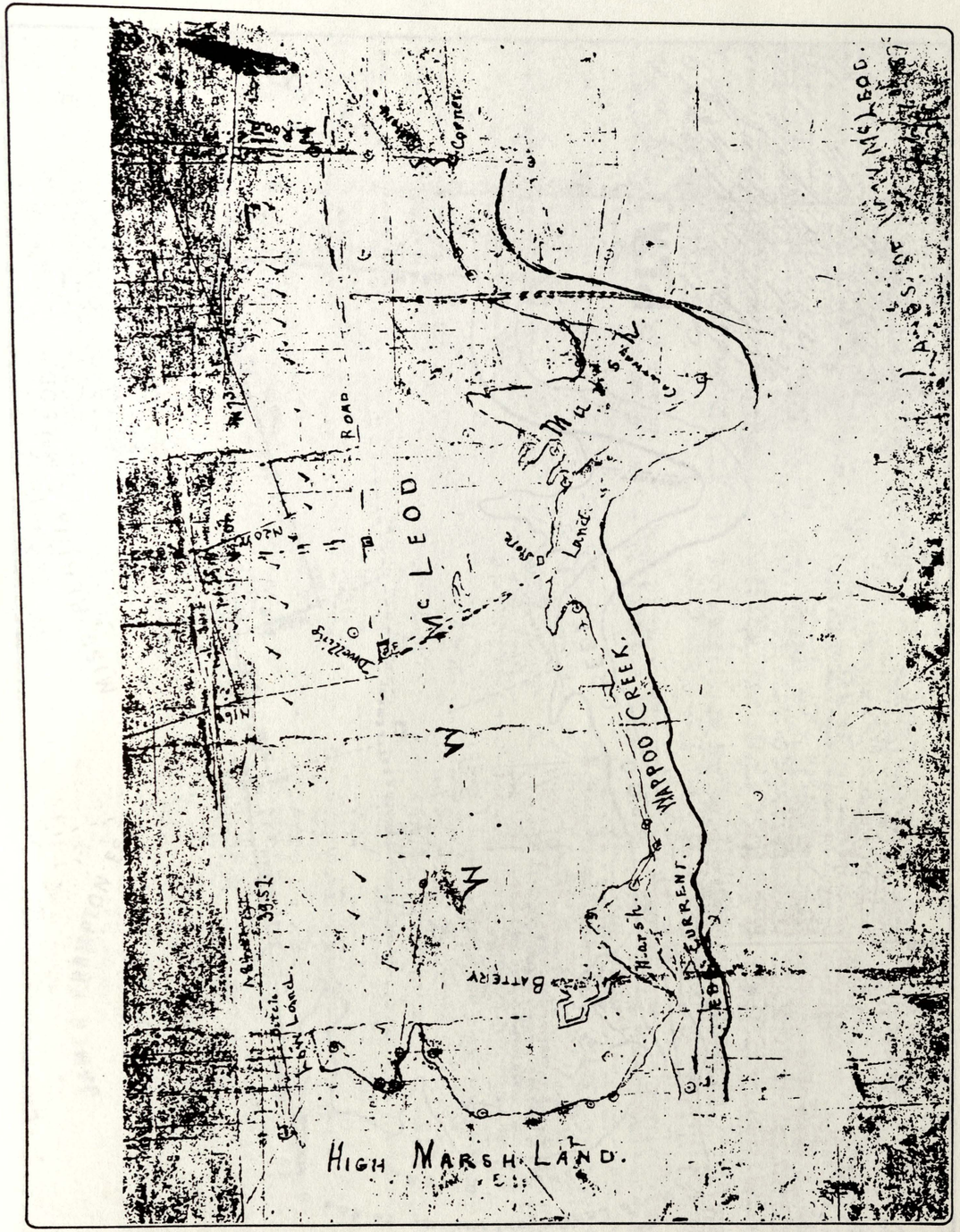



*Figure 2.H:* McCrady Plat #956, 1878 (RMC)

*Figure 2.1:* **Guerard (?) Survey, 1879 (Courtesy, Mr. Creighton Frampton)**

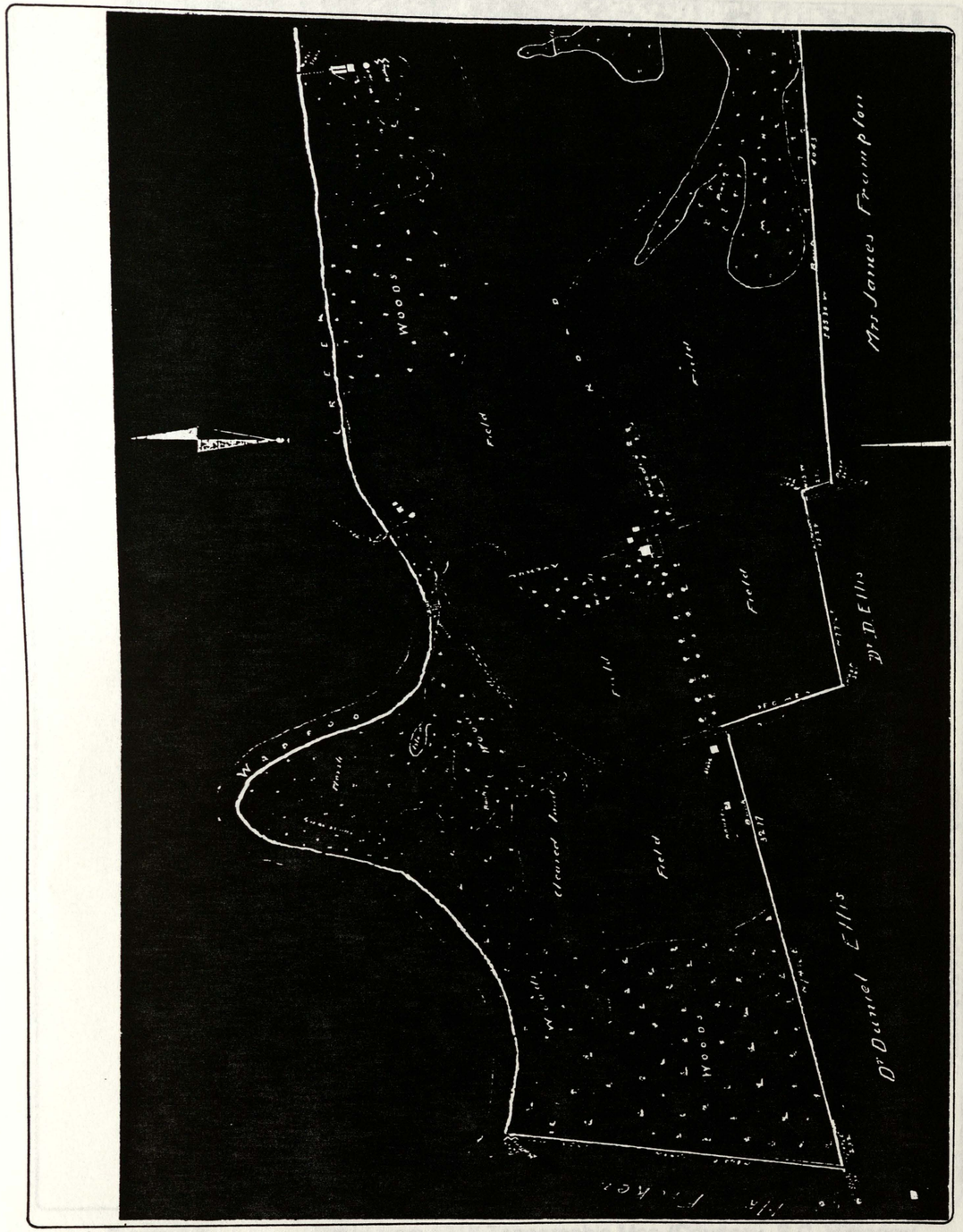



*Figure 2.J:* **McCrady Plat #780, 1910 (RMC)**

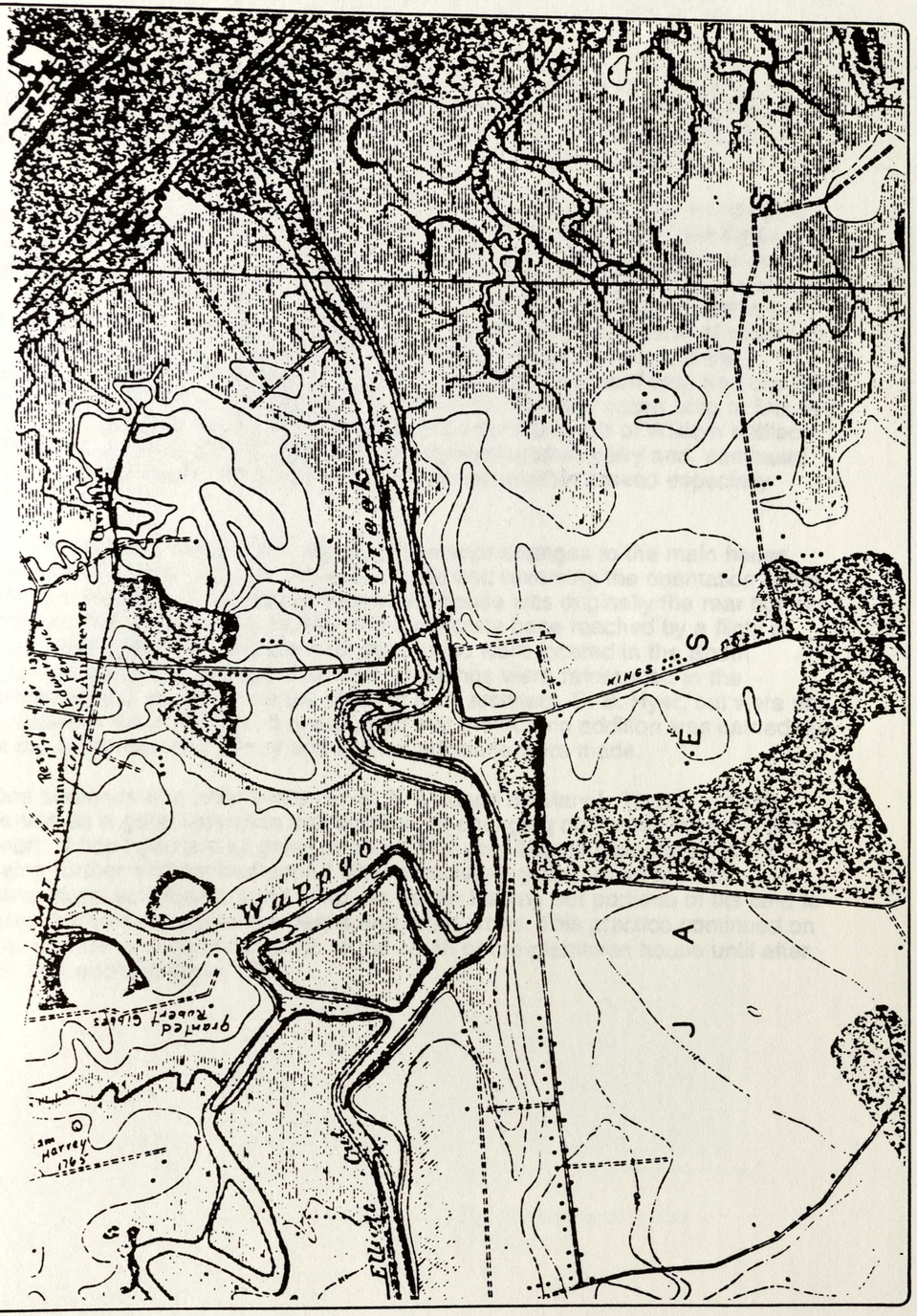



*Figure 2.K:* Detail from 1918 Topographic Map (Courtesy, S.C. Historical Society)

developments no doubt prompted the James Island plantation owners to do what they could to improve production potential on their properties, hence the move to install tile drainage systems. Such work was carried out at McLeod Plantation in 1911 and the property did become more productive.

In 1911 William Ellis McLeod (b.1885) *(Figure 2.L)* returned to assist his father after spending three years working for and receiving instruction from Captain Elias L. Rivers, one of the most highly-regarded sea island cotton planters. Unfortunately, the young McLeod would never have the opportunity to oversee a successful cotton crop, for in the late 1910s the boll weevil appeared in the Charleston vicinity and by 1920 had virtually ended the production of cotton on James Island. By this time several other crops were being raised at the plantation, with the 1914 Irish potato crop apparently a record crop and one that had made a considerable profit for the McLeods. The last cotton crop at McLeod Plantation was planted in 1922, three years after the death of William Wallace McLeod II. William Ellis McLeod briefly operated a small dairy and continued growing cucumbers and potatoes for a time, but neither proved especially profitable.

In 1925 McLeod made some significant exterior changes to the main house, adding a one-story room to the east facade and reversing the orientation of the principal facades. The present front of the house was originally the rear but has received the addition of a portico with a concrete base reached by a flight of stairs. Specifications (undated) for the portico were located in the South Carolina Historical Society collection. Drawings were referenced in the specifications, produced by the office of local architect, D. B. Hyer, but were not included in the collection. It is assumed that the portico addition was carried out at the same time the pantry and kitchen additions were made.

One sentence of a letter written to W. E. McLeod by Mary L. Hayter in 1930 serves as a good indication that times were changing on James Island in that year: "I hope you are all going strong & that your beautiful plantation is not being further encroached upon." After completely giving up on his own agricultural activities around 1940, he began leasing out portions of his land to other farmers who grew soybeans and other crops. This practice continued on the remaining agricultural lands to the south of the plantation house until after Mr. McLeod's death in 1990.

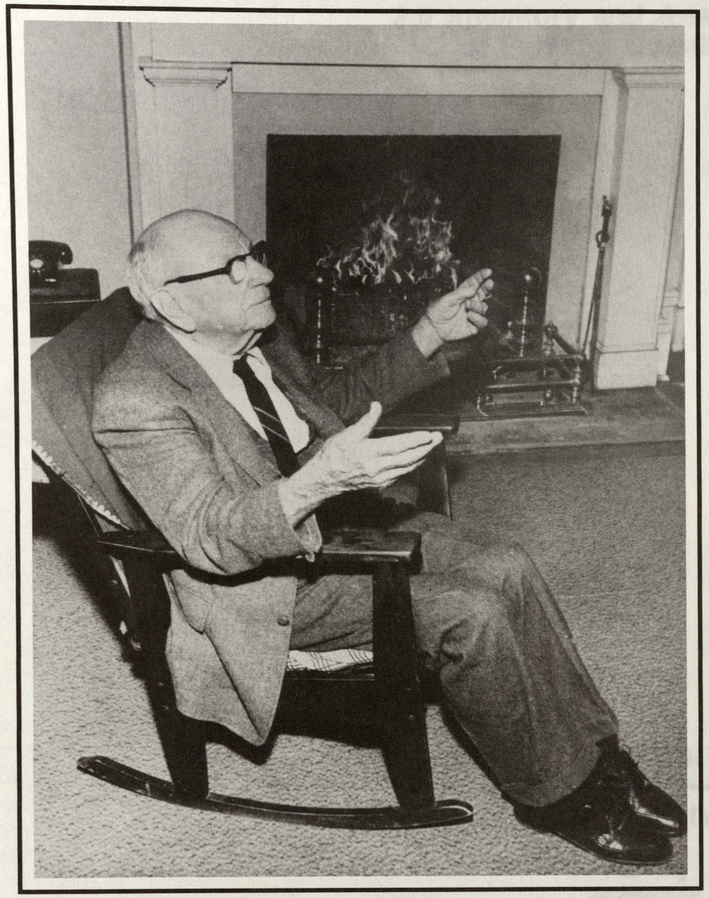


Figure 2:L: Mr. W. E. McLeod (Courtesy, Mr. Creighton Frampton)

# 3.0 Inventory and Analysis of Existing Conditions

**Jaeger**

**Pyburn**

Planning
Architecture
Historic Preservation
Landscape Architecture

# 3.0 Inventory and Analysis

## 3.1 Site Description

This 49.2 acre site is located within the city limits of Charleston and Charleston County, South Carolina.The site is bounded on the north by Wappoo Creek , which is part of the Intracoastal Waterway system; on the west by Folly Road; on the south by Tatum Street; and on the east by the golf course of the Charleston County Club. Country Club Drive bisects the site in a east-west direction in the northern portion of the site. Country Club Drive forms the boundary between city and county land. Approximately 6.8 acres, situated north of Country Club Drive, are in the unincorporated county. The balance of the site, 42.2 acres located south of Country Club Drive, is within the corporate limits of the City of Charleston.

The site contains a significant collection of historic structures situated near the center of the site. These include an antebellum plantation house and a variety of outbuildings. The ancillary structures include a row of frame slave dwellings.

The site is characterized by two interior roadways. These oak-lined roadways are known as "allees". The site includes an open agricultural field to the south of the plantation house. The balance of the site is primarily wooded.

## 3.2 Site Context

The site is surrounded by a variety of land uses. These uses are illustrated on Map 1: Property Context/Circulation. Land uses include: (1) single family residential; (2) multi-family residential; (3) commercial; (4) planned development; and (5) recreational. There is one institutional use within the site, a City of Charleston Fire Station. The fire station, situated on leased land, is located northeast of the Folly Road and Country Club Drive intersection.

Single family residential is situated to the south, southeast, and east of the site. To the south, single family structures line the south side of Tatum Street and are oriented toward the McLeod site. Single family residences to the southeast are located in Country Club II, a residential subdivision. There is a small maintenance yard, associated with the golf course, between Country Club II and the McLeod site. Single family residences are also located to the east of the site on the north side of Country Club Drive. These structures, which were part of the country club development, are separated from the site by a small multi-family development. The multi-family land use is comprised of two structures with approximately four units in each building. The multi-family structures have a dock on Wappoo Creek.

Commercial development, located to the west of the site between Maybank Highway and Cross Creek Drive, includes a neighborhood shopping center. Uses at the center include a grocery store, drug store, and other retail uses. There is a bank on an outparcel of the shopping center site.

The planned unit development, also located west of the site, contains residential, office, and commercial uses. Situated between Maybank Highway and Wappoo Creek, the development includes low rise and high rise residential structures, low rise and multi-story office buildings, and a restaurant.

Recreational uses include the Charleston Country Club Golf Course, which comprises the majority of the eastern boundary of the site, and the intracoastal waterway, Wappoo Creek, to the north.

**3.2.1 Site Utilities -** The site has municipal water and sewer service. Sewer service consists of eight inch lines with manholes on Folly Road and Country Club Drive. Water service appears to be most easily provided by a 10 inch line on Country Club Drive.

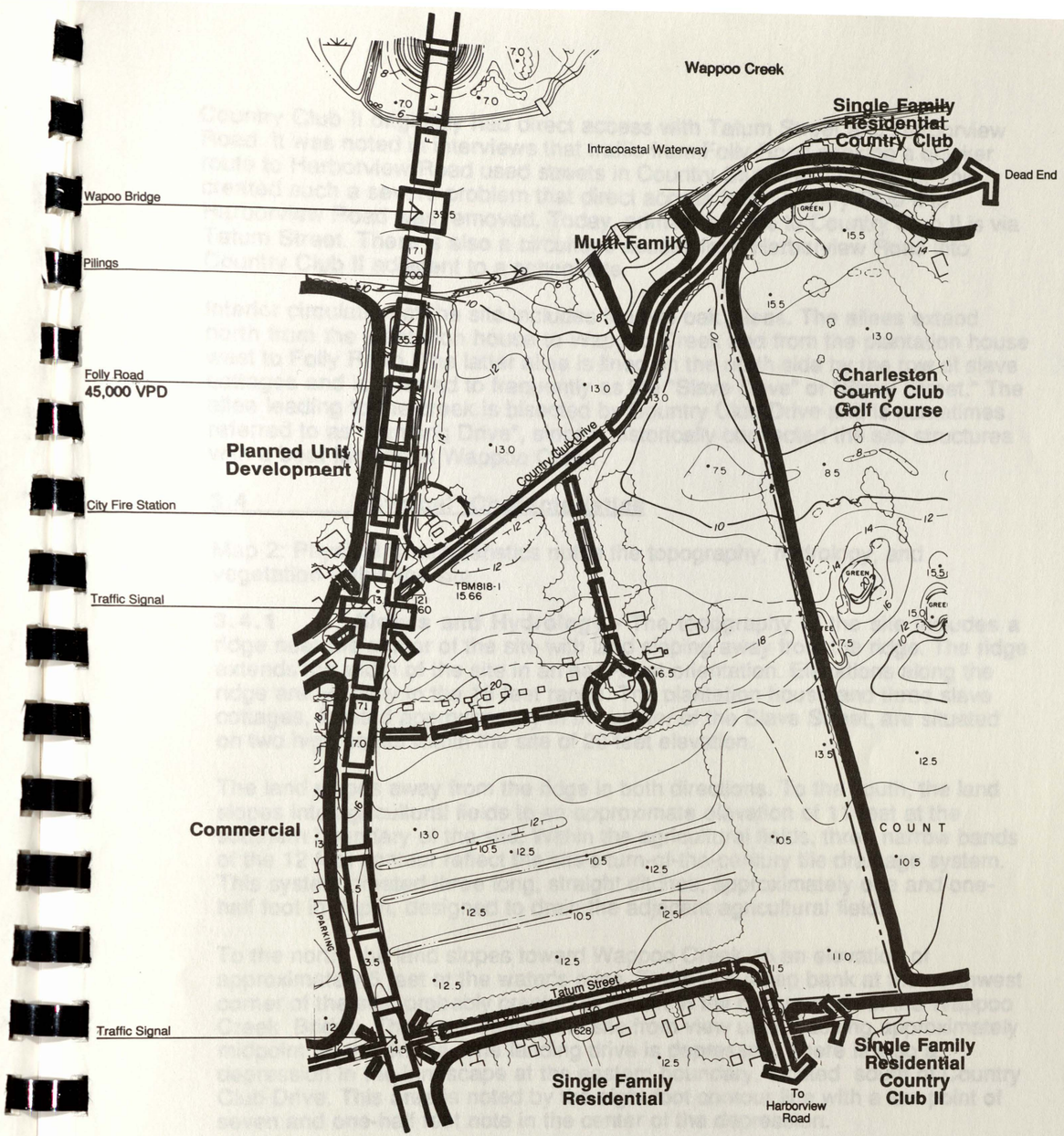
## 3.3 Circulation

The circulation system surrounding the site and within the site is illustrated on Map 1: Property Context/Circulation.

**3.3.1 Folly Road -** The major circulation access to the site is Folly Road. This arterial roadway has a current traffic count of approximately 60,000 vehicles per day (vpd). Folly Road contains two traffic lights adjacent to the site at the Maybank Highway/Country Club Drive and Tatum Street/Cross Creek Drive intersections.

Access from the City of Charleston is on Folly Road via the Wappoo Creek Bridge. The completion of the Mark Clark Expressway/James Island Connector, estimated in May 1991, will provide a second access to James Island from the Charleston Peninsula. The Mark Clark Expressway is a new circumferential freeway designed to link West of the Ashley, North Charleston, the Charleston Peninsula, Mount Pleasant, James Island and Johns Island. As portions of this expressway system are completed, traffic counts on Folly Road at Wappoo Creek Bridge are expected to decrease. With the completion of the entire freeway system, traffic counts at Wappoo Creek are anticipated to return to the present the 45,000 vpd level. The Wappoo Creek Bridge will remain the direct link between West of the Ashley and James Island.

**3.3.2 Other Circulation Routes -** Country Club Drive bisects the site and terminates in the county club development. Country Club Drive provides access to the multi-family development to the east of the site and the residential units and recreational amenities of the Charleston Country Club. Tatum Street to the south of the site serves residential land uses in this area. This road connects with Harborview Road.




# Property Context/ Circulation

**MAP 1**

0 25 50 75 100 150 200 300
Scale in Feet

North

*McLeod Plantation*
*James Island, South Carolina*

*Historic Charleston Foundation*
*Charleston, South Carolina*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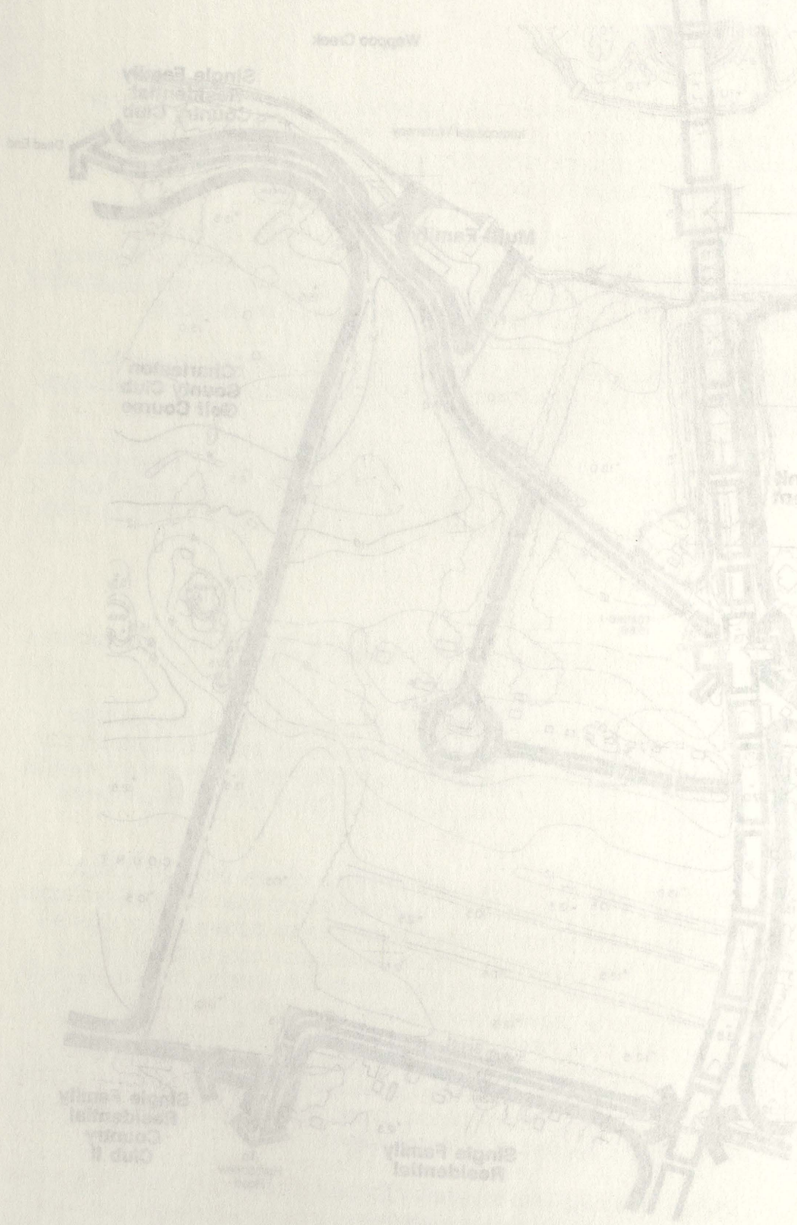


Country Club II originally had direct access with Tatum Street and Harborview Road. It was noted in interviews that traffic from Folly Road seeking a quicker route to Harborview Road used streets in Country Club II as short cuts. This created such a severe problem that direct access from Country Club II to Harborview Road was removed. Today, primary access to Country Club II is via Tatum Street. There is also a circuitous access from Harborview Road into Country Club II adjacent to a school site.

Interior circulation at the site includes the two oak allees. The allees extend north from the plantation house to Wappoo Creek and from the plantation house west to Folly Road. The latter allee is lined on the north side by the row of slave cottages and is referred to frequently as the "Slave Drive" or "Slave Street." The allee leading to the creek is bisected by Country Club Drive and is sometimes referred to as "Landing Drive", since it historically connected the site structures with a boat landing at Wappoo Creek .

## 3.4 Physical Characteristics

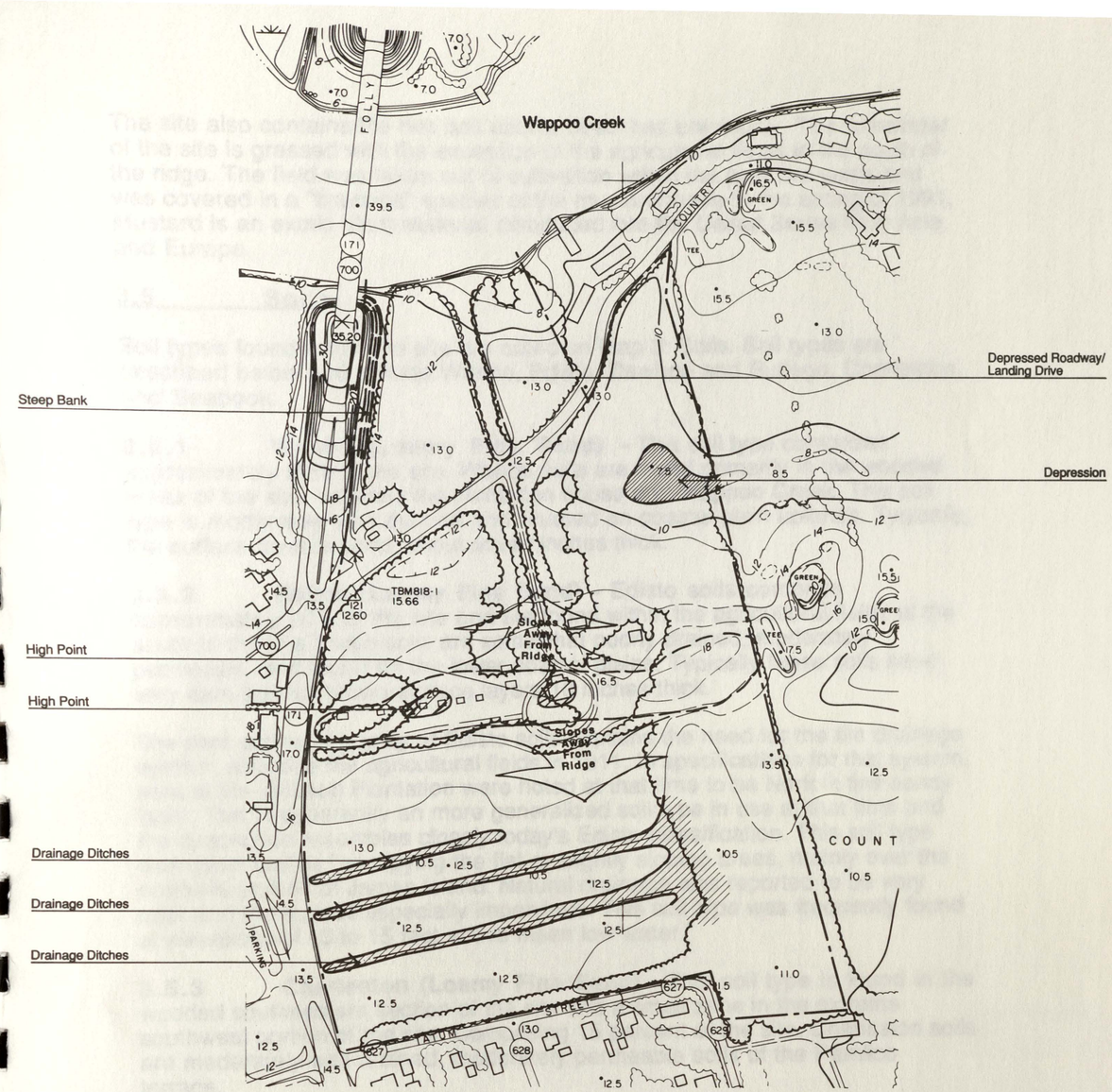
Map 2: Physical Characteristics notes the topography, hydrology, and vegetation within the site.

**3.4.1 Slopes and Hydrology -** The topography of the site includes a ridge near the center of the site with land sloping away from the ridge. The ridge extends the width of the site in an east-west orientation. Elevations along the ridge are typically in the 18 feet range. The plantation house and three slave cottages, located approximately in the center of the Slave Street, are situated on two high points within the site of 20 feet elevation.

The land slopes away from the ridge in both directions. To the south, the land slopes into agricultural fields to an approximate elevation of 11 feet at the southern boundary of the site. Within the agricultural fields, three narrow bands of the 12 foot contour reflect the site's turn-of-the-century tile drainage system. This system created three long, straight ditches, approximately one and one-half foot in depth, designed to drain the adjacent agricultural fields.

To the north, the land slopes toward Wappoo Creek to an elevation of approximately 6 feet at the water's edge. There is a steep bank at the northwest corner of the site, probably created by fill dirt in the construction of the Wappoo Creek Bridge. The bank buffers the site from view until reaching approximately midpoint on the bridge. The landing drive is depressed. There is also a depression in the landscape at the eastern boundary, located south of Country Club Drive. This area is noted by the eight foot contour line with a low point of seven and one-half feet note in the center of the depression.

**3.4.2 Vegetation** - Tree cover within the site is located along the boundaries of the property with the exception of the agricultural field.There is a continuous 300 foot wide wooded border along the eastern property line. The vegetation is primarily hardwoods. Hugo, a hurricane which hit the city on September 22, 1989, resulted in extensive damage to the trees.




# Physical Characteristics

## *McLeod Plantation*

*James Island, South Carolina*

**MAP 2**

0 25 50 75 100 150 200 300
Scale In Feet

North

*Historic Charleston Foundation*
*Charleston, South Carolina*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Real Estate Analysts

The site also contains the two oak allees, described previously. The remainder of the site is grassed with the exception of the agricultural fields to the south of the ridge. The field was taken out of cultivation within the past five years and was covered in a "brassica" species of the mustard family in the spring of 1991. Mustard is an exotic plant material introduced into the United States from Asia and Europe.

## 3.5 Soils

Soil types found within the site are noted on Map 3: Soils. Soil types are described below and include Wando, Edisto, Dawhoo and Rutlege, Charleston, and Seabook.

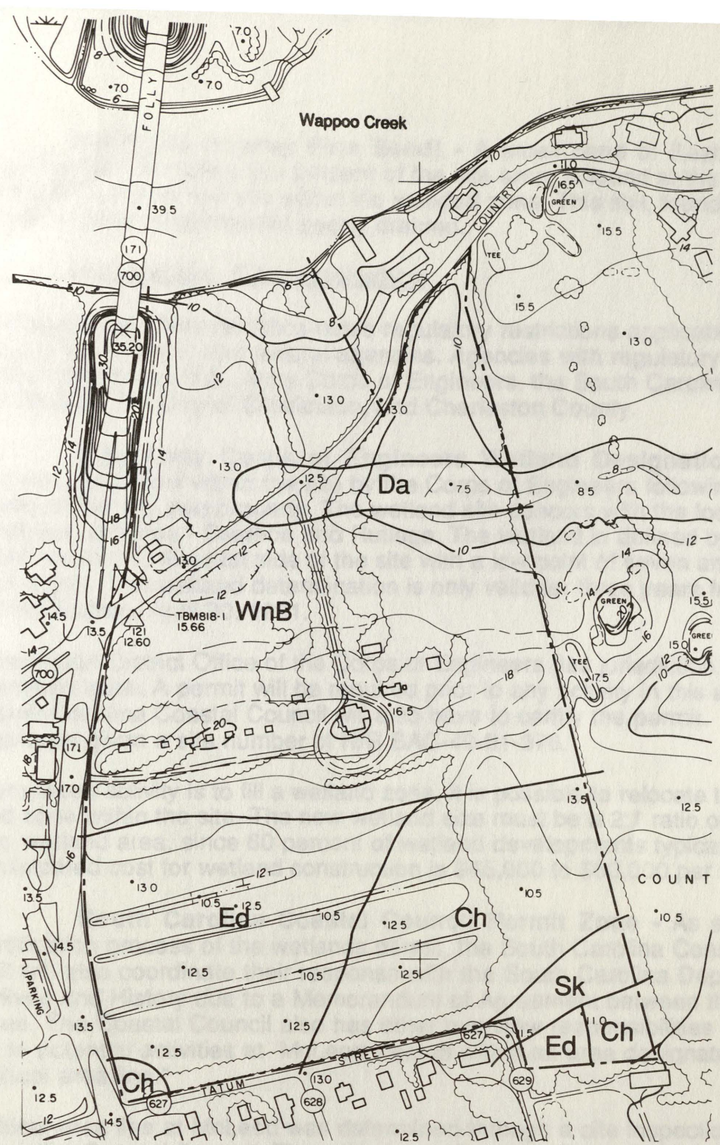
**3.5.1 Wando (Loamy Fine Sand)** - This soil type comprises approximately 50% of the site. Wando soils are found primarily in the wooded areas of the site, between the plantation house and Wappoo Creek. This soil type is moderately well drained and situated on coastal plain uplands. Typically, the surface layer is sand, about seven inches thick.

**3.5.2 Edisto (Loamy Fine Sand)** - Edisto soils comprise approximately 20% of the site and are found within the agricultural fields at the south of the site.These soils are somewhat poorly drained, moderately permeable, and found on the lower coastal plains. Typically these soils have very dark grayish brown surface layers 10 inches thick.

The poor drainage quality of Edisto soils explains the need for the tile drainage system, added to the agricultural fields in 1911. In specifications for that system, soils at the McLeod Plantation were noted at that time to be Norfolk fine sandy loam. This is apparently an more generalized soil type in use at that time and the description resembles closely today's Edisto classification. This soil type was described as "occupying the flat or slightly sloping areas, mainly over the northerly portion of James Island. Natural drainage was reported to be very poor and the subsoil especially impervious. This soil type was frequently found at elevations of 10 to 15 feet above mean low water."

**3.5.3 Charleston (Loamy Fine Sand)** - This soil type is found in the wooded southeastern section of the site and a small zone in the extreme southwest portion of the site. Comprising 15 percent of the site, Charleston soils are moderately well drained, moderately permeable soils of the Pamlico terrace.

**3.5.4 Dawhoo and Rutlege (Loamy Fine Sand)** -This soil type, which totals approximately ten percent of the site, is found in a small band at the eastern edge of the site. This band is approximately 100 feet wide and extends into the site approximately 600 feet from the adjacent golf course. This soil type is described as deep, very poorly drained and located on floodplains. This soil type formed in coastal plain sediments. Typically, Dawhoo and Rutlege soils have a black loamy sand surface layer, eight inches thick.




Legend

| | |
|---|---|
| Ch | Charleston |
| Da | Dawhoo |
| Ed | Edisto |
| Sk | Seabrook |
| WnB | Wando |

# Soils

## *McLeod Plantation*

*James Island, South Carolina*

**MAP 3**

0 25 50 75 100 150 200 300
Scale in Feet

North

*Historic Charleston Foundation*
*Charleston, South Carolina*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Archeology

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Real Estate Analysis

**3.5.5 Seabrook (Loamy Fine Sand) -** A small band of Seabrook soils, totalling approximately five percent of the site area, is found at the southeastern portion of the site within the wooded zone. This soil, found on the lower coastal plain, is somewhat poorly drained.

## 3.6 Regulatory Characteristics

Map 4: Regulatory Characteristics notes regulatory restrictions applicable to the site through local, state, and federal agencies. Agencies with regulatory controls on the site include the U.S. Army Corps of Engineers, the South Carolina Coastal Council, the City of Charleston, and Charleston County.

**3.6.1 U.S. Army Corps of Engineers Wetland Designation -** A wetland was identified within the site by the Corps of Engineers following a site inspection of the McLeod property. The wetland site concurs with the location of the floodplain soil type - Dawhoo and Rutlege. The wetland is defined by the eight foot contour at the east side of the site with a low point of seven and one-half feet noted. This wetland determination is only valid for three years from the date of notification, April 30, 1991.

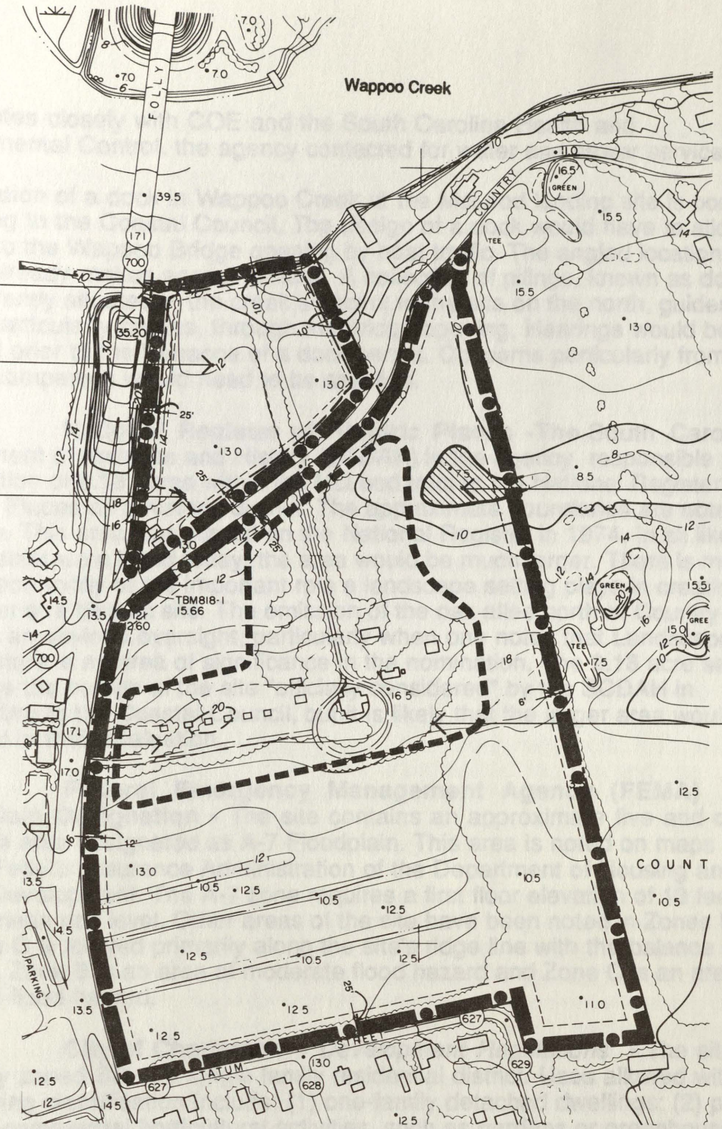
The Charleston District Office of the Corps of Engineers has jurisdiction over this identified zone. A permit will be required prior to any activity in this area. The South Carolina Coastal Council will also have to certify the permit. This site has been given a site number of N/R SAC-49-91-376.

If the proposed activity is to fill a wetland zone, it is possible to relocate the wetland zone within the site. The new wetland size must be a 2:1 ratio of the existing wetland area, since 60 percent of wetland developments typically fail. The anticipated cost for wetland construction is $45,000 to $60,000 per acre.

**3.6.2 South Carolina Coastal Council Permit Zone -** As a part of the certification process of the wetlands permit, the South Carolina Coastal Council will also coordinate their response with the South Carolina Department of Archives and History due to a Memorandum of Agreement between these two agencies. The Coastal Council also has other overview responsibilities with regard to potential activities at McLeod located within an area designated as the "critical area line."

The critical area line at McLeod was determined through a site inspection by staff from the Coastal Council. The critical area line was situated along Wappoo Creek, primarily at the top of the bank. The critical area line should be drawn on a topographic survey of the property, when such a survey is produced in later phases of planning. Any activity between the critical area and the water will require a permit from the Coastal Council.

The criteria used by the Coastal Council in issuing permits includes the following: (1) presence of wetlands; (2) storm water control (post development run-off cannot exceed pre-development runoff); (3) presence of archeological resources; and (4) relationship with a dock master plan. The Coastal Council




South Carolina Coastal Council
Critical Area Line

County of Charleston
Zoned RM4
Multi-Family
Residential

A7 Floodplain Zone

National Register of
Historic Places
Approximate District Boundary

C.O.E. Wetlands

City of Charleston
Zoned SR1
Single Family
Residential

Legend

- City
- County
- Floodplain Zone
- Coastal Council Permit Zone

# Regulatory Characteristics

## *McLeod Plantation*

*James Island, South Carolina*

**MAP 4**

0 25 50 75 100 150 200 300
Scale in Feet

North

*Historic Charleston Foundation*
*Charleston, South Carolina*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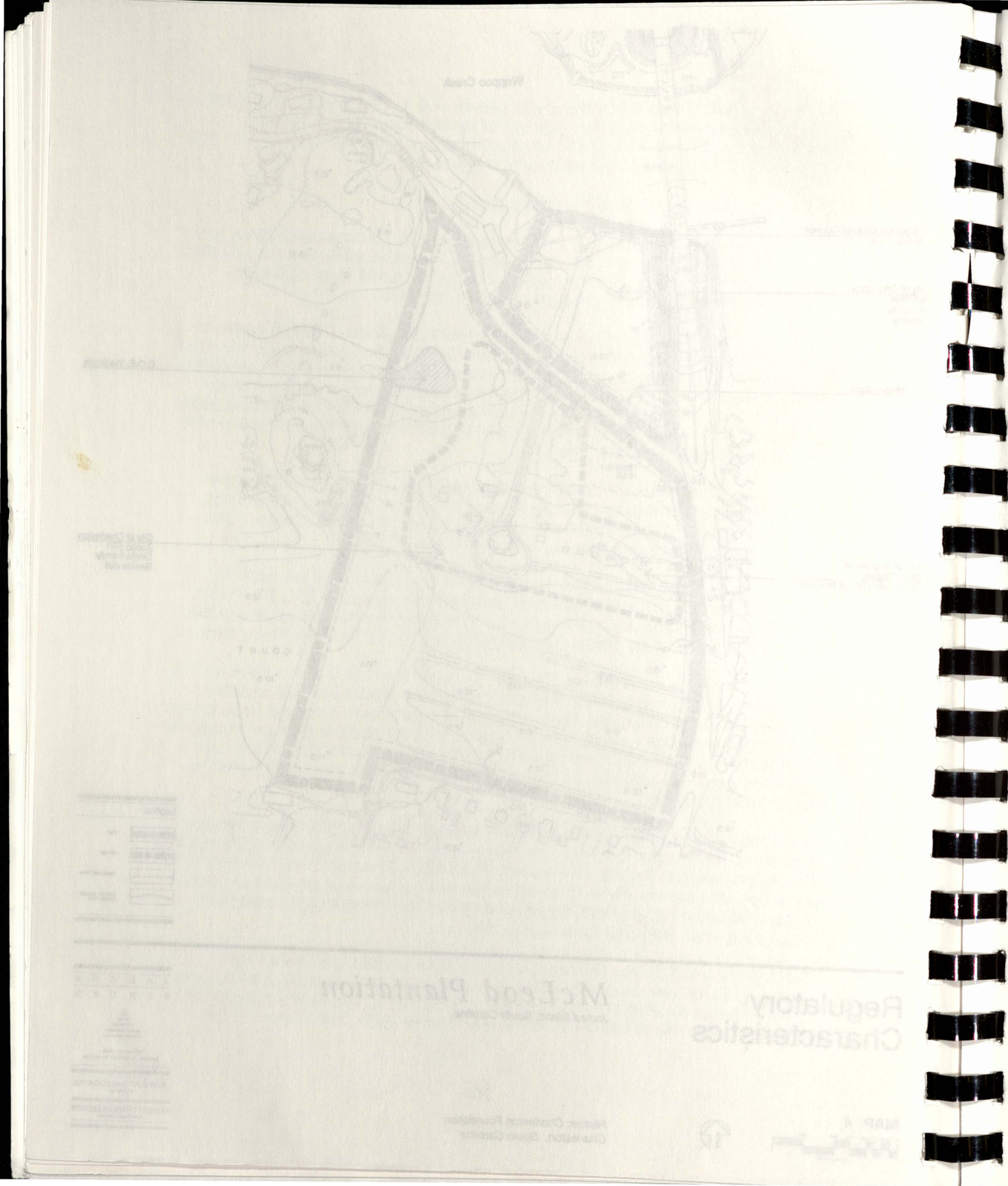


coordinates closely with COE and the South Carolina Health and Environmental Control, the agency contacted for water and sewer service.

The location of a dock in Wappoo Creek at the McLeod landing site is possible according to the Coastal Council. The design of a dock would have to allow access to the Wappoo Bridge opening by boat traffic. The angled location of the bridge already makes access difficult. A collection of pilings, known as dolphins and currently situated in the creek adjacent to the site on the north, guides boat traffic, particularly barges, through the bridge opening. Hearings would be required prior to the issuance of a dock permit. Concerns particularly from towing companies would need to be satisfied.

**3.6.3 National Register of Historic Places** -The South Carolina Department of Archives and History (SCDAH) is the agency responsible for the designation of 9.18 acres within the McLeod tract to the National Register of Historic Places as a historic district. The approximate boundaries are noted on the map. This area was placed on the National Register in 1974. In all likelihood if the district were listed today, the area would be much larger. There is more recognition today of the important role a landscape setting plays in creating the character of a historic site. The omission of the oak allee north of Country Club Drive is an obvious oversight, particularly when one notes that Landscape Architecture is an area of significance in the nomination. The 9.18 acre section would be the portion of the site "officially considered" by the SCDAH in responding to the Coastal Council, but it is likely that the larger area would be included in their evaluation.

**3.6.4 Federal Emergency Management Agency (FEMA) Floodplain Designation** - The site contains an approximate five and one-half acre area designated as A-7 Floodplain. This area is noted on maps issued by the Federal Insurance Administration of the Department of Housing and Urban Development. The A-7 zone requires a first floor elevation of 13 feet above mean sea level. Other areas of the site have been noted in Zones B and C. Zone C is located primarily along the site's ridge line with the balance in Zone B. Zone B is an area of moderate flood hazard and Zone C is an area of minimal flood hazard.

**3.6.5 City of Charleston** - *Development Regulations* - The site is currently zoned SR-1, a single family residential district. Uses allowed within this zoning classification include: (1) one-family detached dwellings; (2) parks; (3) non-commercial horticultural activities, such as gardens or greenhouses; (4) electric transformer or gas regulator stations; (5) churches; (6) elementary or secondary schools; (7) community parking lots, provided that such lots are enclosed with five and one-half foot high screen; (8) cemeteries; and (9) accessory uses, incidental to the used described above. Setbacks within the SR-1 zone are noted on the map and include: (1) front and rear setback of 25 feet each to equal a total of 60 feet; (2) side yards to the west and south 12 feet; and (3) side yards to the east and north six feet. Minimum lot size is 9,000 square feet. A maximum of 35% of the lot can be occupied by the building and the maximum height is 35 feet/two and one-half structures.

*Tree Protection Ordinance* - In addition to zoning, the City of Charleston has a tree protection ordinance. This ordinance requires that a certain volume of tree cover be retained or added, if removed, in development. Trees specified for preservation are noted in several categories, such as, grand trees with 24 inches or greater trunk calipers and protected trees of eight inches or greater trunk calipers. A general rule of thumb is the retention of 20 trees per acre. The tree ordinance also specifies buffers along property lines and roadways.The tree ordinance will have implications if portions of the McLeod site are determined appropriate for development.

*Charleston 2000* - The City of Charleston is currently completing a land use plan to guide the development of the city into the next century. The current land use proposal for the McLeod site proposes an institutional use of the fire station site and a park and recreational use on the remainder of the site. According to Carol Lee Williams, Assistant Planning Director of the City of Charleston, the park and recreational use classification is used for sites such as Middleton Place. The use of the site as a historic interpretation center was the intent of the designation. The Charleston 2000 plan is anticipated to be approved in early summer. Communication between the Historic Charleston Foundation and the City will be important to insure that the recommendations of this study are reflected in the Charleston 2000 plan.

*City of Charleston Fire Station* - The City of Charleston is currently exploring the permanent location of a fire station at the McLeod site. The current fire station was considered a temporary location when it was originally built. It appears that the City would like to make the fire station a permanent feature and has suggested that an one acre site would be required. The City has also noted that the current location at the stop light with easy access to Wappoo Creek Bridge is preferred to other locations along Folly Road within the site.

**3.6.6 Charleston County-** *Development Regulations* - The 6.8 acre tract located in Charleston County is zoned RM4, a multi-family designation. Uses permitted within this zone include: (1) residential - detached single-family dwellings, two and three-family dwellings, multi-family dwellings, rooming and boarding houses, and group homes; (2) transportation, communication, utilities, railroad right-of-way, right-of-way for pipeline and pressure control stations; (3) services - day care centers, cemeteries, nursing homes, primary and secondary schools, universities and colleges, churches, tourist homes, and bed and breakfast; and (4) cultural, entertainment, and recreation - historic monuments/sites, libraries, marinas, parks, and playgrounds. Setbacks include 25 feet for front and 10 feet for all other sides.

*Tree Protection Ordinance* - Charleston County also has an ordinance to protect the existing vegetation of a site. The county ordinance has similar guidelines to the city ordinance, described above.

*National Register Protection Zone* - Charleston County is currently considering an ordinance to protect National Register properties. Initially, a "sphere of influence" approach was considered. This would have provided development

control regulations within 1000 feet of a National Register site. According to Steve Dykes, Planning Director of Charleston County, this approach was determined to be somewhat arbitrary due to the diversity of sites and the uniqueness of each site. A more customized approach is now being considered. The new approach would relate the protection zone with the type of resource and the visual characteristics of the National Register site.

*Cemetery Protection* - There is a cemetery, which appears to be situated within the county section of the site. The cemetery at McLeod would require relocation prior to any development activities. County code states that it is a misdemeanor for the willful desecration of any gravesite. State Law (Section 27-43-10 -- 27-43-40) outlines a procedure for removing abandoned cemeteries. An applicant must first make an effort to locate descendants of the individuals buried in the cemetery through advertising or, if names are known, contacting relatives. The county will issue an approval to remove once an appropriate plan has been presented.

## 3.7 Archeological Resources

This report presents the findings of an archeological inventory conducted for McLeod Plantation, located on James Island, South Carolina. The archeological inventory was conducted with the recognition that at least certain aspects of McLeod's significant cultural heritage existed as archeological remains. The goals of the inventory were four-fold: (1) to consult knowledgeable archeologists and review existing archeological records concerning McLeod Plantation, (2) to review available historic cartographic images which might depict the locations of historic features on the plantation; (3) to conduct a field reconnaissance of the plantation in order to verify archeological sites locations and assess site potential across the plantation, and (4) to develop recommendations concerning the preservation and potential future research of these archeological remains. Section 3.7.1 discusses the material recovered through the review of archeological literature regarding McLeod Plantation. Findings of the historical study have been incorporated into an overall history of the site, Section 2.0. Section 3.72 offers the results of the archeological reconnaissance. Finally, Section 3.73 discusses the recommendations for preservation and potential future archeological research at McLeod Plantation.

### 3.7.1 Archeological Literature Review

The South Carolina Institute of Archaeology and Anthropology (SCIAA), South Carolina Heritage Trust, Charleston Museum, and Dr. Don Orth were all consulted to gather previously recorded information concerning McLeod Plantation. The site is listed in the South Carolina Archaeological Site Files at the SCIAA as 38CH679 under the name of "Morris." It was originally recorded on Christmas Eve Day, 1983 by Michael Hartley and Jolee Pearson of the SCIAA as a direct result of their survey of seventeenth-century sites along the Ashley River. Hartley and Pearson's survey focused on seventeenth-century remains at the site, however, their site form lists eighteenth-, nineteenth-, and twentieth-century materials as well, in addition to an "undetermined" Indian presence. Their site form states that "the site area for Morris is located on a ridge crest along the south side of Wappoo Cut. The slope (contour) of

the ground is very gradual...." Elsewhere within the site form they note that "the site of Morris lies predominantly in the soybean field at the front and west of the main house on the plantation." An attached sketch map to the site form shows two collection areas, "A" and "B," located within the agricultural fields at the intersection of Folly Road and the McLeod Plantation slave drive and at the intersection of the slave drive and the main house south lawn respectively. According to notes filed with the McLeod site form, these areas produced the greatest concentrations of seventeenth-century materials. The archeological site boundaries as shown on Hartley and Pearson's site form correspond with the plantation core, extending slightly north of Country Club Drive to the north, slightly east of the main plantation drive to the east, slightly south of the slave drive to the south, and to Folly Road to the west. The main house and agricultural outbuildings are not included in this configuration.

In the report prepared for the Ashley River survey, Hartley (1983:38) identified the seventeenth-century "Morris" component at McLeod Plantation as one of the five best seventeenth-century sites for archeological study along the Ashley River. Hartley wrote that McLeod Plantation:

> is an excellent site for consideration of seventeenth-century English activities in proximity to the harbor.... The site has returned a wide range of seventeenth-century material in the surface collection and should contain much data.

The site was revisited by Chris Judge of the South Carolina Heritage Trust in July of 1990 and a revised site form was submitted by Judge on July 24, 1990. This site form modifies Hartley and Pearson's site boundaries, extending the site limits to the east to encompass the main house and agricultural outbuildings and to the north to include the land and slave cemetery. Judge's attached sketch map shows the location of the reported "slave cemetery" northwest of the intersection of Country Club Road and the landing drive, while his field notes indicate a reported Deptford phase prehistoric site at the intersection of the landing drive and Country Club Road. (This prehistoric site location is also identified on the National Register form for McLeod Plantation). Judge identifies the site by the "McLeod Plantation" name on his revised site form. His field notes indicate that two shovel tests placed to the south of Country Club Road within the reported Deptford site location revealed extremely disturbed contexts and failed to produce artifacts or other indications of a prehistoric occupation. Mr. Judge is in the process of evaluating South Carolina's archeological sites for the Heritage Trust, and significant sites within the state are being scored and ranked to produce a preservation agenda and criteria. He indicates that McLeod has received a score of 308 out of 400; however, the relative position of McLeod as based on this rank will not be known until all sites have been scored.

Dr. Don Orth, a dentist currently residing in Erwin, Tennessee, possesses substantial archeological collections produced from McLeod Plantation, primarily as a result of surface collections made in the agricultural field south of the main house. Telephone conversations with Dr. Orth have been pursued concerning his studies at McLeod Plantation, and field trip to review Dr. Orth's materials at his home in Erwin Tennessee is currently in planning. Dr. Orth indicates that the bulk of his materials was recovered from within the agricultural field immediately bounding the slave street. It is his opinion

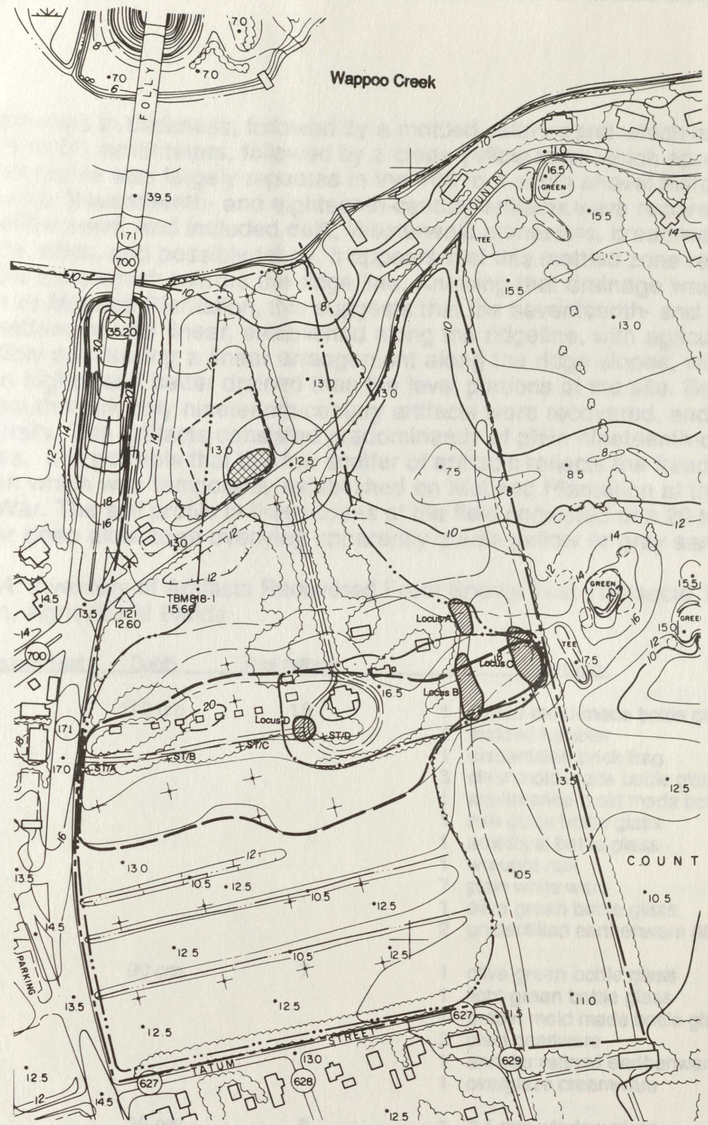
that the ridge which underlies the slave street served as the route of a Colonial roadway which he has identified on unspecified historic maps. Dr. Orth states that the density of materials along this ridge within the agricultural field is extremely high, and he calculates that he has collected several thousand artifacts from surface exposures within this area. By his estimation, as confirmed by Martha Zierden, much of this collection dates to the eighteenth century and some to the seventeenth. Regarding other archeological resources on the property, Dr. Orth relayed the recollections of Mr. Willie McLeod concerning an Indian site located on Wappoo Creek which had been destroyed by bridge construction. Dr. Orth felt it was possible that the site had been on McLeod land and destroyed by the construction of the bridge which currently carries SC 171 across Wappoo Creek. According to Dr. Orth, during construction excavations at this site an intact pot was found, but was dropped and broken by one of the workers. This pot may be represented by the large Deptford sherds currently in the McLeod house. Dr. Orth also recalled that one of the names on the tombstones within the McLeod "slave" cemetery was "Tewes," who he identified as a former owner of the plantation. The name Tewes has not been identified to date by historical research conducted for this project, however, if Dr. Orth is correct, than this occupancy would predate the McLeod and Lightwood ownership of the plantation, and thus date to the eighteenth century. A partial inventory of Dr. Orth's collection within the South Carolina site files provides further evidence that all three centuries are represented, with items such as a 1767 coin and "Revolutionary" buttons providing testimony to the eighteenth-century occupation of McLeod.

### 3.7.2 Archeological Reconnaissance

Archeological findings at the McLeod Plantation are noted on Map 5: Archeological Resources. An archeological reconnaissance of the 49.2 acre McLeod Plantation site was conducted to confirm the location of previously recorded archeological sites and provide initial assessments of the potential of other areas on the plantation to contain archeological remains. As previous archeological studies at McLeod Plantation provided an association between the agricultural fields which form the southern portion of the property and the site's seventeenth-century occupation, it was determined that a systematic survey of these fields was necessary. Therefore, the first task of the reconnaissance called for a shovel-test survey of the plowed fields.

A baseline was established along the south side of the slave street, with the third oak from the west serving as the point of origination. Transects were established at a 200 foot interval from this point and oriented north-south. Four transects were required at this spacing, the last of which abutted the hedge surrounding the main house south lawn. These transects were designated A-D. Shovel tests were dug at the 0, 100, 200, 400, and 600 foot south intervals along each of these transects, with all fill being screened through 1/4 inch mesh hardware cloth for artifact recovery.

These transects indicate that the archeological site extends across the full width of the field, and 18 of the 20 shovel tests excavated produced positive results. Seventeenth/eighteenth-century materials appear to be closely associated with the ridgeline, however *(Figure 3.A)*. All of the 0 south shovel tests produced artifacts, with those on transects A and B yielding relatively deep deposits and seventeenth-century artifacts. The stratigraphy within these shovel tests revealed a plow zone/humus of 20




# Archeological Resources

## *McLeod Plantation*

*James Island, South Carolina*

MAP 5

0 25 50 75 100 150 200 300
Scale in Feet

North

*Historic Charleston Foundation*
*Charleston, South Carolina*

JAEGER PYBURN
Planning
Architecture
Historic Preservation
Landscape Architecture
119 Washington Street
Gainesville, Georgia 30501 404/534-7004

NEW SOUTH ASSOCIATES
Archeology

ROBERT CHARLES LESSER
Real Estate Analysis

to 25 centimeters in thickness, followed by a mottled yellow sand which extended to a depth of 70 to 80 centimeters, followed by a clean yellow sand which appeared to be sterile. This profile was largely repeated in the 100 foot south shovel tests along all four transects. Seventeenth- and eighteenth-century artifacts were recovered from the mottled yellow sand, and included delft, Westerwald stoneware, creamware, colonoware, brick, and possibly tabby. It appears that this mottled zone represents a buried plow zone which mirrors the ridge line. Knowing that drainage was historically a problem at McLeod Plantation, this suggests that the seventeenth- and eighteenth-century settlement was linear, established along the ridgeline, with agricultural fields also possibly possessing a linear arrangement along the ridge slopes, which would have been higher and better drained than the level portions of the site. Beyond the 200 foot south mark only nineteenth-century artifacts were recovered, and at a much lighter density. The artifacts consisted predominantly of plain nineteenth-century whitewares. It is possible that this low scatter of artifacts reflects the freedmen village occupation which was temporarily established on McLeod Plantation at the close of the Civil War. The soil profile in these areas of the field consisted of a 20 to 30 centimeter deep plow zone overlying apparently sterile yellow or grey sand.

*Figure 3.A:* Inventory of Artifacts Recovered From Shovel Test Transects, McLeod Plantation, Agricultural Fields

| Transect/Shovel Test | Depth | Total Artifacts | Inventory |
|---|---|---|---|
| A/0 | 110 cm | 18 | 1 amber mold-made bottle glass |
| | | | 1 molded tumbler |
| | | | 1 unidentified brick frag |
| | | | 3 clear mold made bottle glass |
| | | | 1 aquamarine mold made bottle glass |
| | | | 1 milk glass bottle glass |
| | | | 1 amethyst bottle glass |
| | | | 1 wrought nail |
| | | | 7 plain white ware |
| | | | 1 olive green bottle glass |
| | | | 2 unidentified earthenware (Italian majolica?) |
| A/100 | 90 cm | 7 | 1 olive green bottle glass |
| | | | 1 light green bottle glass |
| | | | 1 amber mold made bottle glass |
| | | | 2 plain pearlware |
| | | | 1 annular refined earthenware |
| | | | 1 overglaze creamware |
| A/200 | 35 cm | 3 | 1 2.1 mm window glass |
| | | | 2 plain pearlware |
| | | | 1 aquamarine bottle glass |
| A/400 | 26 cm | 0 | Sterile |
| A/600 | 21 cm | 2 | 1 cobalt blue underglazed pearlware |
| | | | 1 fine black glazed redware |
| B/0 | 68 cm | 25 | 2 bone fragments |
| | | | 1 2.0 mm window glass |
| | | | 1 Westerwald stoneware sherd |
| | | | 1 aquamarine bottle glass |

| | | | | |
|---|---|---|---|---|
| | | | 1 | Amethyst mold made bottle glass |
| | | | 1 | plain Creamware |
| | | | 3 | olive green bottle glass |
| | | | 2 | brick fragments |
| | | | 1 | clear mold made bottle glass |
| | | | 1 | plain Pearlware |
| | | | 1 | red painted rim Colonoware |
| | | | 3 | unidentified nail fragments |
| | | | 1 | chrome handle |
| | | | 1 | window latch ? |
| | | | 1 | unidentified metal object |
| | | | 1 | banded Pearlware |
| | | | 1 | glazed stoneware |
| | | | 1 | mortar |
| | | | 1 | decorated metal disk |
| B/100 | 72 cm | 11 | 2 | brick fragments |
| | | | 1 | Clear yellow slipware |
| | | | 2 | ball clay pipe bowl fragments |
| | | | 1 | aquamarine mold made bottle glass |
| | | | 1 | plain whiteware |
| | | | 1 | plain Pearlware |
| | | | 1 | light green bottle glass |
| | | | 1 | wrought nail fragment |
| | | | 1 | Colonoware (Catawba?) fragment |
| B/200 | 32 cm | 1 | 1 | unscalloped unimpressed Pearlware |
| B/400 | 36 cm | 2 | 1 | plain Pearlware |
| | | | 1 | unidentified decoration Pearlware |
| B/600 | 22 cm | 0 | Sterile | |
| C/0 | 38 cm | 3 | 1 | amber container glass |
| | | | 1 | plain pearlware |
| | | | 1 | cobalt blue underglaze painted refined earthenware |
| C/100 | 45 cm | 8 | 4 | brick fragments |
| | | | 1 | olive green wine bottle glass |
| | | | 1 | olive green case bottle glass |
| | | | 1 | 1.9 mm window glass |
| C/200 | 22 cm | 2 | 2 | brick fragments |
| C/400 | 25 cm | 1 | 1 | plain Creamware |
| C/600 | 23 cm | 3 | 2 | brick fragments |
| | | | 1 | plain Ironstone |
| D/0 | 42 cm | 7 | 3 | bone (1 burnt) |
| | | | 2 | mortar |
| | | | 1 | cinder |
| | | | 1 | burnt glass |
| D/100 | 46 cm | 2 | 1 | 22 caliber rimfire cartridge |
| | | | 1 | unidentified nail |

| | | | | |
|---|---|---|---|---|
| D/200 | 26 cm | 1 | 1 | plain Pearlware |
| D/400 | 26 cm | 1 | 1 | plain late refined earthenware |
| D/600 | 26 cm | 1 | 1 | plain late refined earthenware |

Two shovel tests were dug across the ridgeline (north of the agricultural field) along transect C, and designated -100 and -200 respectively. Both of these tests produced nineteenth-century deposits and relatively shallow stratigraphy which did not possess the buried plow zone. This may indicate that the ridge top was not used agriculturally, but also suggests that the seventeenth-century occupation is not particularly intense along the ridge at this particular point.

Two shovel tests were excavated south of Country Club Road in the reported Deptford site, and produced the same results noted by Christopher Judge of the South Carolina Heritage Trust. A 50 to 60 centimeter deposit of mixed and mottled clay was found in both tests, followed by a buried A horizon to the west of the landing drive and sterile yellow sand to the east. To the west this A horizon extended an additional 20 centimeters before the sterile sand was encountered. No cultural artifacts were noted in either unit. A light scatter of oyster shell was recognized in the buried A horizon in the western test unit. Additional shovel tests were placed at the landing; one within the landing drive and a second on the west embankment. The unit at the landing drive produced a single nineteenth-century whiteware sherd, while no artifacts were encountered from the embankment. The profile on the embankment suggests that this represents the natural landform, and not a cultural deposit, although this unit was placed near Wappoo Creek where the height of the embankment over the landing drive is not so great.

Efforts were made to identify tombstones within the reported slave cemetery, however, none could be located. It should be noted that this area has been heavily disturbed by post-Hugo clearing, that a substantial pile of dead wood has been pushed up onto the site area, and that vines and briars are substantial in the areas not covered with such dead wood. Reconnaissance was mostly of the "hands and knees" variety; however, even this form of movement was extremely restricted. Definition of the cemetery will most likely require substantial clearing and the use of heavy equipment if this area is not included within the preservation boundaries. The identification of potential historic grave locations could be accomplished through a ground-penetrating radar survey, however, the cemetery area would need to be cleared of all above-ground vegetation and litter before such a survey could be accomplished. As noted above, Dr. Orth recalled that one of the tombstones marked the grave of a "Tewes" family member. The South Carolina Archives and History site form completed for this cemetery prior to Hugo does not list the tombstone inscriptions and the site recorder does not recall this information.

Surface reconnaissance was directed toward the bulldozer paths which cut across much of the plantation. Several sites were identified in this manner. Deptford materials were found from the bulldozer cut directly south of the reported slave cemetery, and thus within the broad circle indicated by Judge as a possible Deptford site location.

No shovel tests were placed in this location due to the possible presence of human remains. These sherds do, however, support the presence of the Deptford site as suggested by oral tradition. As mentioned, Dr. Orth reports the destruction of a Deptford site during bridge construction which suggests that such site was located at the Wappoo Creek crossing. The Deptford materials defined adjacent to the cemetery thus may represent an extension of this site.

Additional surface reconnaissance was all conducted to the east of the landing drive/main house complex/agricultural field where two parallel bulldozer paths exist. Three site loci were identified along these routes. Locus A was defined by the presence of a scatter of nineteenth-century ceramics, glass, and some brick fragments to the east of the gin house. Given the proximity of this locus to the other agricultural outbuildings, this site area perhaps represents an additional nineteenth-century outbuilding location. Artifacts recovered from Locus A are enumerated in *Figure 3.B* below.

*Figure 3.B:* Artifacts Recovered from Locus A, McLeod Plantation

| Artifact Type | Quantity |
|---|---|
| Plain Pearlware | 1 |
| Plain late refined earthenware | 3 |
| Alkaline glazed stoneware | 1 |
| Olive green bottle glass | 3 |

Locus B was defined on the ridge slopes and crest directly east of the main house. Delft and combed yellow slipware fragments indicate a seventeenth to eighteenth century component at this locus, while additional artifacts included colonoware, creamware, whiteware, bottle glass, and fairly numerous brick fragments. This occupation would thus appear to date from the late seventeenth/early eighteenth centuries through the nineteenth-century occupation of McLeod Plantation. The artifacts recovered from this locus are listed in *Figure 3.C.*

*Figure 3.C:* Artifacts Recovered from Locus B, McLeod Plantation

| Artifact Type | Quantity |
|---|---|
| Metapodial | 1 |
| Mandible | 1 |
| Window glass (varying thicknesses, 1.3 to 2.4 mm) | 5 |
| Ball clay pipe stem fragment (6/64 inch bore) | 1 |
| Olive green wine bottle glass | 2 |
| Clear bottle glass | 1 |
| Scalloped rim impressed straight line green edged Pearlware | 1 |
| Combed yellow slipware | 1 |
| Clear yellow slipware | 1 |
| Transfer printed earthenware | 3 |
| Plain Delft | 1 |
| Plain Pearlware | 2 |
| Annular late refined earthenware | 1 |
| Molded transfer printed Pearlware | 1 |

| | |
|---|---|
| Transfer printed Pearlware | 2 |
| Grey salt glazed stoneware | 1 |
| Molded late refined earthenware | 1 |
| Plain Creamware | 5 |
| Handpainted underglaze Pearlware | 1 |
| Unglazed redware | 1 |
| Unglazed earthenware | 1 |
| Brick fragment | 1 |
| Canton Porcelain | 1 |
| Plain late refined earthenware | 3 |
| Flat metal with bullet hole present | 1 |
| Total | 40 |

While no other artifact occurrences were defined along this bulldozer path, a row of oaks suggesting the former location of an oak alley was located on the east edge of the subdivision south of the plantation property. As only one line of oaks was identified, it seems likely that the other side of this road would have been within the developed subdivision. This row contained several old (ca. 200 year) oaks as well as smaller secondary growth. The possible significance of this oak row is discussed in the conclusions, below.

A third archeological site, Locus C, was also identified along the ridgeline, this time within the bulldozer path which immediately abuts the Charleston Country Club golf course. Again, seventeenth- through nineteenth-century materials were recovered from this locus. The late seventeenth/eighteenth-century component of this locus was more clearly defined than elsewhere on the property, and white salt glazed stoneware sherds were recovered from this area in addition to delft, combed yellow slipware, creamware, and whiteware. These artifacts are shown in *Figure 3.D* below.

*Figure 3. D:* Artifacts Recovered from Locus C, McLeod Plantation

| Artifact Type | Quantity |
|---|---|
| Blue and white Delft | 1 |
| Cobalt blue salt glazed stoneware | 1 |
| Clear yellow slipware | 2 |
| Combed yellow slipware (one with piecrust rim) | 2 |
| Plain Colonoware | 2 |
| White salt glazed stoneware | 2 |
| Plain Creamware | 5 |
| Plain Pearlware | 1 |
| Cobalt blue hand painted Pearlware | 1 |
| Transfer printed late refined earthenware | 1 |
| Rosehead nail fragment | 1 |
| Unidentified metal | 3 |
| Eroded earthenware sherd (Colonoware?) | 1 |
| Total | 23 |

A final locus was identified on the basis of surface occurrences of brick and possibly tabby in association with seventeenth-, eighteenth-, and nineteenth-century artifacts. This locus is present within the slave drive, in the curve of the drive which leads to its

connection with the landing drive. Mortared brick and tabby (or large surfaces of mortar employing crushed shell) are exposed at this location, and clear yellow slipware, wormy-finger painted annular ware, eighteenth-century bottle glass, and creamware were all recovered from this location. The position of these materials and architectural remains within one of the McLeod Plantation roadbeds suggests that this structure predates the 1851 McLeod purchase and occupation of the property, and also provides tangible evidence of the potential for subsurface preservation of archeological features elsewhere on the property. Artifacts recovered from surface occurrences within this locus are shown in *Figure 3.E* below.

*Figure 3.E:* Artifacts Recovered from Locus D, McLeod Plantation

| Artifact Type | Quantity |
|---|---|
| Olive green wine bottle glass | 3 |
| Amethyst bottle glass | 2 |
| Scalloped rim impressed straight lines green edged Pearlware | 1 |
| Clear yellow slipware | 1 |
| Clear yellow slipware handle fragment | 1 |
| Dotted yellow slipware ? | 1 |
| Blue glazed redware | 1 |
| Finger painted Pearlware | 4 |
| Creamware | 10 |
| Plain Pearlware | 1 |
| Plain Pearlware footring | 1 |
| Glazed sewer tile | 1 |
| Brown salt glazed stoneware | 1 |
| Glass tumbler fragment | 1 |
| Unglazed earthenware | 1 |
| Slag | 1 |
| Total | 31 |

As noted, this archeological reconnaissance surveyed only those areas previously reported as possessing archeological remains or areas with good surface exposure, such as the bulldozer cuts present to the east of the McLeod house. This reconnaissance, however, indicates a high correlation between the historic occupation of the site and the ridge line which underlies the main house and slave street. Seventeenth through nineteenth century materials occur along this ridge. It is thus likely that those areas of the ridge not inspected by the reconnaissance (eg. the segment between Loci B and C) would also contain archeological materials. As the project master plans indicate, the only area not receiving some degree of coverage was the portion of the McLeod property located to the southeast of the intersection of Country Club Road and SC Highway 171. As this area is relatively low-lying, the potential for archeological sites here appears to be limited.

### 3.7.3 Conclusions and Recommendations

The archeological and historical inventory of McLeod Plantation confirms the presence of seventeenth-, eighteenth-, and nineteenth-century archeological components on

this property. Of these, the seventeenth century is least well known. At present, the 1695 Thornton-Morden map and other contemporary variants supply only the association of a name, "Morris," with the plantation site. It is likely that "Morris" represents a small farmstead or nascent plantation, however, the full extent and locations of this settlement remain speculative. Late seventeenth- and/or early eighteenth-century materials were defined along the ridge across the full width of the plantation. Surface and subsurface survey failed to reveal any distinctive concentrations of such material along this ridge line, although Hartley and Pearson's earlier work would suggest concentrations at the west end of the slave drive and at the intersection of the slave drive and south lawn, while the current reconnaissance might also incorporate the Loci B and C positions into this settlement scheme. The presence of a buried plow zone extending some 100 to 200 feet south of this ridge into the agricultural fields suggests that this seventeenth-century settlement was indeed linear and placed along the ridge, with agricultural fields established along the ridge slopes. The approximate locations of structures, and/or the distinction between planter's housing and possible slave houses within this linear settlement cannot be made at present, and such distinction represents one of the primary goals of any future archeological fieldwork and historical documentary study at McLeod Plantation.

Cartographic materials are more forthcoming on the locations of eighteenth-century components, at least by the Revolutionary era. As is discussed previously, a historic plat showing the location of the Lightwood family main house and oak alley was recovered during the historical research. This plat indicates that the main access to the Lightwood Plantation was along an oak alley approaching the site from the south, and further shows unlined routes running to Wappoo Creek and in the direction of the current slave drive. It is suggested here that this oak alley may be partially preserved on the east edge of the subdivision which abuts McLeod Plantation to the south. Projecting from these extant oaks, the Lightwood main house would have been located due east of the McLeod main house, while a second structure would have been either under the McLeod house or to its west. Mr. Creighton Frampton reports that foundation remains were revealed to the west of the main house during previous utility work, and Locus D, discussed above, also supports the presence of architectural remains west of the main house. The lawn east of the McLeod main house supports several suspicious depressions and a squarish mound of earth. As with the seventeenth-century occupation of the site, the eighteenth-century Lightwood Plantation also appears to have placed much of its settlement along the ridgeline, as indicated by the occurrence of eighteenth-century artifacts in Loci B, C, and D and in shovel tests along the slave drive.

The major components of the nineteenth-century McLeod Plantation are obviously still visible; the archeological reconnaissance indicates however, that other (earlier?) nineteenth-century settlement locations exist on the plantation. These nineteenth-century materials are more broadly distributed across the plantation, although the major settlement components continue the association with the ridgeline noted for earlier occupations. The reported nineteenth-century slave cemetery is problematical from an archeological perspective. While individuals familiar with the cemetery indicate that only four tombstones were present within it, it is doubtful that these represent the full complement of individuals interred in this cemetery. Slave graves were rarely marked in a permanent medium, and were normally only identified by

wooden markers and/or burial artifacts. As one of the marked graves is reportedly that of school teacher associated with the freedmen village, who died shortly after the Civil War, it is possible that all four tombstones mark the locations of European-American burials and that the slave burial locations are unknown. The location of this cemetery is also a problem. While no comprehensive study has been made of slave cemetery locations on low country plantations, those of which we are familiar were generally located away from the main house focus and beyond the primary plantation roads. As the landing drive provided the main access to McLeod Plantation during the nineteenth century, the presence of the slave cemetery adjacent to this drive is curious. This may suggest that the cemetery predates the McLeods and exists from the Lightwood era when the main access was from the south. During this occupancy the cemetery would have been along a secondary path behind the main house focus, a location more in keeping with documented slave cemeteries. It is thus possible that this cemetery is both larger and older than suspected, and further archeological work will be necessary to fully define the cemetery location if this area is beyond the preservation boundary.

Evidence of the post Civil War freedmen village exists as an ephemeral scatter of nineteenth-century artifacts within the agricultural fields. Given that this occupation was temporary and constrained by the limited resources of the war, it is unrealistic that any more intensive occurrence of historic artifacts should be expected. There is some possibility for subsurface features from this encampment which may survive below the plow zone.

The Deptford site area is where reported, although this area appears to have received disturbance historically. At least one oral historical account suggests that the main focus of this site may have been within the route of SC Highway 171 where it crosses Wappoo Creek, with the materials currently exposed and discussed representing an extension of this site. This extension also appears to have been disturbed. Mr. Willie McLeod provides some interesting commentary in a 1978 newspaper article which may be of relevance to this site. Mr. McLeod notes that when the automobile first came to James Island in circa 1905, the sand roads of the island led to many a car getting stuck in the sand. In response to this, Mr. McLeod says that "in some places the farmers would plow furrows and put in mud and oyster shells so that the auto's wheels would touch the road. People ruined an old Indian mound here digging out sand and shells. Its a pity they did that" (emphasis added). It is uncertain whether Mr. Willie's "here" refers to McLeod Plantation or James Island in general, although given the disturbance noted in portions of the Deptford site, such an explanation may apply.

In total, much of the current McLeod property must be regarded as an archeological site, with the greatest intensity of materials and research potential focused on the ridgeline which cross-cuts the plantation from east to west. The cemetery location may be larger and older than is currently believed, but definition of the cemetery can only be accomplished by removing the current Hugo overburden and machine stripping or cross-trenching the area to confirm grave locations. The nineteenth-century Freedman village is represented by a low density scatter of artifacts across the agricultural field, although given the shallow depths of the plow zone there is fair to good potential that subsurface cultural features from this occupation could be present. The Deptford area

appears to be largely disturbed, although there may also be some potential for cultural features to be present below the disturbed area.

McLeod Plantation thus possesses excellent resources through which to address the adaptation and evolution of historic settlement in the Charleston area. The site's setting, and the possible future development of a McLeod Plantation Museum and interpretive display suggest that a program of public archeology aimed at recovering and relaying information about the changing lives of seventeenth-, eighteenth- and nineteenth-century Charlestonians could mesh well with the development of McLeod Plantation as an interpretive research center. Such a program of public archeology should include both static and active displays. Historic maps, photographs, and other documents could be used in conjunction with exposed and stabilized foundation remains and other archeological features to create a series of landmarks documenting the development, growth, and change of McLeod Plantation. Such static open air displays could be supplemented by additional materials, including artifacts, to be housed within any interpretive center or museum which might be developed on the property. The active element of this public program would in most instances predate such formal presentations, and would consist of an ongoing, multi-year project geared toward excavating and interpreting McLeod's archeological heritage. Such excavations should be scheduled for the summer months, when tourism is greatest, and site tours and question and answer discussions with the public should be made a part of the tourist appeal for visiting McLeod. Such a program would be likely to add to the incentive for visiting McLeod Plantation, and would provide McLeod with an attraction not currently offered (or available) at other Charleston area historic sites. Given the College of Charleston's involvement with the property, the most logical means of carrying out such an archeological study would be through the College's Anthropology Department, with students' involved in an archeological field school providing excavators for at least part of the field season. Other sources of labor which could be tapped would include Earthwatch and other similar programs in which volunteers pay to work on an archeological site. Given the age of McLeod Plantation, the presence of African-American as well as European-American cultural remains, and the potential of the site to be incorporated in public interpretive programs, the prospects for funding to help support these excavations through such agencies as the National Endowment for the Humanities, National Science Foundation, National Geographic Society, and/or the South Carolina Department of Archives and History would appear to be favorable.

We recommend that prior to developing a full scale archeological research plan for McLeod Plantation, an intensive archeological survey and limited testing evaluation of the area to be preserved be conducted. While the reconnaissance study reported herein has confirmed the presence of archeological remains on the property, it is felt likely that national funding agencies would require more substantive evidence of this site's ability to address salient research concerns. The site should be shovel tested at a 10 meter interval, and from five to ten 2 x 2 meter formal test units should be dug to examine areas with the best potential for containing intact seventeenth-, eighteenth-, and nineteenth-century remains. Additional historical research should also be conducted at this time, in order to develop as complete a chain-of-title for the property as possible and also to begin to paint a more complete

picture of the site's various historic occupants. It is considered highly probable that such a project could be financially supported by the South Carolina Department of Archives and History, especially if the educational elements of the work, its potential contribution to African-American history, and the need for such funding to develop a long-term research plan were emphasized.

## 3.8 Architectural Resources

Map 6: Architectural Resources illustrates the buildings located within the McLeod site. Historic structures include the following: (1) Plantation House; (2) Kitchen; (3) Dairy Building; (4) five Slave Cottages; (5) Large Plantation Labor Cottage; (6) Carriage House/Garage; (7) Privy; (8) Cotton Gin House; and (9) Barn. Also noted on the map is the location of the original landing at Wappoo Creek; the site of a former store building; and the current City of Charleston Fire Station.

**3.8.1 Plantation House -** The two-and-one-half story McLeod Plantation House was constructed c.1854-1858 at the intersection of two oak allees, directly to the west of the former Lightwood Plantation main house. Rectangular in shape and featuring a side-gable roof, the house rests on a brick pier foundation and is of frame construction with a weatherboard exterior. Windows are six-over-six double hung sash flanked by functional shutters. The original central hall plan is intact, retaining an open stairwell. The major alterations to the house were carried out in 1925, when the orientation was changed from the south to the north elevation. The north facade retains a one-story, full-width porch featuring supporting columns and a balustrade with turned balusters. The south facade now exhibits two-story pedimented gable portico with a Palladian entrance surround and balcony. Also undertaken in 1925 was a pantry and kitchen addition to the east side of the house.

**3.8.2 Kitchen -** The kitchen building is a one-story rectangular-shaped frame structure sided with weatherboard. It features a side-gable roof with pedimented gable ends, two board-and-batten doors, window shutters (also board-and-batten) with iron strap hinges, six-over-six sash windows and a large centrally-positioned brick chimney. The building rests on a brick pier foundation.

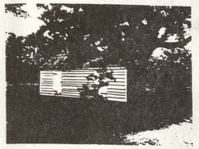
**3.8.3 Dairy Building -** Similar in size and appearance to the kitchen, the dairy building is also a one-story rectangular-shaped frame structure with weatherboard siding. Its roof is also of the side-gable variety but lacks pedimented gable ends as seen on the kitchen. The dairy building exhibits a single board-and-batten door, board-and-batten window shutters and a single exterior end brick chimney. It rests on a brick pier foundation.

**3.8.4 Slave Cottages -** The five extant one-room slave cottages at McLeod Plantation are virtually identical. All are rectangular-shaped, single-story frame dwellings sided with weatherboard. Each cottage features a side-gable roof, a single board-and-batten door, six-over-six sash windows with board-and-batten shutters and a single exterior end brick chimney. The cottages all rest on brick pier foundations. Several sources indicate that a group

Site Landing

Site of Store

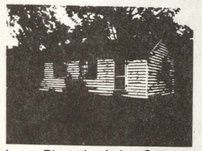
Fire Station



Dairy Building



Kitchen



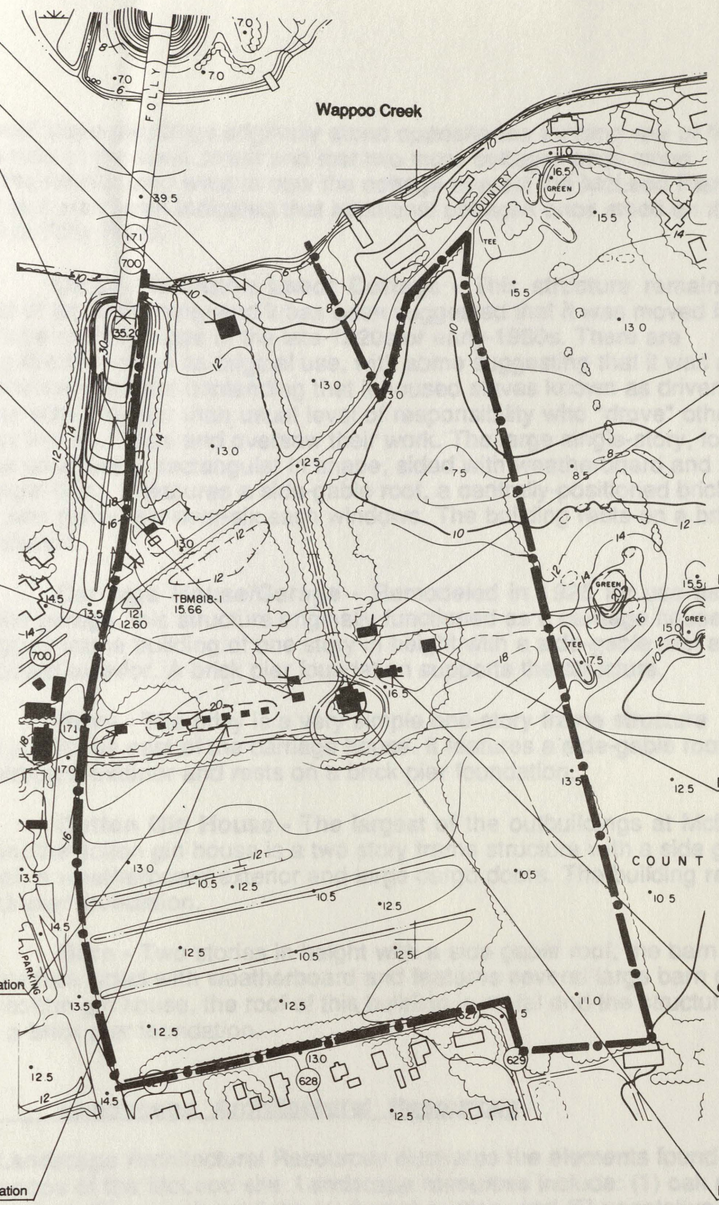
Large Plantation Labor Cottage



Typical Slave Cottage/Rear Elevation



Typical Slave Cottage/Front Elevation




Gin



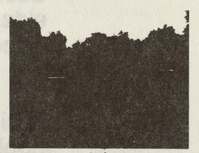


Plantation House/North Elevation



Barn

Carriage House/Garage





Plantation House/South Elevation

# Architectural Resources

## *McLeod Plantation*

*James Island, South Carolina*

**MAP 6**

0 25 50 75 100 150 200 300

Scale in Feet

North

*Historic Charleston Foundation*
*Charleston, South Carolina*


JAEGER PYBURN

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Architecture
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NEW SOUTH ASSOCIATES
Archeology

ROBERT CHARLES LESSER
Real Estate Analysis

of additional slave dwellings originally stood opposite the existing row of five on the south side of the slave street and that two more cottages once stood between the kitchen and what is now the cottage nearest the McLeod Plantation House. It has also been indicated that additional cottages once stood on the west side of Folly Road.

**3.8.5 Large Plantation Labor Cottage -** This structure remains somewhat of an uncertainty and it has been suggested that it was moved from the west side of Folly Road in the late-1920s or early-1930s. There are conflicting theories as to its original use, with some suggesting that it was a slave kitchen and others contending that it housed slaves known as drivers, individuals with a higher than usual level of responsibility who "drove" other slaves out into the fields and oversaw their work. The large single-story, four-bay frame structure is rectangular in shape, sided with weatherboard and has only a single door. It features a side-gable roof, a centrally-positioned brick chimney and paired six-over-six sash windows. The building rests on a brick pier foundation.

**3.8.6 Carriage House/Garage -** Remodeled in 1925 for use as an automobile garage, this structure originally functioned as a carriage house. It is a rectangular frame building of one story in height with a side-gable roof and a weatherboard exterior. A brick pier foundation supports the structure.

**3.8.7 Privy -** The privy is a very simple one-story frame structure standing just to the east of the carriage house. It features a side-gable roof and a weatherboard exterior and rests on a brick pier foundation.

**3.8.8 Cotton Gin House -** The largest of the outbuildings at McLeod Plantation, the cotton gin house is a two story frame structure with a side gable metal roof, a weatherboard exterior and large cargo doors. The building rests on a brick pier foundation.

**3.8.9 Barn -** Two stories in height with a side gable roof, the barn is a frame structure sided with weatherboard and features several large barn doors. Like the cotton gin house, the roof of this building is metal and the structure rests on a brick pier foundation.

## 3.9 Landscape Architectural Resources

Map 7: Landscape Architectural Resources illustrates the elements found within the landscape of the McLeod site. Landscape resources include: (1) oak allees; (2) the landing; (3) agricultural field; (4) formal garden; and (5) vegetative cover.

**3.9.1 Oak Allees** - There are two intact oak allees within the site and a row of oaks, believed to be a fragment of an earlier allee. The two intact allees include Landing Drive, extending from the plantation house north to Wappoo Creek, and Slave Street, extending from the plantation house west to Folly Road and bordered by the slave cottages on the north. Both allees contain

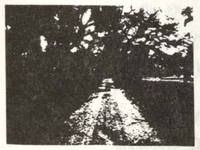


Landing



Oak Allee/Landing Drive

Hardwoods
Hugo Damage

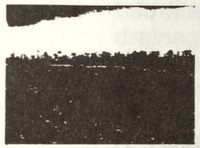


Oak Allee/Main Entrance

Grape Arbor

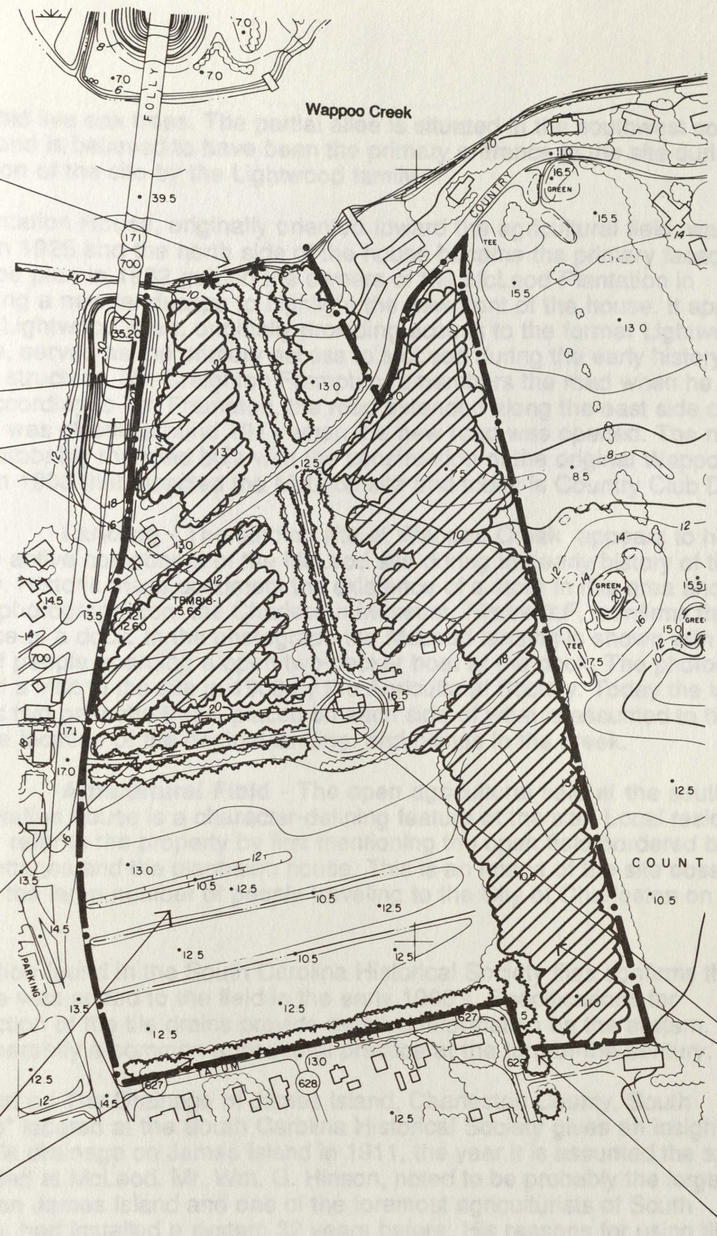


Slave Street



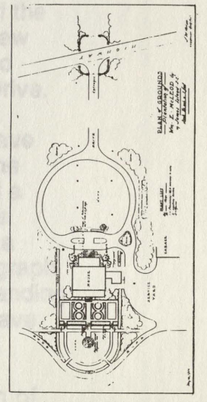
Agricultural Field
Tile Drainage System

Hedgerow






Pre 1932 Garden



1932 Garden Plan
Loutrell Briggs
Landscape Architect



Formal Garden

Hardwoods
Hugo Damage



Lightwood Oak Allee

# Landscape Architecture Resources

MAP 7

0 25 50 75 100 150 200 300
Scale in Feet

North

## *McLeod Plantation*

*James Island, South Carolina*

*Historic Charleston Foundation*
*Charleston, South Carolina*

JAEGER PYBURN

Planning
Architecture
Historic Preservation
Landscape Architecture

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Archeology

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Real Estate Analysis

century-old live oak trees. The partial allee is situated in the southwest corner of the site and is believed to have been the primary entrance to the site during the occupation of the site by the Lightwood family.

The Plantation House, originally oriented toward the agricultural field, was altered in 1925 and the north side of the house became the primary facade. A landscape plan in 1932 guided the owners of the McLeod Plantation in developing a new landscape to highlight the new front of the house. It appears that the Lightwood allee, originally providing access to the former Lightwood structure, served as the primary access to McLeod during the early history of the McLeod structure. Mr. Creighton Frampton remembers the road when he was a child. According to Mr. Frampton, the road extended along the east side of the site and was closed around 1911 when the new road was opened. The new road is probably the road built with the construction of the original Wappoo Bridge in 1908 that bisected the McLeod site and today is Country Club Drive.

**3.9.2 Landing** - The landing site at Wappoo Creek appears to have been an active component of the McLeod site during the early history of the property. Historic maps document the existence of a store in this area and a historic photograph from the Charleston Museum, *Figure 3.F*, confirms the existence of a dock. In the photograph the McLeod landing is shown with a group of people boarding a open two-decker boat at the dock. The photograph depicted a visit to the site in 1903 by the Agricultural Society. Today the landing contains two palmetto trees, placed on each side of what is assumed to have been the location of the original landing, and pilings in the creek.

**3.9.3 Agricultural Field** - The open agricultural field at the south of the plantation house is a character-defining feature of the site. Local residents typically refer to the property by first mentioning the open field bordered by the slave cottages and the plantation house. This is an image of the site observed daily by the large number of people traveling to the City of Charleston on Folly Road.

Information found in the South Carolina Historical Society files confirms that tile drainage was added to the field in the early 1900's. Specifications for construction of the tile drains provide detailed information on the system. This was apparently a common agricultural practice at the turn-of-the-century.

A "Report on The Drainage of James Island, Charleston County, South Carolina" located at the South Carolina Historical Society gives an insight to the use of tile drainage on James Island in 1911, the year it is assumed the system was added at McLeod. Mr. Wm. G. Hinson, noted to be probably the largest planter on James Island and one of the foremost agriculturists of South Carolina, had installed a system 32 years before. His reasons for using tile drainage was "to improve the sanitary conditions surrounding his home that occupancy during summer months should not be detrimental to health, as well as to increase the agricultural value of his lands. In both endeavors, he had been successful." His success had come after much experimentation.

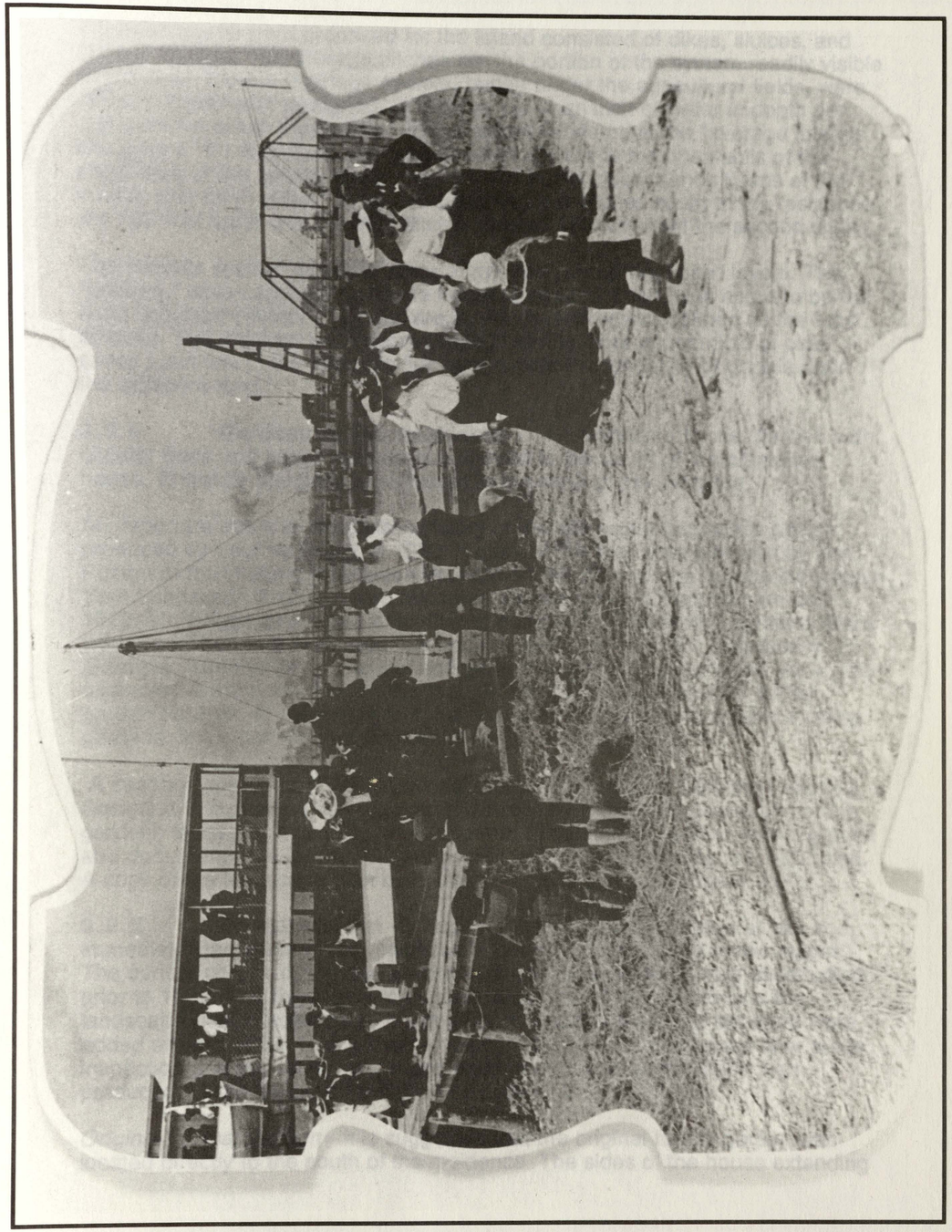


*Figure 3.F:* Landing at Wappoo Cut, Agricultural Picnic, 1903 (Courtesy, Charleston Museum)

The drainage system proposed for the Island consisted of dikes, sluices, and storage ditches. The storage ditches are the portion of the system readily visible at McLeod. The tile drainage system, buried under the agricultural fields, were noted to have been designed "to remove 1/4 of an inch of water in depth per day from the areas they serve." It was recommended that the "average laterals be spaced 100 feet apart, perhaps somewhat more in the open soils of the south side of the Island, and somewhat less in the closer sandy loams of the interior and north sides." At McLeod, the first two ditches south of the residence are 100 feet apart and the third ditch is located 150 feet from the second ditch.

The Island's system followed either a "gridiron" or "herringbone" layout. The "gridiron," which appears to be the layout used at McLeod, was noted to be the most desirable method. " On flat areas, this system was described as the most efficient. This method was recommended "as it is more economical of pipe, saves junctions in the main tile line, and avoids the tendency to double drain the adjacent land."

**3.9.4 Gardens at the Residence -** An elaborate formal garden with circular beds and paved walkways is located to the south of the plantation house. Entrance plantings are situated to the north of the structure.

An important event in the garden history of the site was a landscape design produced by Loutrell Briggs in 1932. A copy of this plan was provided by Jon Poston of the Historic Charleston Foundation. Mr. Briggs was a prominent New York Landscape Architect who relocated his practice to Charleston around 1929. Mr. Briggs developed a number of designs for Charleston gardens. Many were described and illustrated in a book he authored in 1951, *Charleston Gardens.* Unfortunately, the McLeod garden was not included in the book. The examples in the book do illustrate that Mr. Briggs had a respect for earlier garden designs. In many projects, his new design would work around existing gardens. It is surmised that this was the case at McLeod.

A second copy of the 1932 plan was located at the South Carolina Historical Society and contained notes apparently made by Briggs. A comparison of the gardens today with the 1932 plans appears to confirm the earlier formal garden and documents the landscape design that was added following the 1932 plan. A copy of the landscape plan by Loutrell Briggs is attached *(Figure 3.G).*

**3.9.5 Formal Garden** - It appears that the formal garden at McLeod, immediately adjacent to the residence at the south, developed in two stages. The central portion of the garden containing the circular beds was constructed prior to 1932. The expansion to the central portion of the garden and the landscape design adjacent to the drive on the north side of the structure were added around 1932. This "garden evolution" theory was developed after a site inspection and the review of historic photographs and a landscape plan, produced for the McLeod Plantation by Loutrell Briggs in 1932.

*Original Formal Garden* - It is suggested that the original formal garden was located directly to the south of the residence. The sides of the house extending

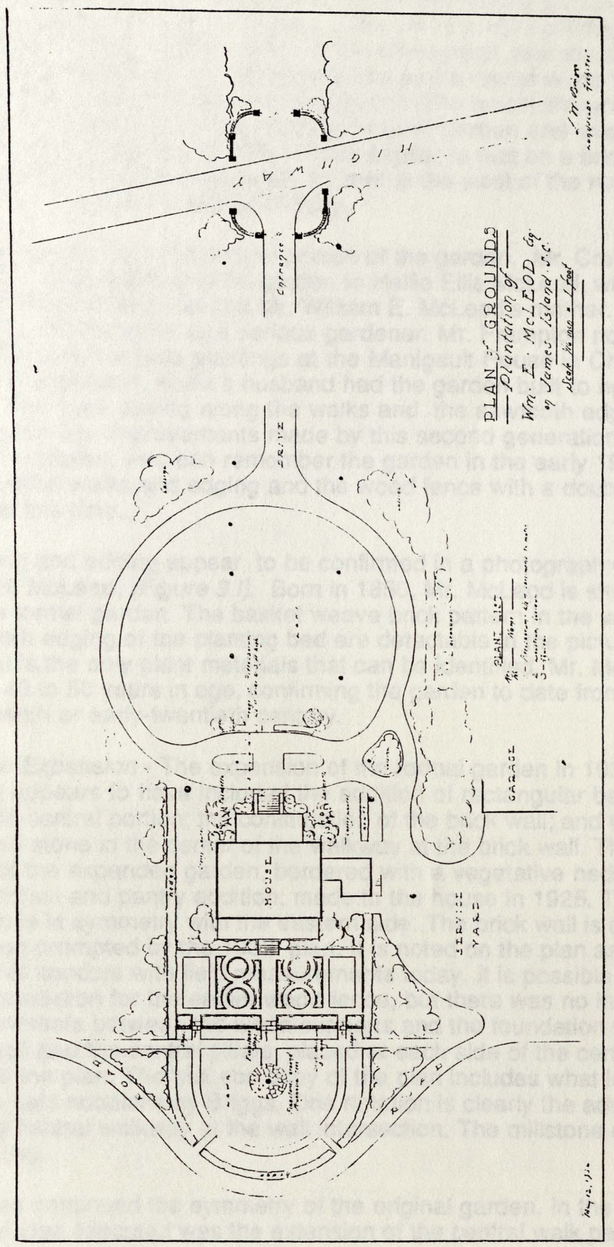



*Figure 3.G:* Landscape Plan, Loutrell Briggs, Landscape Architect, 1932 (Courtesy, Historic Charleston Foundation)

outward would enclose this original garden. The garden was enclosed by a wood picket fence painted white. The fence is shown in a 1903 photograph of the grounds of the property, *(Figure 3.H)*. In the photograph, members of the Agricultural Society are picnicking on the grounds and a row of wood timbers appear to be drying for a future construction project. The fence, shown in the photograph, encloses an area larger than the original garden and extends toward the north side of the house. The pickets appear to rest on a brick base. The photograph also shows the centuries old oak to the west of the house, still a landmark landscape feature at McLeod today.

It is difficult to precisely date the central portion of the garden. Mr. Creighton Frampton credits most of this original garden to Hallie Ellis McLeod, wife of the second William Wallace McLeod and Mr. William E. McLeod's mother. Mrs. Hallie McLeod is remembered as a serious gardener. Mr. Frampton noted that Hallie was involved in the bulb plantings at the Manigault House in Charleston. According to Mr. Frampton, Hallie's husband had the garden built to her specifications. The brick paving along the walks and the sawtooth edging encircling the beds are improvements made by this second generation of McLeods. Mr. Frampton, who can remember the garden in the early 1900's, states that the brick walks and edging and the wood fence with a double gate were existing at this time.

The brick paving and edging appear to be confirmed in a photograph of Mr. William Wallace McLeod, *(Figure 3.I)*. Born in 1850, Mr. McLeod is shown standing in the formal garden. The basket weave brick pattern in the walkway and the sawtooth edging of the planting bed are detectable in the picture. An aspidistra plant is the only plant materials that can be identified. Mr. McLeod appears to be 40 to 50 years in age, confirming the garden to date from at least the late-nineteenth or early-twentieth century.

*Formal Garden Expansion* - The expansion of the formal garden in 1932 by Loutrell Briggs appears to have included the addition of rectangular beds to each side of the central portion; the construction of the brick wall; and the addition of a mill stone in the center of the walkway at the brick wall. The eastern edge of the expanded garden, bordered with a vegetative hedge, is in line with the kitchen and pantry addition, made to the house in 1925. The western portion is in symmetry with the eastern side. The brick wall is assumed to be an addition prompted by the 1932 plan. It is noted on the plan as nine inches high. This concurs with field measurements today. It is possible that the wall was the foundation for the earlier wood fence, but there was no indication of former attachments between the wood supports and the foundation wall. The length of the wall and the central pillars, placed at each side of the central walk, are indicated in the plan. The McLeod copy of the plan includes what is assumed to be field notations by Briggs. One notation is clearly the addition of a millstone in the central walkway at the wall intersection. The millstone exists in this location today.

This Briggs' plan continued the symmetry of the original garden. In the plan and an element that was executed was the extension of the central walk past the

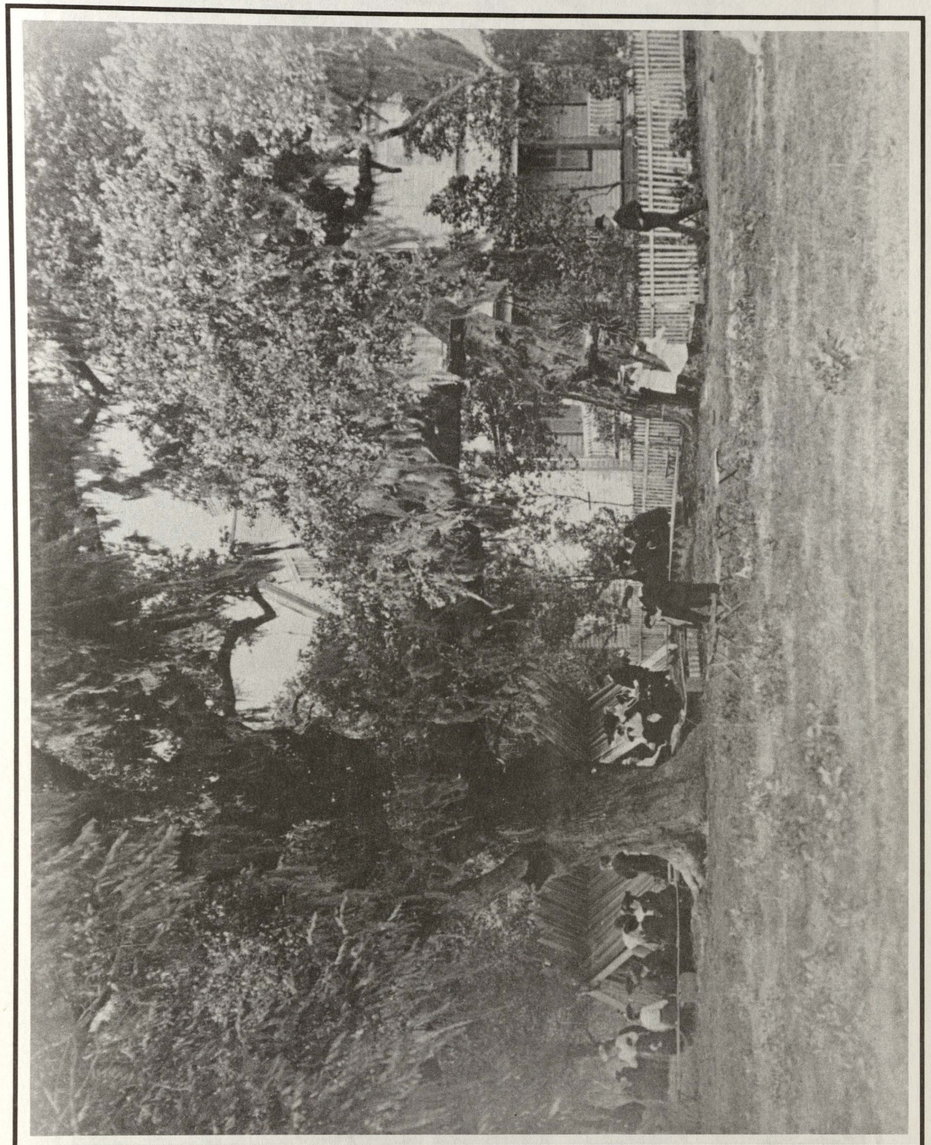


*Figure 3.H:* Picnic on grounds of McLeod Plantation, 1903 (Courtesy, Charleston Museum)



*Figure 3.1:* Mr. William Wallace McLeod standing in McLeod formal garden, born 1850, photo date belived to be c. 1890-1900 (Courtesy, Mr. Creighton Frampton)

brick wall. The walk south of the brick wall duplicates the basket weave pattern of the original walk, but does not contain the sawtooth edge of the original walk. The plan in this area recommended a circular area of flagstone paving at the base of the magnolia tree, an element that was not implemented. At the base of the magnolia today, there is an iron bench. The bench is placed on axis with the walkway, but the bench was not specified in the Briggs' plan. In the plan, the magnolia was encircled on three sides by walks, a hedge and roadway. The trace of the road in the landscape today appears to be the only element that was constructed.

According to Mr. Frampton, the narcissus bulbs that bloom in the formal garden at McLeod were planted by his great grandmother, Susan Lawton McLeod, before the Civil War. The narcissus, which bloomed in February 1991, outlined the geometric shapes in the original as well as the expanded garden. Based on the garden evolution theory, the bulbs would have been moved to respond to this final garden form.

*Formal Garden Plant Materials* - Information on the plant materials has been obtained through a site inspection and interviews with Mr. Frampton and Miss Eloise Pope, the current occupant of the residence who took care of Mr. McLeod his last 14 years. Miss Pope appeared to be recounting information that Mr. McLeod had shared with her in his final years. Surviving plant materials noted on the 1932 Briggs Plan are noted in *Figure 3.J.*

A focal point of the formal garden is the magnolia tree, situated on axis with the central walkway. The age of this magnolia and its critical location in the garden design also supports a late-19th century garden beginning date. According to Miss Pope, Mr. W. E. McLeod remembered the planting of the magnolia. He was three or four years old when his father gathered the plant from the surrounding woods and brought it to this location in the garden.

Plant materials in the formal garden include three camellias in the circular beds with the one remaining circular planting bed containing a banana-shrub (Michelia fuscata). There are five nandinas (Nandina domestica) found within the formal garden, two at each side of the steps leading to the door of the residence; and three in various locations within the beds that border the outside of the circular beds.

There are two grapefruit plants, one to each side of the nandinas at the steps. Miss Pope related an interesting story about the grapefruit bush. Supposedly, there was a single plant in front of the structure at McLeod. It was so large that it almost covered the entire planting bed adjacent to the house. The plant had a bumper crop in two consecutive years. According to Miss Pope and confirmed by Mr. Frampton, the plant produced 45 grapefruits one year and the following year the plant bore 72 grapefruits two weeks before Christmas. The plant was killed in a hard freeze on Christmas eve, estimated by Miss Pope to have been eight years ago. A year or so later, Mr. McLeod was "down with his back" and on doctor's order could not leave his bed. It was in the fall when Reverend Edward Guerry, the former Episcopalian minister at Saint James Episcopal Church,

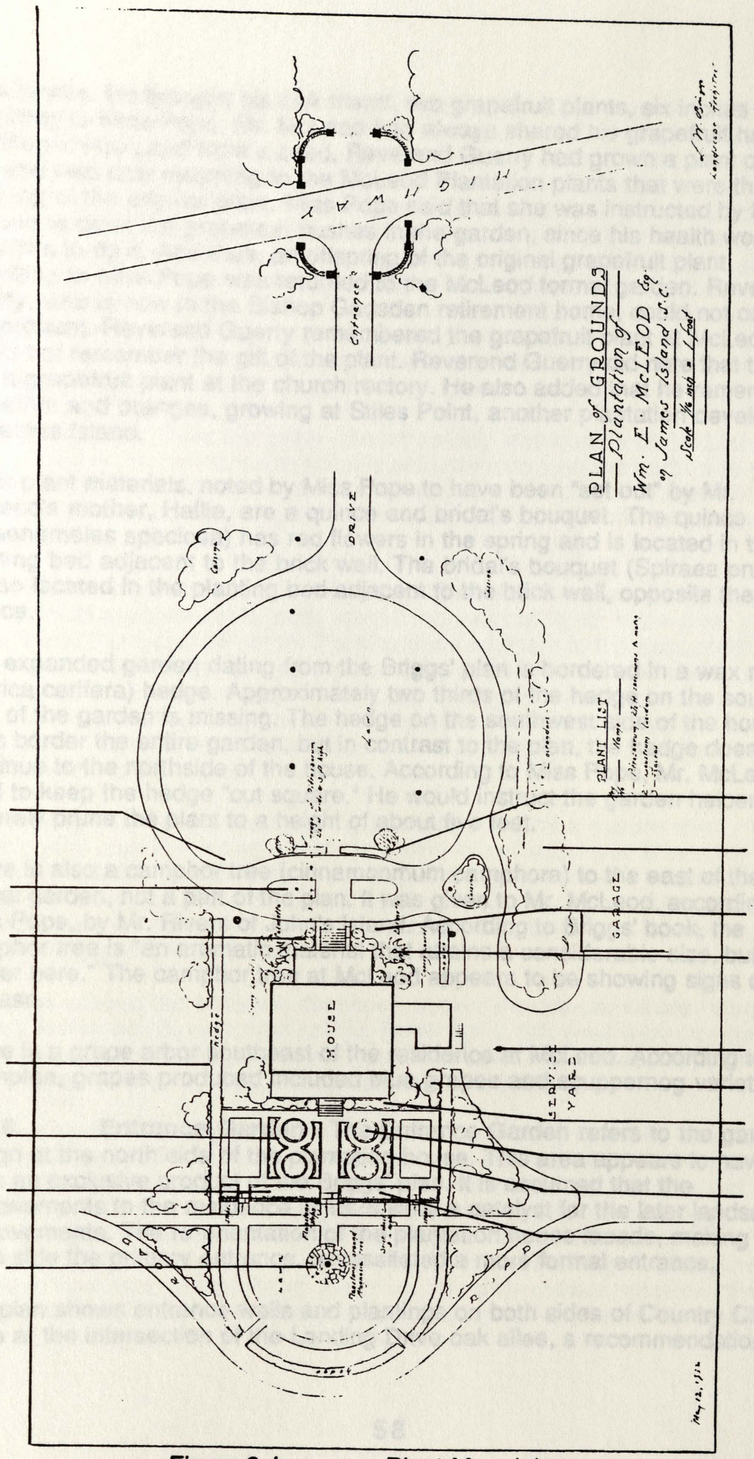
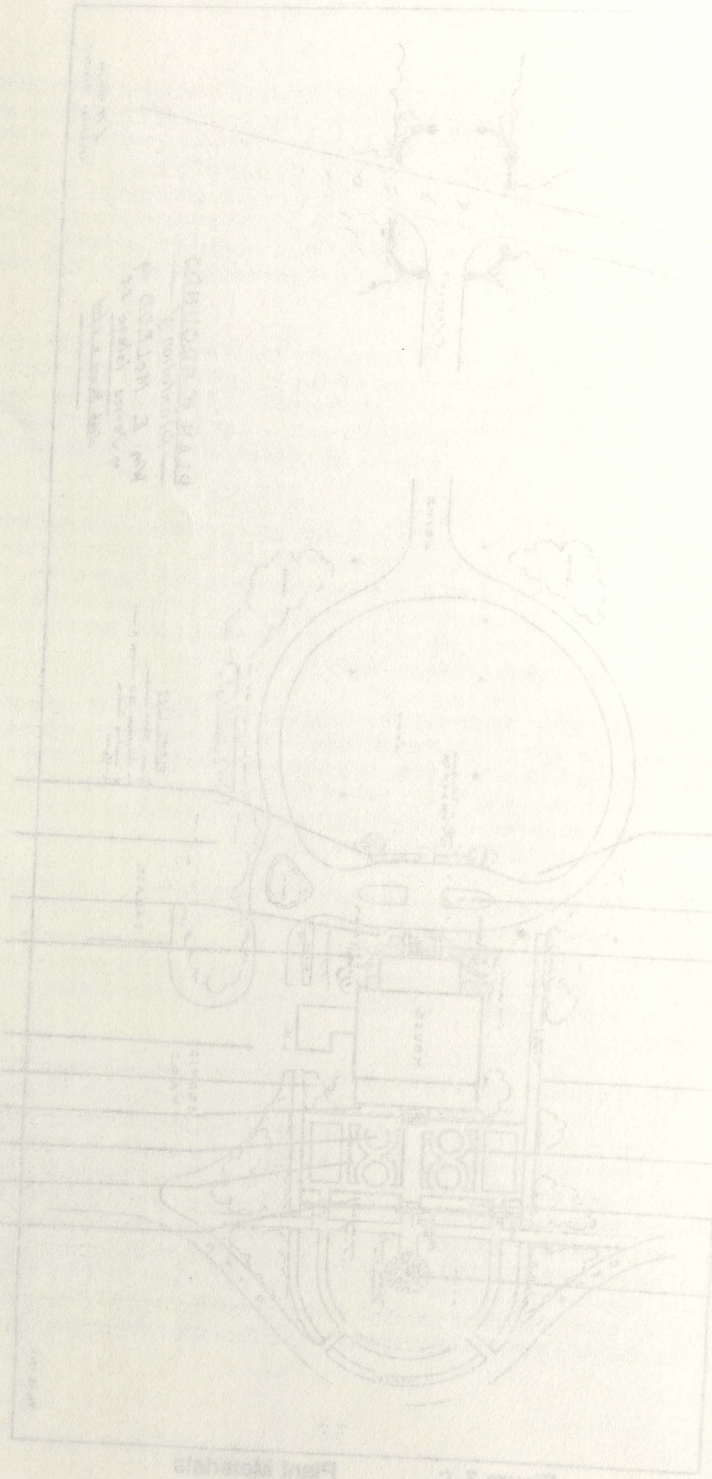



*Figure 3.J:* Plant Materials



came to visit. He brought his sick friend, two grapefruit plants, six inches high. According to Miss Pope, Mr. McLeod had always shared his grapefruit harvest with the minister, and from a seed, Reverend Guerry had grown a plant of his own and was now returning to the McLeod Plantation plants that were the offspring of the original plant. Miss Pope said that she was instructed by Mr. McLeod to plant the grapefruit bushes in the garden, since his health would not allow him to do it. And thus, an offspring of the original grapefruit plant, according to Miss Pope was returned to the McLeod formal garden. Reverend Guerry, who is now in the Bishop Gadsden retirement home, could not confirm this account. Reverend Guerry remembered the grapefruit plant at McLeod, but he did not remember the gift of the plant. Reverend Guerry did note that there was a grapefruit plant at the church rectory. He also added that he remembers grapefruit and oranges, growing at Stiles Point, another plantation development on James Island.

Other plant materials, noted by Miss Pope to have been "set out" by Mr. McLeod's mother, Hallie, are a quince and bridal's bouquet. The quince (Chaenomeles speciosa) has red flowers in the spring and is located in the planting bed adjacent to the brick wall. The bridal's bouquet (Spiraea prunifolia) is also located in the planting bed adjacent to the brick wall, opposite the quince.

The expanded garden dating from the Briggs' plan is bordered in a wax myrtle (myrica cerifera) hedge. Approximately two thirds of the hedge on the southeast side of the garden is missing. The hedge on the southwest side of the house does border the entire garden, but in contrast to the plan, the hedge does not continue to the northside of the house. According to Miss Pope, Mr. McLeod liked to keep the hedge "cut square." He would instruct the garden helpers to severely prune the plant to a height of about five feet.

There is also a camphor tree (cinnamonmum camphora) to the east of the formal garden, not a part of the plan. It was given to Mr. McLeod, according to Miss Pope, by Mr. Rivers of John's Island. According to Briggs' book, the camphor tree is "an aromatic material that attains a considerable size, but is tender here." The camphor tree at McLeod appears to be showing signs of disease.

There is a grape arbor southeast of the residence at McLeod. According to Mr. Frampton, grapes produced included blue grapes and scuppernog varieties.

**3.9.6 Entrance Garden** - The Entrance Garden refers to the garden design at the north side of the plantation house. This area appears to have been an exclusive product of the Briggs' plan. It is assumed that the improvements to the residence in 1925 were a catalyst for the later landscape improvements. The re-orientation of the plantation house facade, making the north side the primary entrance, necessitated a more formal entrance.

The plan shows entrance walls and plantings on both sides of Country Club Drive at the intersection of the Landing Drive oak allee, a recommendation that

was apparently not acted upon. A major improvement that was followed included the reconfiguration of the oak allee into a circular drive near the house with a parking area. The drive adjacent to the house is lined with brick, set on a vertical edge. Two small parking islands, immediately to the front of the structure,were probably designed to separate parked cars and allow an unobstructed lane. The islands are also outlined in brick with a millstone surrounded by slate paving situated between the islands. The slate paving relates to slate paving at both edges of the drive. The millstone and the recommendation for slate are features that relate this side of the landscape design to the south yard of the structure. Another structural feature, not shown in the plan, are two concrete bollards. There is a bollard located in the corners near the house at the inside edge of the circular drive.

*Entrance Garden Plant Materials* - An interesting observation of the Loutrell Briggs' plan is the reference to specific plant materials on the north side of the house and the lack of any plant material recommendations on the south side of the house. This fact again supports the theory that much of the formal garden was existing at this time.

In the entrance garden much of the Briggs' plan was followed. Deviations from the plan that are detectable today were minor. As called for in the plan, palmetto trees frame the entrance porch. Planting beds adjacent to the front porch were shown in the plan to contain pittosporum, ligustrum, azalea, and cherry laurel. The ligustrum and cherry laurel exist today, though not in the precise location noted in the plan. This may reflect the migration of the historic plant materials. Holly seems to have been substituted for the pittosporum and yew podocarpus planted instead of azaleas.

The parking islands are filled with ivy and one contains a mature cherry laurel. A dot on the plan in the location of the cherry laurel leads one to assume that the laurel today is well over 60 years old. The plan specified a pittosporum hedge on the inside of the circular drive. An effective design feature that shielded the cars from view. Instead of pittosporum, the hedge was created with ligustrum (Ligustrum japonica).

Plantings around the bollards, described above, include periwinkle (Vinca minor), boxwood (Buxus), and azalea. Plantings in this area were not specified on the plan, but were illustrated with plant symbols. The McLeod copy of the plan with field notes by Briggs did note azalea in this area.

It also appears from Briggs' notes that under the allee of oaks, he intended for there to be periwinkle (Vinca major) adjacent to the road with yellow jassamine, (noted in parentheses with jas. primailisium) extending into the adjacent woods. Between the kitchen and dairy, again surmised from field notes, Briggs recommended clusters of oleanders framing an informal scattering of dogwoods. From field notes, there were to be clusters of dogwood and sweet myrtle at several locations along the drive. The plan without notations shows the clusters to be of cassina, probably Ilex cassine, a native plant of the coastal

plain. Instead of sweet myrtle, dogwood, or cassina, there was a hedge of sweet bay magnolia planted on the east side of the circular drive.

**3.9.7 Vegetative Cover -** The wooded areas of the McLeod site are primarily hardwood vegetation. The wooded zones experienced significant damage during Hugo. These wooded zones, which border the edges of the site, previously created a visual buffer between the site and portions of Folly Road and the Country Club development. Damage from Hugo has made the site more open.

# 4.0 Preservation Boundary

**Jaeger**
**Pyburn**

Planning
Architecture
Historic Preservation
Landscape Architecture

# 4.0 Preservation Boundary

Map 8: Preservation Boundary illustrates three zones within the site. These include: (1) Primary Preservation Zone; (2) Secondary Preservation Zone; and (3) Tertiary Preservation Zone.

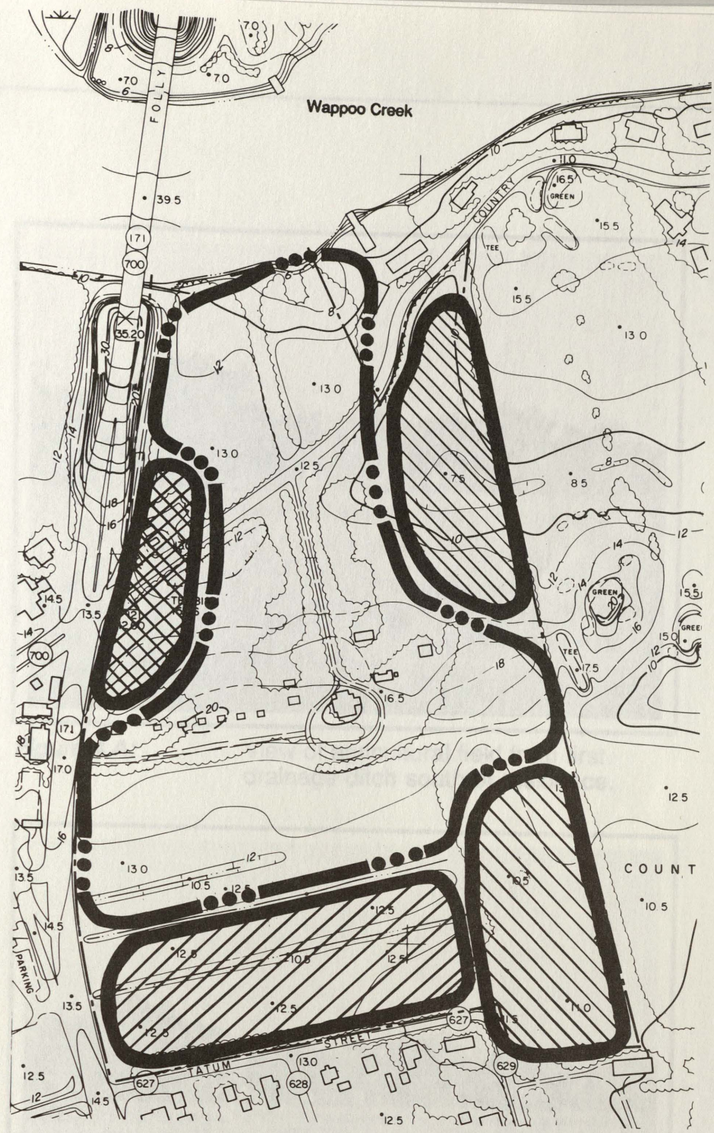
It is recommended that no development occur in the Primary Preservation Zone. This zone reflects archeological findings and visual considerations related to the architectural and landscape architectural characteristics of the site. A review of Map 5: Archeological Resources reveals that the primary preservation zone protects the significant ridge area, the Deptford site, the cemetery area (the extent currently known), and most of the nineteenth-century archeological concentrations. All of the site's architectural resources are located within the primary preservation boundary and the obvious landscape architectural features.

The primary preservation zone also recognizes the importance of the agricultural setting. Approximately one-half of the agricultural field to the south of the plantation residence is contained in the primary preservation boundary. A series of photographs were taken at the site along Folly Road at the first, second, and third drainage ditches, and at the southwest corner of the field *(Figures 4.A - 4.E)*.

The drainage ditches were selected as a potential boundary division for several reasons.The drainage ditches are not only an important element in the agricultural history of the site, but are also a critical component in the site's hydrology. A boundary created at a drainage line preserves as much of this historical element as possible and lessens the impact on the site's hydrology.

The second drainage ditch, pictured in Figure 4.B, was selected as the boundary for the primary preservation zone. Visually, this line provided a sufficient area of agricultural land to complement the building collection. Cultivation of the field would in all likelihood be desirable in the potential historic interpretation of the site, but the area to be cultivated should be a manageable size. Lessening the current size of the agricultural field without harm to the agricultural context also lessened future management responsibilities, while at the same time preserved the agricultural setting.

The agricultural field outside the primary preservation zone is contained within the Secondary Preservation Zone. In the secondary preservation zone development is possible with restrictions. The openess of this site necessitates special design considerations. New development on this site should complement the historic qualities of the McLeod site. It is particularly important that the portion of this site immediately adjoining the primary preservation zone




Legend

- Primary Preservation Zone
- Secondary Preservation Zone
- Tertiary Preservation Zone

# Proposed Preservation Boundaries

**MAP 8**

0 25 50 75 100 150 200 300
Scale in Feet

North

*McLeod Plantation*
*James Island, South Carolina*

*Historic Charleston Foundation*
*Charleston, South Carolina*

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NEW SOUTH ASSOCIATES
Archeology

ROBERT CHARLES LESSER
Real Estate Analysis



*Figure 4.A:* View of agricultural field from first drainage ditch south of residence.



*Figure 4.B:* View of agricultural field from second drainage ditch south of residence.



*Figure 4.C:* View of agricultural field from third drainage ditch south of residence.



*Figure 4.D:* View of agricultural field from southwest corner of field.



*Figure 4.E:* View of plantation house from second drainage ditch south of residence.

present a compatible edge to the remainder of the site. In the historic interpretation of the primary preservation zone, this site will be the major view from the south side of the plantation house and slave cottages.

There are archeological artifacts located within this area, but documentation and/or recovery was not deemed necessary by the project Archeologist. Occupation was for only a short time and, thus, anticipated archeological findings would be minimal. In addition, the remaining portion of the agricultural field is contained within the primary preservation zone and thus provides an opportunity to evaluate this type of archeological resource.

In the Tertiary Preservation Zone development would be allowed with less restrictions. Areas noted in the tertiary zone include approximately five acres to the east of the secondary preservation zone and another approximate five acre tract immediately south of Country Club Drive along the eastern edge of the site. Both of these tracts are wooded and were not identified as containing archeological resources. The design considerations noted above would also be applicable, though not as critical due to the wooded character of these sites.

Another area noted on the map falls somewhere between the secondary and tertiary zones. This area includes approximately four acres to the south and north of Country Club Drive at the western boundary of the site. This area currently contains the Fire Station site with the balance wooded. This site is an important gateway to the site, and thus its development will play an important role in initial impressions at McLeod. In addition, the exact configuration of the cemetery also impacts this zone. Archeological work, such as ground penetrating radar suggested in the Section 3.7, will need to precede an exact delineation of this zone.

# 5.0 Market Analysis

**Jaeger**
**Pyburn**

Planning
Architecture
Historic Preservation
Landscape Architecture

# 5.0 Market Analysis

To develop the market analysis section of this report, a visit was made to the subject site; demographic data was compiled and analyzed for the Charleston market area and the site's competitive market area; for-sale and for-rent residential alternatives in the marketplace were identified and surveyed; potential planned commercial and residential developments in close proximity to the subject site were identified and surveyed; and demand forecasts prepared to assess the market potential for residential development at the subject property. Findings are discussed in detail below with tables and exhibits included at the end of this section.

## 5.1 Subject Site Description

The McLeod Plantation property is located on James Island in Charleston, South Carolina at the intersection of Folly Road and Country Club Drive and Tatum Street. The property includes an original plantation home, slave cabins, and outbuildings with archaeological evidence dating back to the seventeenth century. The site is intersected by Country Club Drive to the north, dividing the site into a 6.8 acre parcel north of Country Club Drive, and 42.4 acres to the south. The smaller parcel slopes considerably and has frontage along Wappoo Creek, the intercostal waterway. Currently, the City of Charleston is operating a temporary fire station on a portion of this parcel at the corner of Country Club Drive and Folly Road. The larger parcel features the existing structures as well as an oak alley and agricultural field extending to Tatum Street to the south of the site. The site is plainly visible from Folly Road.

Land uses surrounding the site include residential and commercial development, the latter of which is concentrated west of the site on Folly Road. The Country Club of Charleston golf course abuts the eastern property line of the site. The country club development includes established single family homes, with recent resales selling in the $200,000+ range for golf front and/or golf view locations. Single family development along Tatum Street to the south of the site includes more moderately priced smaller lots and homes outside of the country club development.

The intersection at which the site is located is a heavily travelled access point to downtown Charleston (via the Ashley River Bridge) and area beaches (south and west of the site via Folly Road and Maybank Highway). The future completion of the James Island Bridge (est. late 1992) connecting Calhoun Street downtown and Harborview Road on James Island will provide an additional access point to the island. While the completion of the bridge will relieve some of the congestion currently experienced near the subject site, it is

likely that the corner at which the site is located will continue to be an active thoroughfare.

## 5.2 Demographic Overview

The analysis of the potential for residential development at the subject property includes a review of demographic trends within the site's sphere of influence. The Primary Market Area (PMA) from which most of the demand for the site will emanate has been defined as the Charleston MSA including Charleston, Dorchester, and Berkeley Counties. The Competitive Market Area (CMA), the area in which the project will compete for residential home sales on a more or less equal basis, has been defined as an area including James Island and portions of West Ashley. Exhibit 1 describes the location of the subject site in relation to the PMA and CMA. Detailed tables regarding demographic trends are provided on Exhibits 2 through 6 of the appendix and are summarized below.

Overall trends indicate that the Charleston MSA is a moderately sized market with stable growth. The Charleston MSA has a current population of approximately 497,902 with 174,766 households. Between 1990 and 1995 the MSA will add 3,700 new households each year, representing an annual growth rate of approximately 2.0%. In our CMA, the current population is about 72,350 with 28,200 households. Based on these estimates, the CMA represents approximately 15% of the population and households within the MSA. The CMA represents approximately one-quarter of the population within Charleston County.

Between 1990 and 1995, the CMA is projected to remain stable, adding an average of 200 new households each year. About half of those households are projected to locate on James Island, bringing households to a total of nearly 11,000 on the island by 1995. As shown on Exhibit 2, the James Island population has remained fairly stable since 1980, averaging new household growth between 100 and 200 households annually. With the completion of the James Island Bridge in late 1992, it is likely that additional household and population growth will be sustained on the island, as access points are added and additional development activity is attracted.

Population by age distributions for the Charleston MSA, County, and the CMA are tabled on Exhibit 3. Figures for the CMA indicate a family oriented market, with over 36% of the population between the ages of 25 and 44. Households within this age group represent a broad spectrum of renters, first-time and move-up homebuyers. Similar to national demographic trends, it is the 45 to 54 year old age group which will experience the greatest growth over the next five year period. Households within this age group are characterized by both mature families who are in the market for prestigious, luxury-oriented homes as well as empty nesters who are typically interested in "moving down" within the market to a small-lot or lower maintenance home. Household income and affordability levels on Exhibit 5 demonstrate that the CMA enjoys a greater percentage of

middle and higher income households compared to the county or MSA which is a positive indication for housing demand.

Employment growth statistics and projections for the Charleston MSA and Charleston County (Exhibits 4 and 4.1) by the National Planning Association indicate positive growth, with the MSA projected to add 7,500 new jobs annually over the next 5 years. Charleston County employment, which represents 80% of the current jobs in the MSA, will capture 63% of that growth, or 4,700 new jobs annually. A comparison of both historical and projected population and employment growth data indicates that the NPA employment growth figures may be overstated, however, it is likely that the MSA will continue to sustain positive growth into the 1990's.

Currently, approximately one-third of employment within the MSA is concentrated within the government sector, which includes military installation locations in Charleston. The data indicates that over 60% of the new jobs will be concentrated in the services and the retail trade industry. The growth of these sectors combined with the stability of the government sector indicate a positive outlook for the Charleston MSA.

Building permit statistics for the MSA, Charleston County, and James Island from 1984 through 1990 are shown on Exhibit 6. Permits have averaged approximately 5,000 total units yearly in the MSA over the past five years, with approximately 60% issued for single family development and 40% for multifamily development. There has been a demonstrated decrease in multifamily permit activity in all market areas since the mid-1980's. The number of permits issued on James Island has ranged from 113 in 1989 to a high of 566 in 1986, when 352 multifamily permits were issued for the Quarterdeck Apartments. Typically, the majority of permit activity on the island has been for the development of single family homes.

## 5.3 Competitive Market Area Overview

In order to determine the potential for residential development at the site, competitive single family, for-sale multifamily, and rental projects were selected and surveyed. Our surveys are tabled on Exhibits 7 through 10 of the appendix.

**5.3.1 For-Sale Projects -** Seventeen for-sale projects were surveyed, including two multifamily projects, representing a total of 1,227 units, 862 of which have been offered for sale (70%), and 413 of which have been sold among those offered (48%). Our surveys are tabled on Exhibit 8 (2 pages) with the locations of each shown on Exhibits 7 and 7.1.

Surveyed single family homes range in price from $72,900 to over $300,000 with most offering homes in the low to mid-$100,000's. Home sizes range from 1,120 to over 3,000 square feet producing value ratios from $55 to over $100 per square foot. The projects are summarized by price range on the exhibit with the lowest priced projects at the top of the page.

In general, sales among active projects have been moderate to slow, with sales over the past six months slowing relative to past months. The slower sales rates are not surprizing given the current recessionary economy and hesitation among buyers to make a major purchase. Our surveys indicate, however, that the lowest priced projects are selling the best within the market, averaging over 2 home sales per month. These projects typically offer a home priced under $100,000 on small lots, usually under 10,000 square feet. As price levels increase, absorption rates fall, with the move-up and luxury priced homes selling less than one home per month. These homes are priced from the mid $100,000's to over $300,000 on one-third to one-half acre lots. Mid-priced homes ($100,000 to $150,000's) average sales of 1.5 homes per month. Lot sizes for these projects range between 8,000 and 15,000 square feet (less than one-quarter to one-third of an acre).

Projects or lots which feature water, marsh, or golf frontage command premium prices within the market. Lots featuring water frontage and access are priced up to three times the base lot price, while marsh and/or water views can command 60% to two times the base lot price. Depending upon the location and quality of the club, golf course premiums can add from 25% to over 75% on to the base lot price according to our surveys. The only project identified within the CMA featuring a golf front or view amenity is Shadowmoss Plantation. A large planned community with a semi-private course, Shadowmoss has several small subdivisions actively selling lots with golf frontage or views. Homes range in price from $85,000 to over $300,000 depending upon the location and lot size.

Buyers include mostly families, as well as some young couples and empty nesters. Young couples and small families make up the majority of buyers among the lower priced projects, while mature families and empty nesters are purchasing higher priced properties.

Two for-sale multifamily properties were identified in the market including Stono Watch at Headquarters Island and Riverside at Wappoo Creek near the subject property. Neither property has performed as well as single family properties, with average sales rates of approximately .5 unit sales per month. This has been typical of our experience in reviewing other non-beach oriented multifamily for-sale properties in and around Charleston. Units at Riverside are priced from $115,000 to $168,000 and feature views of Wappoo Creek and dock access. The Stono Watch townhomes are priced from $126,900 to $134,900 for the 1,625 square foot units. Most buyers who have purchased within these projects are either young couples or empty nesters. No family buyers have purchased a unit to date.

**5.3.2 Rental Projects -** Our surveys of area rental properties are tabled on Exhibit 8 with the locations of each mapped on Exhibit 7. Our surveys include profiles of 5 rental projects representing a total of 754 units, 747 or 99% of which are currently leased. Only one of the five properties currently has a vacancy, River Point Apartments. The newest project, the Quarterdeck, was built five years ago. It is the largest project on James Island and captures the highest

rents and per square foot values. Generally, rents range from the mid-$300's to $600 for the one to three bedroom units identified in the market. Per square foot rents range from $.35 to $.68. At the Quarterdeck, rents range from $405 to $615, with value ratios in the $.62 to $.68 range.

Renters include a mix of singles, students, couples, families, and retirees. Given the high occupancies and the tight market on James Island, no projects are offering rental concessions or rental discounts. Based on our research to date, the rental market appears to be one of the strongest opportunities for new development on James Island.

**5.3.3 Commercial Overview -** In order gain a better understanding of the site's market area, we selected nearby retail and office projects for review in addition to our surveys of the residential market. Our surveys are tabled on Exhibit 12 with the locations shown on Exhibit 11.

Occupancies are strong at area retail shopping centers, averaging 95% among the three properties surveyed. Of the 236,614 existing square feet, 12,870 square feet is available for lease. Each property is anchored by a grocery store, with three of the major grocery store chains active in Charleston represented including Winn-Dixie, Harris Teeter, and Piggly Wiggly. Subanchors typically include a major drug store chain such as Eckerd or Rite-Aid. The presence of each of these major chains within close proximity to the site indicates the market is presently well served.

There is currently a 17% vacancy at the Wappoo Center office building located across Folly Road from the subject site. The building serves small professional office users such as attorneys, accountants, engineers, and insurance agents. Space within the building is available for rent or for sale.

**5.3.4 Planned and Proposed Projects -** In order to identify future development sites and opportunities within the CMA, we spoke with city and county planners and local brokers and developers regarding proposed properties. Seven properties were identified within proximity to the subject site as shown on Exhibits 13 and 14. The properties include a mix of potential residential and commercial sites. The development of each property will depend heavily on the ability of purchasers and developers to obtain financing. Within the recessionary economy, financing has become increasingly difficult to secure in Charleston as well as throughout the southeast.

Across from the site on Wappoo Creek Drive, office sites are presently being marketed for sale. The graded sites which can accommodate from 3,000 to 6,000 square feet of space are priced from $105,000 to $145,000. Nearby the subject site, along Albemarle Drive, two mixed use sites are presently planned and/or available for sale. The sites are located on the Ashley River with views of downtown. One 20-acre parcel is being marketed at $500,000 per acre. The Marina Village site (25 acres) was purchased at $550,000 per acre and is planned to include a mix of office/retail and residential properties. No financing has been obtained for development of the property.

The largest potential development identified is the "Dill" property located at Folly Beach and Grimball Roads. The site is under contract for sale to two separate developers, one 23-acre parcel for commercial development, and the remaining 390 acres for a residential planned community. The commercial parcel is under contract for $90,000 per acre, and is planned for a retail center with K-Mart as the anchor. The residential portion of the property is under contract for $4.4 million or $11,282 per acre. The residential site is zoned for up to 1,300 units, although it is likely that fewer units will be developed. No specific timing has been set for either development.

## 5.4 Demand Analysis

In order to estimate potential future demand and potential absorptions for residential development at the McLeod Plantation site, a demand analysis was performed for both for-sale single family and multifamily units and rental units. Our demands are based on a combination of statistical data from our demographic review and competitive surveys as well as qualitative judgments based on our interviews in the market.

Potential absorptions are estimated based on two sources of demand, including new household growth and turnover of existing households (owners and/or renters). Each source of demand is qualified by income and the propensity to rent or own each of the proposed product types. Reasonable capture rates of the total demand for each product are estimated for Charleston County, the CMA and the subject site based on each area's share of future growth and competitive alternatives by price range. The demands are shown on Exhibits 15 through 17 of the appendix, and discussed below.

The demand for for-sale single family detached homes was estimated for price segments ranging from $60,000 to $300,000 as shown on Exhibit 15. The analysis includes demand from new household growth within the MSA as well as turnover of existing owner and renter households. Based on this analysis, approximately 3,600 households within the Charleston MSA will be in the market for a new single family home annually for the next five years. Of this total, approximately 2,000 are expected to be located within Charleston County, and 372 will be within James Island and the CMA. Based on this level of demand within the CMA, the subject site is anticipated to capture between 20% and 25% of the demand among competitive alternatives by price range. As a result the project could achieve absorptions ranging from .4 to 2.4 sales per month. The analysis indicates that the lowest priced homes would achieve the highest absorptions, while homes priced above $150,000 will average between .4 and 1 home sale per month.

The demand analysis for attached product (condominiums and townhomes, Exhibit 16) was also estimated for market segments ranging from $60,000 to $300,000. This analysis indicates less potential for development of for-sale attached housing with the overall demand in the CMA estimated at 150 sales per year. Of this potential demand, the subject site is projected to capture a fair

share of 30%, resulting in potential monthly absorptions of .1 to 1.5 sales per month depending upon the price range. Similar to detached products, the lowest priced products are estimated to capture the highest sales rates.

Our analysis of the demand for rental units (Exhibit 17) assumes that the units at the site would be priced competitively with the market ($350 to $750). The analysis takes into account demand from new household growth and existing renter households in turnover. Based on these rents, the site could lease approximately 11 units per month, or 132 units per year, the size of a small rental project.

## 5.5 Summary of Findings

Our findings for this stage of the assignment are summarized on Exhibit 18 and discussed below. Based on our initial analysis and review of the subject property and competitive market area, it is apparent that there are alternatives to consider for the subject property. With the understanding that the goal is to maximize both the value of the site and its preservation, we have identified some potential opportunities.

Our surveys of the CMA and the strong occupancies identified within rental properties indicate that development of rental apartments represents a potential opportunity for the property. In terms of orientation on the site, rental development would require access and visibility from Folly Road, suggesting the possibility of creating a parcel on the southern portion of the property.

The proximity of the Country Club of Charleston and potential golf course frontage suggest potential for single family development along this portion of the site, as was suggested within the earlier appraisal. Given the quality of the country club and course, it is likely that these homes be oriented to the move-up and luxury market. While the opportunity for attached multifamily for-sale product appears limited, the alternative may exist to offer low maintenance small sized lots which will increase the potential value of the site.

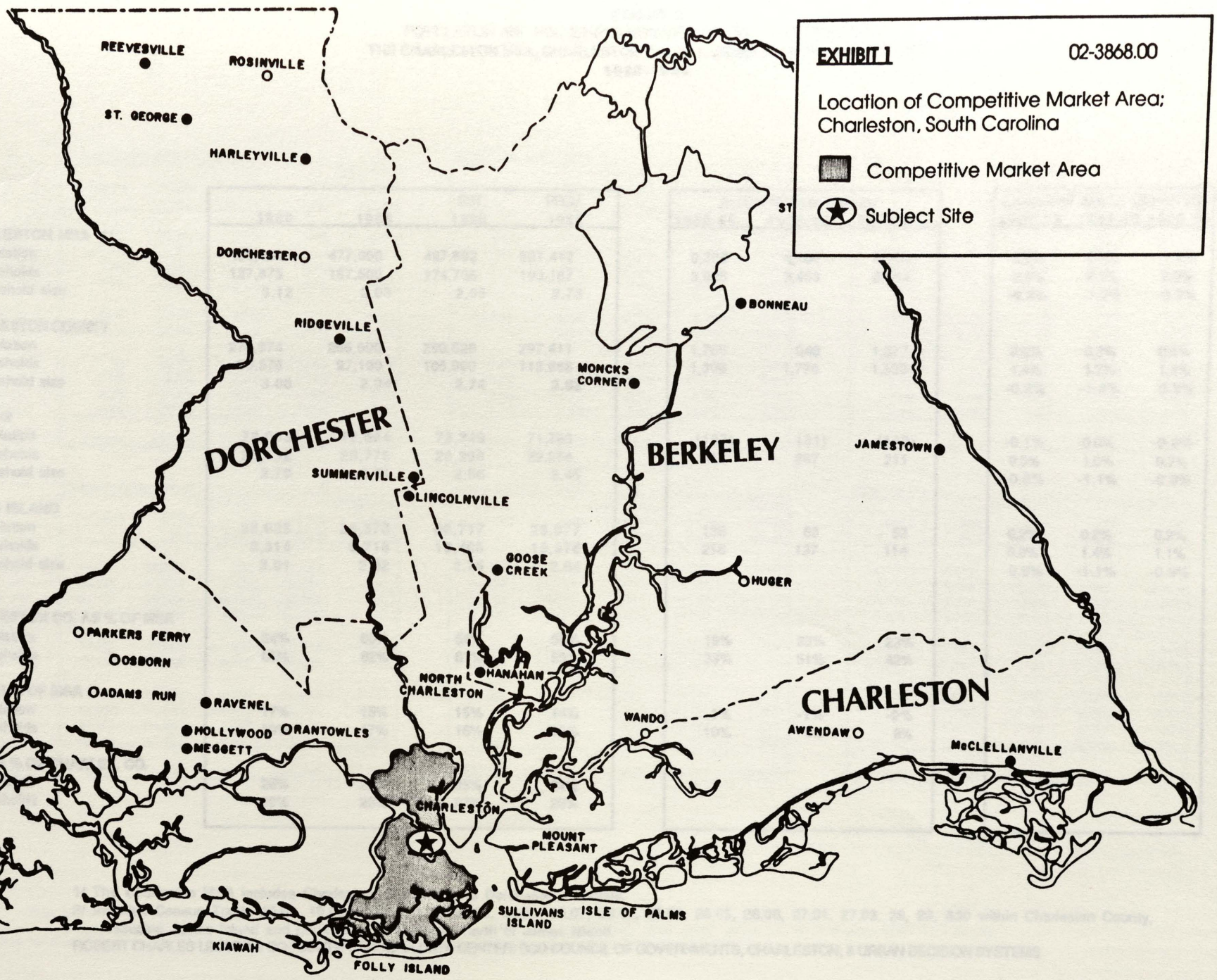


**EXHIBIT 1** 02-3868.00

Location of Competitive Market Area;
Charleston, South Carolina

Competitive Market Area

Subject Site



pophh

02-3868
HCF
Apr-91

**EXHIBIT 2**
**POPULATION AND HOUSEHOLD GROWTH TRENDS AND PROJECTIONS**
**THE CHARLESTON MSA, CHARLESTON COUNTY, JAMES ISLAND, AND THE CMA**
**1980-1995**

| | | | EST. | PROJ. | Annual Number Change | | | Compound Annual Growth (%) | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1980 | 1985 | 1990 | 1995 | 1980-85 | 1985-90 | 1990-95 | 1980-85 | 1985-90 | 1990-95 |
| **CHARLESTON MSA 1/** | | | | | | | | | | |
| Population | 430,462 | 477,000 | 497,902 | 527,412 | 9,308 | 4,180 | 5,902 | 2.0% | 0.9% | 1.1% |
| Households | 137,875 | 157,500 | 174,766 | 193,187 | 3,925 | 3,453 | 3,684 | 2.6% | 2.1% | 2.0% |
| Household size | 3.12 | 3.03 | 2.85 | 2.73 | | | | -0.6% | -1.2% | -0.9% |
| **CHARLESTON COUNTY** | | | | | | | | | | |
| Population | 276,974 | 285,800 | 290,528 | 297,411 | 1,765 | 946 | 1,377 | 0.6% | 0.3% | 0.5% |
| Households | 90,570 | 97,100 | 105,990 | 113,686 | 1,306 | 1,778 | 1,539 | 1.4% | 1.7% | 1.4% |
| Household size | 3.06 | 2.94 | 2.74 | 2.62 | | | | -0.8% | -1.4% | -0.9% |
| **CMA /2** | | | | | | | | | | |
| Population | 73,033 | 72,504 | 72,349 | 71,783 | (137) | (31) | (113) | -0.1% | 0.0% | -0.2% |
| Households | 26,152 | 26,775 | 28,208 | 29,264 | 411 | 287 | 211 | 0.5% | 1.0% | 0.7% |
| Household size | 2.79 | 2.71 | 2.56 | 2.45 | | | | -0.6% | -1.1% | -0.9% |
| **JAMES ISLAND** | | | | | | | | | | |
| Population | 28,035 | 28,376 | 28,717 | 28,977 | 136 | 68 | 52 | 0.2% | 0.2% | 0.2% |
| Households | 9,314 | 9,718 | 10,405 | 10,976 | 218 | 137 | 114 | 0.8% | 1.4% | 1.1% |
| Household size | 3.01 | 2.92 | 2.76 | 2.64 | | | | -0.6% | -1.1% | -0.9% |
| **CHARLESTON CO. AS % OF MSA** | | | | | | | | | | |
| Population | 64% | 60% | 58% | 56% | 19% | 23% | 23% | | | |
| Households | 66% | 62% | 61% | 59% | 33% | 51% | 42% | | | |
| **CMA AS % OF MSA** | | | | | | | | | | |
| Population | 17% | 15% | 15% | 14% | -1% | -1% | -2% | | | |
| Households | 19% | 17% | 16% | 15% | 10% | 8% | 6% | | | |
| **CMA AS % OF CHARLES. CO.** | | | | | | | | | | |
| Population | 26% | 25% | 25% | 24% | | | | | | |
| Households | 29% | 28% | 27% | 26% | | | | | | |

1/ The Charleston MSA includes Charleston, Berkeley, and Dorchester Counties.
2/ Includes Census Tracts 19.01, 19.02, 20.02, 20.03, 20.05, 20.06, 20.07, 26.02, 26.04, 26.05, 26.06, 27.01, 27.02, 28, 29, &30 within Charleston County, including James Island and portions of West Ashley north of James Island.
ROBERT CHARLES LESSER & CO.; SOUTH CAROLINA DATA CENTER; BCD COUNCIL OF GOVERNMENTS, CHARLESTON; & URBAN DECISION SYSTEMS

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**EXHIBIT 3**
**AGE DISTRIBUTION OF POPULATION FOR**
**THE CHARLESTON MSA, DORCHESTER & CHARLESTON COUNTIES, AND THE CMA**
**1980-1995**

**CHARLESTON MSA /1**

| | 1980 | 1990 EST | COMP ANN. % CHG 80-90 | 1995 PROJ. | COMP ANN. % CHG 90-95 |
|---|---|---|---|---|---|
| Under 5 | 9.7% | 10.0% | 1.9% | 9.4% | 0.6% |
| 6 to 13 | 13.2% | 11.9% | -0.1% | 12.1% | 0.8% |
| 14 to 17 | 7.7% | 5.8% | -27.6% | 5.4% | -0.2% |
| 18 to 20 | 7.2% | 4.9% | -2.1% | 4.4% | -0.2% |
| 21 to 24 | 9.8% | 7.7% | -0.2% | 6.9% | 0.3% |
| 25 to 34 | 18.1% | 19.2% | 2.5% | 17.3% | -1.0% |
| 35 to 44 | 11.2% | 15.0% | 4.2% | 16.3% | 2.6% |
| 45 to 54 | 8.7% | 9.7% | 1.9% | 11.4% | 4.8% |
| 55 to 64 | 7.6% | 7.4% | 0.6% | 7.3% | 1.4% |
| 65 and over | 6.9% | 8.5% | 3.3% | 9.2% | 2.0% |
| TOTALS | 100.0% | 100.0% | 1.4% | 100.0% | 1.1% |

**CHARLESTON COUNTY**

| | 1980 | 1990 EST | COMP ANN. % CHG 80-90 | 1995 PROJ. | COMP ANN. % CHG 90-95 |
|---|---|---|---|---|---|
| Under 5 | 8.8% | 8.9% | 0.6% | 8.4% | -0.3% |
| 6 to 13 | 11.8% | 9.8% | -2.1% | 9.6% | -1.2% |
| 14 to 17 | 7.3% | 5.4% | -2.3% | 4.9% | -1.8% |
| 18 to 20 | 8.1% | 5.1% | -3.7% | 4.5% | -1.2% |
| 21 to 24 | 10.8% | 9.1% | -0.5% | 8.1% | -0.1% |
| 25 to 34 | 17.9% | 19.4% | 1.6% | 17.7% | -1.6% |
| 35 to 44 | 10.3% | 14.1% | 3.4% | 15.8% | 2.4% |
| 45 to 54 | 8.8% | 9.6% | 0.8% | 11.3% | 4.1% |
| 55 to 64 | 8.3% | 8.7% | 0.6% | 8.8% | 1.4% |
| 65 and over | 7.7% | 9.9% | 2.8% | 10.9% | 1.7% |
| TOTALS | 100.0% | 100.0% | 0.5% | 100.0% | 0.5% |

**CMA 2/**

| | 1980 | 1990 EST | COMP ANN. % CHG 80-90 | 1995 PROJ. | COMP ANN. % CHG 90-95 |
|---|---|---|---|---|---|
| Under 5 | 10.7% | 11.2% | -0.8% | 10.6% | -1.9% |
| 6 to 13 | 15.2% | 14.8% | -3.0% | 15.5% | -2.3% |
| 14 to 17 | 8.4% | 6.4% | -3.2% | 6.3% | -2.7% |
| 18 to 20 | 6.4% | 4.7% | -3.8% | 4.2% | -1.8% |
| 21 to 24 | 8.3% | 5.7% | -1.1% | 4.9% | -0.9% |
| 25 to 34 | 19.1% | 18.7% | 0.4% | 16.5% | -2.5% |
| 35 to 44 | 14.0% | 17.5% | 2.1% | 18.5% | 1.1% |
| 45 to 54 | 8.3% | 9.7% | 0.1% | 11.5% | 3.2% |
| 55 to 64 | 5.2% | 5.1% | 0.7% | 5.0% | 1.4% |
| 65 and over | 4.4% | 6.2% | 3.3% | 6.9% | 1.7% |
| TOTALS | 100.0% | 100.0% | -0.1% | 100.0% | -0.2% |

**CHARLESTON MSA /1**

| | 1980 | 1990 EST | COMP ANN. # CHG 80-90 | 1995 PROJ. | COMP ANN. # CHG 90-95 |
|---|---|---|---|---|---|
| Under 5 | 41,584 | 50,392 | 881 | 51,820 | 286 |
| 6 to 13 | 56,730 | 55,978 | (75) | 58,198 | 444 |
| 14 to 17 | 330,387 | 28,927 | (30,146) | 28,669 | (52) |
| 18 to 20 | 30,945 | 25,180 | (577) | 24,893 | (57) |
| 21 to 24 | 42,239 | 41,562 | (68) | 42,240 | 136 |
| 25 to 34 | 77,826 | 99,748 | 2,192 | 94,933 | (963) |
| 35 to 44 | 48,024 | 73,869 | 2,585 | 84,484 | 2,123 |
| 45 to 54 | 37,512 | 45,642 | 813 | 58,455 | 2,563 |
| 55 to 64 | 32,821 | 34,906 | 209 | 37,529 | 525 |
| 65 and over | 29,694 | 41,697 | 1,200 | 46,191 | 899 |
| TOTALS | 430,462 | 497,902 | 6,744 | 527,412 | 5,902 |

**CHARLESTON COUNTY**

| | 1980 | 1990 EST | COMP ANN. # CHG 80-90 | 1995 PROJ. | COMP ANN. # CHG 90-95 |
|---|---|---|---|---|---|
| Under 5 | 24,482 | 25,954 | 147 | 25,507 | (89) |
| 6 to 13 | 32,803 | 26,614 | (619) | 25,061 | (311) |
| 14 to 17 | 20,266 | 16,141 | (413) | 14,756 | (277) |
| 18 to 20 | 22,445 | 15,622 | (682) | 14,732 | (178) |
| 21 to 24 | 29,981 | 28,635 | (135) | 28,535 | (20) |
| 25 to 34 | 49,546 | 58,087 | 854 | 53,673 | (883) |
| 35 to 44 | 28,514 | 40,128 | 1,161 | 45,316 | 1,038 |
| 45 to 54 | 24,481 | 26,545 | 206 | 32,721 | 1,235 |
| 55 to 64 | 23,014 | 24,339 | 133 | 26,053 | 343 |
| 65 and over | 21,442 | 28,463 | 702 | 31,057 | 519 |
| TOTALS | 276,974 | 290,528 | 1,355 | 297,411 | 1,377 |

**CMA 2/**

| | 1980 | 1990 EST | COMP ANN. # CHG 80-90 | 1995 PROJ. | COMP ANN. # CHG 90-95 |
|---|---|---|---|---|---|
| Under 5 | 6,021 | 5,555 | (47) | 5,067 | (98) |
| 6 to 13 | 8,957 | 6,680 | (228) | 5,964 | (143) |
| 14 to 17 | 5,374 | 3,928 | (145) | 3,432 | (99) |
| 18 to 20 | 4,031 | 2,770 | (126) | 2,535 | (47) |
| 21 to 24 | 6,250 | 5,583 | (67) | 5,336 | (49) |
| 25 to 34 | 13,370 | 13,879 | 51 | 12,271 | (322) |
| 35 to 44 | 8,498 | 10,521 | 202 | 11,128 | 121 |
| 45 to 54 | 7,652 | 7,743 | 9 | 9,108 | 273 |
| 55 to 64 | 7,101 | 7,653 | 55 | 8,201 | 110 |
| 65 and over | 5,769 | 8,037 | 227 | 8,740 | 141 |
| TOTALS | 73,033 | 72,349 | (68) | 71,783 | (113) |

Note: 1/ The Charleston MSA includes Charleston, Berkeley, and Dorchester Counties.
2/ Includes Census Tracts 19.01, 19.02, 20.02, 20.03, 20.05, 20.06, 20.07, 26.02, 26.04, 26.05, 26.06, 27.01, 27.02, 28, 29, &30 within Charleston County.

SOURCE: ROBERT CHARLES LESSER & CO., BCD COUNCIL OF GOVERNMENTS, AND URBAN DECISION SYSTEMS

**EXHIBIT 4**
**NONFARMING EMPLOYMENT GROWTH AND PROJECTIONS**
**BY MAJOR INDUSTRY SECTOR FOR**
**CHARLESTON, SC MSA**
**1980-2000**



| MAJOR INDUSTRY GROUPS | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | PROJ. 1995 | PROJ. 2000 | ANNUAL CHANGES 80-85 | ANNUAL CHANGES 85-90 | ANNUAL CHANGES 90-95 | ANNUAL CHANGES 95-2000 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CHARLESTON, SC MSA | | | | | | | | | | | | | | | | | |
| MINING | 50 | 40 | 60 | 80 | 110 | 30 | 270 | 350 | 300 | 280 | 280 | 380 | 410 | -4 | 50 | 20 | 6 |
| CONSTRUCTION | 14,400 | 13,400 | 13,090 | 13,310 | 15,470 | 16,640 | 17,150 | 17,020 | 17,180 | 17,290 | 12,890 | 15,000 | 15,720 | 448 | -750 | 422 | 144 |
| MANUFACTURING | 19,920 | 21,460 | 19,730 | 19,370 | 20,550 | 20,380 | 20,230 | 20,410 | 21,350 | 21,450 | 20,820 | 22,630 | 22,930 | 92 | 88 | 362 | 60 |
| TRANS, COMM. & UTIL. | 9,690 | 10,010 | 9,810 | 9,460 | 9,700 | 10,160 | 10,390 | 11,630 | 12,690 | 12,030 | 13,530 | 15,700 | 17,050 | 94 | 674 | 434 | 270 |
| WHOLESALE TRADE | 7,320 | 7,710 | 7,610 | 7,760 | 8,340 | 8,550 | 8,360 | 8,500 | 8,870 | 9,070 | 9,150 | 10,420 | 11,240 | 246 | 120 | 254 | 164 |
| RETAIL TRADE | 29,160 | 30,840 | 31,840 | 33,660 | 37,160 | 39,860 | 41,170 | 43,470 | 44,930 | 45,440 | 45,720 | 55,800 | 62,770 | 2,140 | 1,172 | 2,016 | 1,394 |
| FIN., INS. & REAL EST. | 10,650 | 11,130 | 11,410 | 12,020 | 13,330 | 14,740 | 15,770 | 15,610 | 16,560 | 17,400 | 17,980 | 21,430 | 23,710 | 818 | 648 | 690 | 456 |
| SERVICES | 35,500 | 37,490 | 38,770 | 40,330 | 43,960 | 47,050 | 50,270 | 53,320 | 55,340 | 56,330 | 59,340 | 72,910 | 83,510 | 2,310 | 2,458 | 2,714 | 2,120 |
| OTHER /1 | 1,780 | 1,750 | 1,760 | 1,810 | 1,990 | 2,150 | 2,260 | 2,530 | 2,780 | 2,880 | 2,880 | 3,450 | 3,900 | 74 | 146 | 114 | 90 |
| GOVERNMENT | 75,620 | 79,670 | 80,290 | 81,460 | 82,740 | 83,800 | 84,310 | 85,660 | 86,550 | 87,360 | 90,540 | 92,960 | 95,220 | 1,636 | 1,348 | 484 | 452 |
| TOTAL EMPLOYMENT | 204,090 | 213,500 | 214,370 | 219,260 | 233,350 | 243,360 | 250,180 | 258,500 | 266,550 | 269,530 | 273,130 | 310,680 | 336,460 | 7,854 | 5,954 | 7,510 | 5,156 |
| ANNUAL CHANGE | - | 9,410 | 870 | 4,890 | 14,090 | 10,010 | 6,820 | 8,320 | 8,050 | 2,980 | 3,600 | 7,510 | 5,156 | | | | |
| ANNUAL % CHANGE | | 4.6% | 0.4% | 2.3% | 6.4% | 4.3% | 2.8% | 3.3% | 3.1% | 1.1% | 1.3% | 2.7% | 1.7% | | | | |

| MAJOR INDUSTRY GROUPS | 1980 % DIST. | 1981 % DIST. | 1982 % DIST. | 1983 % DIST. | 1984 % DIST. | 1985 % DIST. | 1986 % DIST. | 1987 % DIST. | 1988 % DIST. | 1989 % DIST. | 1990 % DIST. | 1995 % DIST. | 2000 % DIST. | ANNUAL CHANGES 80-85 | ANNUAL CHANGES 85-90 | ANNUAL CHANGES 90-95 | ANNUAL CHANGES 95-2000 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CHARLESTON, SC MSA | | | | | | | | | | | | | | | | | |
| MINING | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | -8.0% | 166.7% | 7.1% | 1.6% |
| CONSTRUCTION | 7.1% | 6.3% | 6.1% | 6.1% | 6.6% | 6.8% | 6.9% | 6.6% | 6.4% | 6.4% | 4.7% | 4.8% | 4.7% | 3.1% | -4.5% | 3.3% | 1.0% |
| MANUFACTURING | 9.8% | 10.1% | 9.2% | 8.8% | 8.8% | 8.4% | 8.1% | 7.9% | 8.0% | 8.0% | 7.6% | 7.3% | 6.8% | 0.5% | 0.4% | 1.7% | 0.3% |
| TRANS, COMM. & UTIL. | 4.7% | 4.7% | 4.6% | 4.3% | 4.2% | 4.2% | 4.2% | 4.5% | 4.8% | 4.5% | 5.0% | 5.1% | 5.1% | 1.0% | 6.6% | 3.2% | 1.7% |
| WHOLESALE TRADE | 3.6% | 3.6% | 3.5% | 3.5% | 3.6% | 3.5% | 3.3% | 3.3% | 3.3% | 3.4% | 3.4% | 3.4% | 3.3% | 3.4% | 1.4% | 2.8% | 1.6% |
| RETAIL TRADE | 14.3% | 14.4% | 14.9% | 15.4% | 15.9% | 16.4% | 16.5% | 16.8% | 16.9% | 16.9% | 16.7% | 18.0% | 18.7% | 7.3% | 2.9% | 4.4% | 2.5% |
| FIN., INS. & REAL EST. | 5.2% | 5.2% | 5.3% | 5.5% | 5.7% | 6.1% | 6.3% | 6.0% | 6.2% | 6.5% | 6.6% | 6.9% | 7.0% | 7.7% | 4.4% | 3.8% | 2.1% |
| SERVICES | 17.4% | 17.6% | 18.1% | 18.4% | 18.8% | 19.3% | 20.1% | 20.6% | 20.8% | 20.9% | 21.7% | 23.5% | 24.8% | 6.5% | 5.2% | 4.6% | 2.9% |
| OTHER /1 | 0.9% | 0.8% | 0.8% | 0.8% | 0.9% | 0.9% | 0.9% | 1.0% | 1.0% | 1.1% | 1.1% | 1.1% | 1.2% | 4.2% | 6.8% | 4.0% | 2.6% |
| GOVERNMENT | 37.1% | 37.3% | 37.5% | 37.2% | 35.5% | 34.4% | 33.7% | 33.1% | 32.5% | 32.4% | 33.1% | 29.9% | 28.3% | 2.2% | 1.6% | 0.5% | 0.5% |
| TOTAL EMPLOYMENT | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 3.8% | 2.4% | 2.7% | 1.7% |

1/ Other employment includes: Agricultural services, forestry, and fisheries

SOURCE: NATIONAL PLANNING ASSOCIATION, (PROJECTIONS REVISED 11/90)

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**EXHIBIT 4.1**
**NONFARMING EMPLOYMENT GROWTH AND PROJECTIONS**
**BY MAJOR INDUSTRY SECTOR FOR**
**CHARLESTON COUNTY**
**1980-2000**

| MAJOR INDUSTRY GROUPS | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | PROJ. 1995 | PROJ. 2000 | ANNUAL CHANGES 80-85 | ANNUAL CHANGES 85-90 | ANNUAL CHANGES 90-95 | ANNUAL CHANGES 95-2000 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CHARLESTON COUNTY | | | | | | | | | | | | | | | | | |
| MINING | 20 | 20 | 10 | 10 | 20 | 20 | 10 | 60 | 50 | 40 | 50 | 50 | 40 | 0 | 6 | 0 | -2 |
| CONSTRUCTION | 9,490 | 9,710 | 9,240 | 9,340 | 11,070 | 12,200 | 12,390 | 11,920 | 11,720 | 11,790 | 8,790 | 9,730 | 9,830 | 542 | -682 | 188 | 20 |
| MANUFACTURING | 11,320 | 12,060 | 10,970 | 9,930 | 10,070 | 10,080 | 9,830 | 9,710 | 9,890 | 9,940 | 9,640 | 9,280 | 8,610 | -248 | -88 | -72 | -134 |
| TRANS, COMM. & UTIL. | 8,520 | 8,800 | 8,570 | 8,150 | 8,230 | 8,500 | 8,590 | 9,680 | 10,660 | 10,110 | 11,370 | 12,830 | 13,630 | -4 | 574 | 292 | 160 |
| WHOLESALE TRADE | 6,270 | 6,880 | 6,740 | 6,770 | 7,170 | 7,360 | 7,400 | 7,400 | 7,800 | 7,980 | 8,050 | 8,980 | 9,540 | 218 | 138 | 186 | 112 |
| RETAIL TRADE | 24,100 | 25,450 | 25,860 | 27,200 | 29,890 | 31,980 | 32,900 | 34,190 | 35,000 | 35,390 | 35,610 | 41,980 | 46,040 | 1,576 | 726 | 1,274 | 812 |
| FIN., INS. & REAL EST. | 9,160 | 9,610 | 9,770 | 10,260 | 11,360 | 12,490 | 13,320 | 13,230 | 14,080 | 14,790 | 15,280 | 17,720 | 19,190 | 666 | 558 | 488 | 294 |
| SERVICES | 30,000 | 31,860 | 32,680 | 33,550 | 36,550 | 39,150 | 41,760 | 44,250 | 45,600 | 46,410 | 48,890 | 59,440 | 67,600 | 1,830 | 1,948 | 2,110 | 1,632 |
| OTHER /1 | 1,330 | 1,290 | 1,280 | 1,360 | 1,510 | 1,590 | 1,690 | 1,920 | 2,100 | 2,160 | 2,160 | 2,530 | 2,800 | | | | |
| GOVERNMENT | 66,020 | 69,930 | 70,230 | 71,160 | 71,750 | 72,420 | 72,880 | 74,030 | 74,500 | 75,220 | 77,700 | 78,670 | 79,630 | 1,280 | 1,056 | 194 | 192 |
| TOTAL EMPLOYMENT | 166,230 | 175,610 | 175,350 | 177,730 | 187,620 | 195,790 | 200,770 | 206,390 | 211,400 | 213,830 | 217,540 | 241,210 | 256,910 | 5,912 | 4,350 | 4,734 | 3,140 |
| % CAPTURE OF MSA EMPLOY.: | 81.4% | 82.3% | 81.8% | 81.1% | 80.4% | 80.5% | 80.3% | 79.8% | 79.3% | 79.3% | 79.6% | 77.6% | 76.4% | 75.3% | 73.1% | 63.0% | 60.9% |
| ANNUAL CHANGE | - | 9,380 | -260 | 2,380 | 9,890 | 8,170 | 4,980 | 5,620 | 5,010 | 2,430 | 3,710 | 4,734 | 3,140 | | | | |
| ANNUAL % CHANGE | | 5.6% | -0.1% | 1.4% | 5.6% | 4.4% | 2.5% | 2.8% | 2.4% | 1.1% | 1.7% | 2.2% | 1.3% | | | | |

| MAJOR INDUSTRY GROUPS | 1980 % DIST. | 1981 % DIST. | 1982 % DIST. | 1983 % DIST. | 1984 % DIST. | 1985 % DIST. | 1986 % DIST. | 1987 % DIST. | 1988 % DIST. | 1989 % DIST. | 1989 % DIST. | 1994 % DIST. | 2000 % DIST. | ANNUAL CHANGES 80-85 | ANNUAL CHANGES 85-90 | ANNUAL CHANGES 90-95 | ANNUAL CHANGES 95-2000 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CHARLESTON COUNTY | | | | | | | | | | | | | | | | | |
| MINING | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 30.0% | 0.0% | -4.0% |
| CONSTRUCTION | 5.7% | 5.5% | 5.3% | 5.3% | 5.9% | 6.2% | 6.2% | 5.8% | 5.5% | 5.5% | 4.0% | 4.0% | 3.8% | 5.7% | -5.6% | 2.1% | 0.2% |
| MANUFACTURING | 6.8% | 6.9% | 6.3% | 5.6% | 5.4% | 5.1% | 4.9% | 4.7% | 4.7% | 4.6% | 4.4% | 3.8% | 3.4% | -2.2% | -0.9% | -0.7% | -1.4% |
| TRANS, COMM. & UTIL. | 5.1% | 5.0% | 4.9% | 4.6% | 4.4% | 4.3% | 4.3% | 4.7% | 5.0% | 4.7% | 5.2% | 5.3% | 5.3% | 0.0% | 6.8% | 2.6% | 1.2% |
| WHOLESALE TRADE | 3.8% | 3.9% | 3.8% | 3.8% | 3.8% | 3.8% | 3.7% | 3.6% | 3.7% | 3.7% | 3.7% | 3.7% | 3.7% | 3.5% | 1.9% | 2.3% | 1.2% |
| RETAIL TRADE | 14.5% | 14.5% | 14.7% | 15.3% | 15.9% | 16.3% | 16.4% | 16.6% | 16.6% | 16.6% | 16.4% | 17.4% | 17.9% | 6.5% | 2.3% | 3.6% | 1.9% |
| FIN., INS. & REAL EST. | 5.5% | 5.5% | 5.6% | 5.8% | 6.1% | 6.4% | 6.6% | 6.4% | 6.7% | 6.9% | 7.0% | 7.3% | 7.5% | 7.3% | 4.5% | 3.2% | 1.7% |
| SERVICES | 18.0% | 18.1% | 18.6% | 18.9% | 19.5% | 20.0% | 20.8% | 21.4% | 21.6% | 21.7% | 22.5% | 24.6% | 26.3% | 6.1% | 5.0% | 4.3% | 2.7% |
| OTHER /1 | 0.8% | 0.7% | 0.7% | 0.8% | 0.8% | 0.8% | 0.8% | 0.9% | 1.0% | 1.0% | 1.0% | 1.0% | 1.1% | 3.9% | 7.2% | 3.4% | 2.1% |
| GOVERNMENT | 39.7% | 39.8% | 40.1% | 40.0% | 38.2% | 37.0% | 36.3% | 35.9% | 35.2% | 35.2% | 35.7% | 32.6% | 31.0% | 1.9% | 1.5% | 0.2% | 0.2% |
| TOTAL EMPLOYMENT | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 3.6% | 2.2% | 2.2% | 1.3% |

1/ Other employment includes: Agricultural services, forestry, and fisheries

SOURCE: NATIONAL PLANNING ASSOCIATION, (PROJECTIONS REVISED 11/90)
ROBERT CHARLES LESSER & CO.

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**EXHIBIT 5**
**TOTAL POTENTIAL MOVERS AND HOUSEHOLD INCOME AFFORDABILITY**
**FOR OWNER HOUSEHOLDS**
**THE CHARLESTON MSA, CHARLESTON COUNTY, AND THE CMA**

| | INCOME RANGE | PERCENT HOUSE-HOLDS | PROJ. 1990 HOUSE-HOLDS | TOTAL HOUSEHOLDS PROPENSITY BY PRICE RANGE: 1/ OWNERS | | RENTERS | | OWNER TURNOVER 2.5%-10% | NEW OWNER HH'S | 2/ TOTAL RENTER CONV. 2.5% | TOTAL POTENTIAL OWNER MOVERS | TOTAL OWNER MOVERS % DIST. | AFFORDABLE 3/ MONTHLY PAYMENTS | BASE AFFORDABLE 4/ HOME PRICE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CHARLESTON MSA | $0 - $9,999 | 18.1% | 31,633 | 39% | 12,337 | 61% | 19,296 | 308 | 260 | 0 | 568 | 6% | $0 - $230 | $0 - $28,000 |
| | $10,000 - $19,999 | 21.6% | 37,749 | 51% | 19,252 | 49% | 18,497 | 481 | 406 | 0 | 887 | 9% | $230 - $470 | $30,000 - $62,000 |
| | $20,000 - $29,999 | 18.0% | 31,458 | 56% | 17,616 | 44% | 13,841 | 881 | 371 | 346 | 1,598 | 17% | $470 - $700 | $62,000 - $92,000 |
| | $30,000 - $39,999 | 14.6% | 25,516 | 65% | 16,585 | 35% | 8,931 | 1,244 | 350 | 223 | 1,817 | 19% | $700 - $930 | $92,000 - $123,000 |
| | $40,000 - $49,999 | 10.5% | 18,350 | 70% | 12,845 | 30% | 5,505 | 1,285 | 271 | 138 | 1,693 | 18% | $930 - $1,170 | $123,000 - $154,000 |
| | $50,000 - $74,999 | 12.2% | 21,321 | 75% | 15,991 | 25% | 5,330 | 1,599 | 337 | 133 | 2,069 | 22% | $1,170 - $1,750 | $154,000 - $245,000 |
| | $75,000 - $99,999 | 2.8% | 4,893 | 80% | 3,915 | 20% | 979 | 391 | 83 | 24 | 498 | 5% | $1,750 - $2,330 | $245,000 - $326,000 |
| | $100,000 - + | 2.2% | 3,845 | 81% | 3,114 | 19% | 731 | 311 | 66 | 18 | 395 | 4% | $2,330 - + | $326,000 - + |
| | TOTAL | 100.0% | 174,766 | 58% | 101,656 | 42% | 73,110 | 6,501 | 2,143 | 883 | 9,527 | 100% | | |
| | Annual New Households: | | 3,684 | | | | | | | | | | | |
| CHARLESTON COUNTY | $0 - $9,999 | 19.5% | 20,668 | 33% | 6,820 | 67% | 13,848 | 341 | 99 | 554 | 994 | 14% | $0 - $170 | $0 - $22,000 |
| | $10,000 - $19,999 | 22.5% | 23,848 | 47% | 11,208 | 53% | 12,639 | 560 | 163 | 506 | 1,229 | 17% | $170 - $330 | $22,000 - $43,000 |
| | $20,000 - $29,999 | 17.6% | 18,654 | 54% | 10,073 | 46% | 8,581 | 755 | 146 | 343 | 1,245 | 18% | $330 - $500 | $43,000 - $66,000 |
| | $30,000 - $39,999 | 13.5% | 14,309 | 60% | 8,585 | 40% | 5,723 | 644 | 125 | 229 | 997 | 14% | $550 - $730 | $72,000 - $97,000 |
| | $40,000 - $49,999 | 9.6% | 10,175 | 65% | 6,614 | 35% | 3,561 | 661 | 96 | 142 | 900 | 13% | $800 - $1,000 | $106,000 - $132,000 |
| | $50,000 - $74,999 | 11.7% | 12,401 | 70% | 8,681 | 30% | 3,720 | 868 | 126 | 149 | 1,143 | 16% | $1,040 - $1,560 | $138,000 - $219,000 |
| | $75,000 - $99,999 | 3.1% | 3,286 | 75% | 2,464 | 25% | 821 | 246 | 36 | 33 | 315 | 4% | $1,630 - $2,170 | $228,000 - $304,000 |
| | $100,000 - + | 2.5% | 2,650 | 79% | 2,093 | 21% | 556 | 209 | 30 | 22 | 262 | 4% | $2,170 - + | $304,000 - + |
| | TOTAL | 100.0% | 105,990 | 53% | 56,539 | 47% | 49,451 | 4,286 | 821 | 1,978 | 7,085 | 100% | | |
| | Annual New Households: | | 1,539 | | | | | | | | | | | |
| CMA /5 | $0 - $9,999 | 13.9% | 3,921 | 44% | 1,725 | 56% | 2,196 | 86 | 13 | 88 | 187 | 10% | $0 - $170 | $0 - $22,000 |
| | $10,000 - $19,999 | 19.5% | 5,501 | 52% | 2,860 | 48% | 2,640 | 143 | 21 | 106 | 270 | 14% | $170 - $330 | $22,000 - $43,000 |
| | $20,000 - $29,999 | 17.3% | 4,880 | 60% | 2,928 | 40% | 1,952 | 220 | 22 | 78 | 320 | 16% | $330 - $500 | $43,000 - $66,000 |
| | $30,000 - $39,999 | 15.4% | 4,344 | 65% | 2,824 | 35% | 1,520 | 212 | 21 | 61 | 294 | 15% | $550 - $730 | $72,000 - $97,000 |
| | $40,000 - $49,999 | 11.5% | 3,244 | 75% | 2,433 | 25% | 811 | 243 | 18 | 32 | 294 | 15% | $800 - $1,000 | $106,000 - $132,000 |
| | $50,000 - $74,999 | 14.6% | 4,118 | 82% | 3,377 | 18% | 741 | 338 | 25 | 30 | 393 | 20% | $1,040 - $1,560 | $138,000 - $219,000 |
| | $75,000 - $99,999 | 4.4% | 1,241 | 82% | 1,018 | 18% | 223 | 102 | 8 | 9 | 118 | 6% | $1,630 - $2,170 | $228,000 - $304,000 |
| | $100,000 - + | 3.4% | 959 | 82% | 786 | 18% | 173 | 79 | 6 | 7 | 91 | 5% | $2,170 - + | $304,000 - + |
| | TOTAL | 100.0% | 28,208 | 64% | 17,951 | 36% | 10,257 | 1,422 | 134 | 410 | 1,967 | 100% | | |
| | Annual New Households: | | 211 | | | | | | | | | | | |

1/ Based on 1980 census distribution; Table H-8.
2/ Conversion of renters to ownership based on a 2.5% conversion factor.
3/ Based on 28% of gross monthly income applied toward housing, 9.5% interest rate and 30 year term.
4/ Based on 10% average down payment for incomes less than $50,000, and 15% down payment for incomes over $50,000.
5/ Includes Census Tracts 19.01, 19.02, 20.02, 20.03, 20.05, 20.06, 20.07, 26.02, 26.04, 26.05, 26.06, 27.01, 27.02, 28, 29, &30 within Charleston County.

SOURCE: Robert Charles Lesser & Co.

permits

02-3868
HCF
Apr-91

**EXHIBIT 6**
**RESIDENTIAL UNITS AUTHORIZED BY BUILDING PERMIT**
**THE CHARLESTON MSA, CHARLESTON COUNTY, AND JAMES ISLAND**
**1984-1990**

| | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 2/ 1990 | Average 1984-90 | % Dist. |
|---|---|---|---|---|---|---|---|---|---|
| **CHARLESTON MSA 1/** | | | | | | | | | |
| Single-family | 3,503 | 3,292 | 3,201 | 3,353 | 2,602 | 2,373 | 2,681 | 3,001 | 64% |
| Multifamily | 4,508 | 4,475 | 1,470 | 646 | 250 | 302 | 103 | 1,679 | 36% |
| Total | 8,011 | 7,767 | 4,671 | 3,999 | 2,852 | 2,675 | 2,784 | 4,680 | 100% |
| % Change from previous year | - - | -3.0% | -39.9% | -14.4% | -28.7% | -33.1% | -2.4% | | |
| Annual Number Change | | | | | | | | | |
| Single-family | (580) | (211) | (91) | 152 | (751) | (980) | 79 | | |
| Multifamily | 651 | (33) | (3,005) | (824) | (396) | (344) | (147) | | |
| Total | 71 | (244) | (3,096) | (672) | (1,147) | (1,324) | (68) | | |
| **CHARLESTON COUNTY** | | | | | | | | | |
| Single-family | 1,951 | 1,686 | 1,528 | 1,626 | 1,371 | 1,189 | 1,436 | 1,541 | 56% |
| Multifamily | 3,466 | 3,131 | 1,280 | 306 | 104 | 250 | 80 | 1,231 | 44% |
| Total | 5,417 | 4,817 | 2,808 | 1,932 | 1,475 | 1,439 | 1,516 | 2,772 | 100% |
| % Change from previous year | - - | -11.1% | -41.7% | -31.2% | -23.7% | -25.5% | 2.8% | | |
| Annual Number Change | | | | | | | | | |
| Single-family | (240) | (265) | (158) | 98 | (255) | (437) | 65 | | |
| Multifamily | 1,797 | (335) | (1,851) | (974) | (202) | (56) | (24) | | |
| Total | 1,557 | (600) | (2,009) | (876) | (457) | (493) | 41 | | |
| **CHARLESTON COUNTY CAPTURE OF MSA** | | | | | | | | | |
| Single-family | 56% | 51% | 48% | 48% | 53% | 50% | 54% | 51% | |
| Multifamily | 77% | 70% | 87% | 47% | 42% | 83% | 78% | 73% | |
| Total | 68% | 62% | 60% | 48% | 52% | 54% | 54% | 59% | |
| **JAMES ISLAND** | | | | | | | | | |
| Single-family | n/a | n/a | 214 | 176 | 162 | 113 | n/a | 166 | 65% |
| Multifamily | n/a | n/a | 352 | 4 | 5 | 0 | n/a | 90 | 35% |
| Total | n/a | n/a | 566 | 180 | 167 | 113 | n/a | 257 | 100% |
| % Change from previous year | - - | n/a | n/a | -68.2% | -7.2% | -37.2% | n/a | | |
| Annual Number Change | | | | | | | | | |
| Single-family | n/a | n/a | n/a | (38) | (14) | (63) | n/a | | |
| Multifamily | n/a | n/a | n/a | (348) | 1 | (4) | n/a | | |
| Total | n/a | n/a | n/a | (386) | (13) | (67) | n/a | | |
| **JAMES ISLAND % CAPT. OF CHARLES. COUNTY** | | | | | | | | | |
| Single-family | n/a | n/a | 14% | 11% | 12% | 10% | n/a | | |
| Multifamily | n/a | n/a | 28% | 1% | 5% | 0% | n/a | | |
| Total | n/a | n/a | 20% | 9% | 11% | 8% | n/a | | |

1/ The Charleston MSA includes Charleston, Berkeley, and Dorchester Counties.
2/ 1990 permit data from the BCD Council of Governments. James Island figures not yet available.

Source: Robert Charles Lesser & Co.; Berkeley, Charleston, Dorchester Council of Governments Regional Indicators 1988/1989; & The Bureau of the Census C-40 Report.

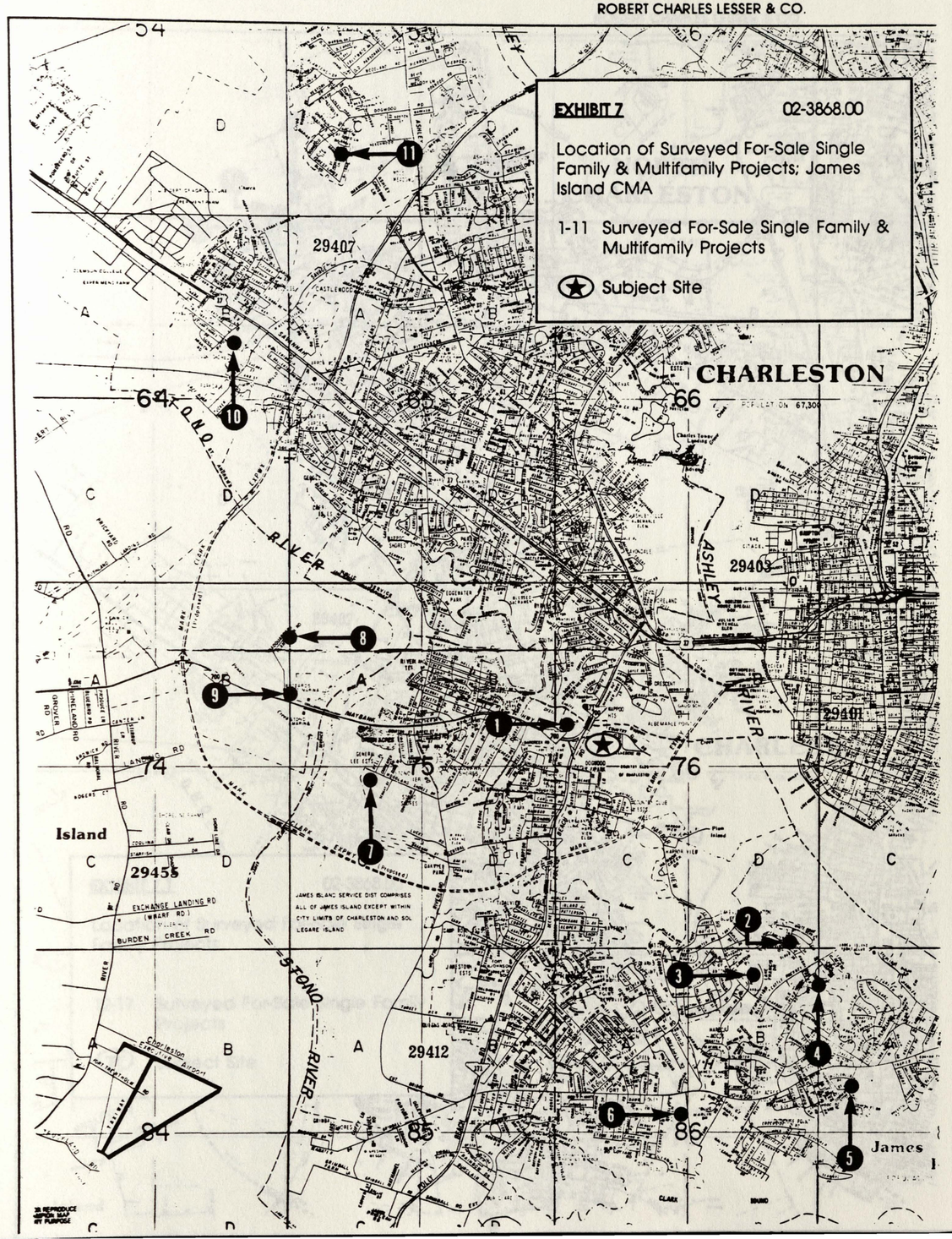
EXHIBIT 7
02-3868.00
Location of Surveyed For-Sale Single Family & Multifamily Projects; James Island CMA
1-11 Surveyed For-Sale Single Family & Multifamily Projects
Subject Site
CHARLESTON
29407
29403
29401
29455
29412
Island
JAMES ISLAND SERVICE DIST COMPRISES ALL OF JAMES ISLAND EXCEPT WITHIN CITY LIMITS OF CHARLESTON AND SOL LEGARE ISLAND
EXCHANGE LANDING RD (WHARF RD)
BURDEN CREEK RD
ASHLEY RIVER
STONO RIVER
64
74
75
76
84
85
86
James

ROBERT CHARLES LESSER & CO.

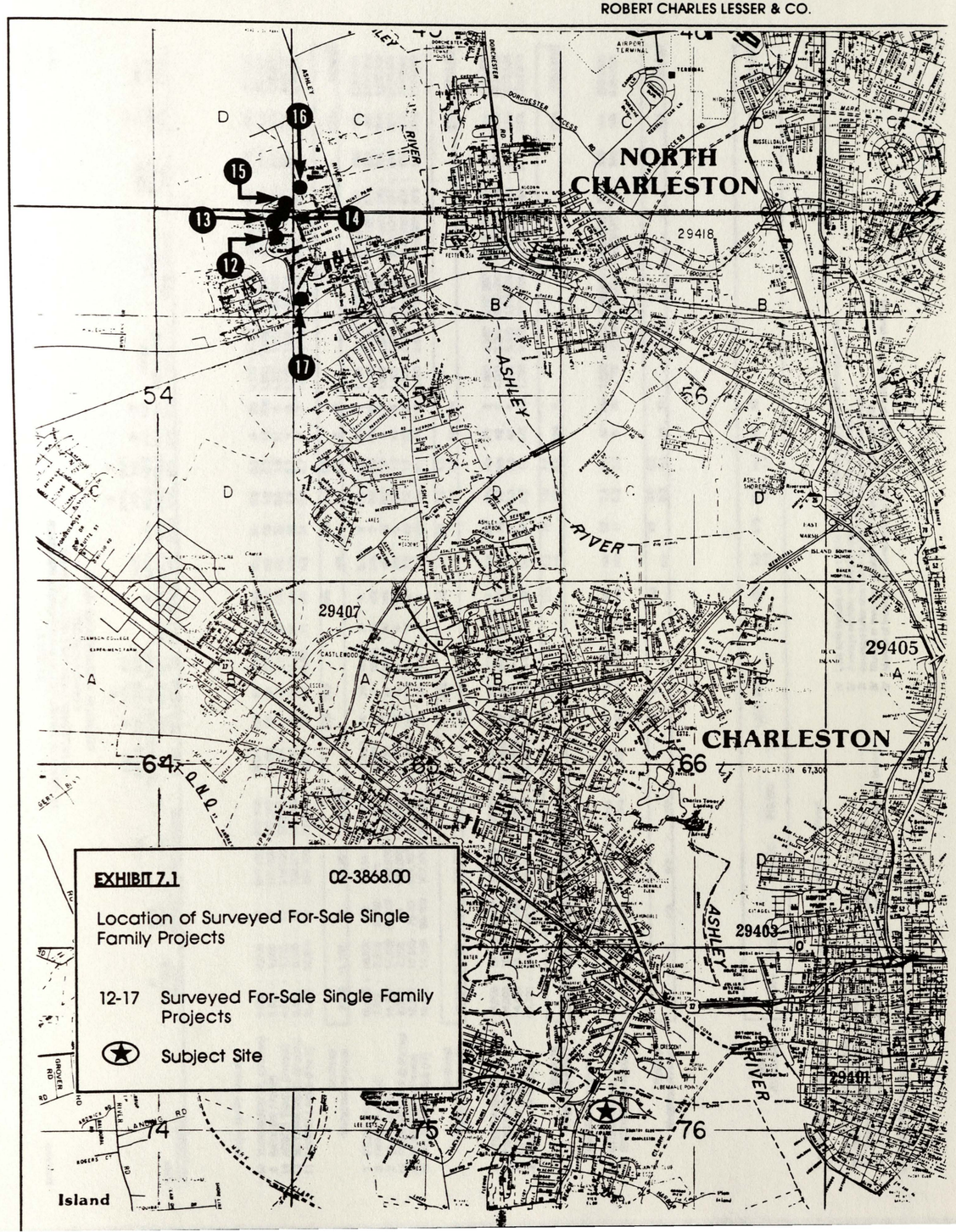


**EXHIBIT 7.1** 02-3868.00

Location of Surveyed For-Sale Single Family Projects

12-17 Surveyed For-Sale Single Family Projects

Subject Site

pricesum

02-3868
HCF
Apr-91

**EXHIBIT 8**
**SUMMARY OF SELECT ACTIVE SINGLE-FAMILY DETACHED AND MULTIFAMILY FOR-SALE PROJECTS IN THE CHARLESTON CMA**
**SORTED BY AVERAGE HOME PRICE**

| MAP KEY | PROJECT | 1/ LOT SIZE RANGE | AVG. LOT FRONT. | 2/ LOT PRICE RANGE | LOT SALES TO BUILD. OR INDIV. | 3/ TOT. LOTS/ HOMES | 4/ TOT. LOTS/ HOMES ERED | BEGAN HOME SALES | MOS. SELL. | 5/ LOTS SOLD | AVG. LOTS SOLD/ MO. | HOMES SOLD | 6/ AVG. HOMES SOLD/ MO. | 7/ CUR HOMES SOLD/ MO. | 8/ MO. AVA. INV. | 9/ MO. POT. INV. | HOME SIZE RANGE (S.F.) | BASE PRICE RANGE | VALUE RATIO ($/SF) | LOT TO HOME RATIO | AVG HOME PRICE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Single family projects:** | | | | | | | | | | | | | | | | | | | | | |
| 16 | TURNBERRY PL. (S'Moss) | 6,000 - 6,000 | 60 | $16,500 - $16,500 | BLDR | 224 | 87 | 7-89 | 21 | n/a | n/a | 80 | 3.8 | 3.3 | 2 | 36 | 1,120 - 1,735 | $72,900 - $95,000 | $65 - $55 | 20% | $83,950 |
| 6 | BAYVIEW FARMS | 9,600 - 9,600 | 80 | $21,000 - $22,000 | BLDR | 180 | 50 | 10-88 | 30 | n/a | n/a | 36 | 1.2 | 2.3 | 12 | 108 | 1,250 - 2,068 | $80,500 - $120,000 | $64 - $58 | 21% | $92,000 |
| 14 | ARBOR TRACE (S'moss) | 4,800 - 4,800 | 40 | $16,000 - $20,000 | BLDR | 47 | 47 | 6-87 | 46 | n/a | n/a | 28 | 0.6 | 1.0 | 31 | 0 | 1,300 - 1,810 | $85,950 - $105,950 | $66 - $59 | 19% | $95,950 |
| 13 | MAYFAIR MEAD. (S'moss) | 5,400 - 5,400 | 45 | $20,000 - $30,000 | BLDR | 58 | 58 | 11-88 | 30 | n/a | n/a | 54 | 1.8 | 0.7 | 2 | 0 | 1,250 - 1,900 | $88,500 - $105,000 | $71 - $55 | 26% | $96,750 |
| 11 | FOREST LAKES (Phs II) | 10,890 - 32,670 | 80 | $27,500 - $31,500 | BLDR | 70 | 50 | 5-90 | 11 | n/a | n/a | 31 | 2.8 | 2.7 | 7 | 7 | 1,492 - 2,140 | $89,125 - $106,120 | $60 - $50 | 30% | $100,000 |
| | **Subtotal** | | | | | 579 | 292 | | | n/a | | 229 | 10.2 | 9.9 | | | | | | | |
| | **Weighted Average** | 7,300 - 11,700 | 61 | $20,200 - $24,000 | | | | | | | n/a | | 2.4 | 2.2 | 6 | 28 | | | | 23% | $90,500 |
| 7 | STONE EDGE | 10,000 - 14,000 | 100 | $19,800 - $21,800 | BLD./IND. | 36 | 36 | 4-89 | 24 | 4 | 0.1 | 2 | 0.1 | 0.3 | 408 | 0 | 1,200 - 1,800 | $85,000 - $150,000 | $71 - $83 | 18% | $101,000 |
| 3 | HARBOR PLACE | 7,900 - 8,316 | 50-65 | n/a - n/a | BLDR | 20 | 7 | 10-88 | 30 | n/a | n/a | 0 | 0.0 | 0.0 | n/a | n/a | 1,575 - 1,750 | $115,000 - $120,000 | $73 - $69 | n/a | $117,500 |
| 2 | WHITEHURST | 14,550 - 14,550 | 45-100 | $22,000 - $45,000 | BLDR | 27 | 27 | 10-88 | 30 | n/a | n/a | 21 | 0.7 | 1.0 | 9 | 0 | 1,600 - 2,800 | $105,000 - $180,000 | $66 - $64 | 24% | $130,000 |
| 12 | FAIRWAY OAKS @ S'moss | 6,000 - 6,000 | 60 | $24,000 - $33,000 | BLDR | 10 | 10 | 11-90 | 6 | n/a | n/a | 3 | 0.5 | 1.3 | 14 | 0 | 1,500 - 2,400 | $115,000 - $150,000 | $77 - $63 | 22% | $132,500 |
| 15 | DUNWOODY (S'moss) | 10,890 - 10,890 | 75-80 | $21,500 - $34,500 | BLDR/IND | 162 | 112 | 10-89 | 18 | 4 | 2.0 | 40 | 2.2 | 1.7 | 32 | 23 | 1,800 - 2,200 | $115,000 - $165,000 | $64 - $75 | 20% | $140,000 |
| 10 | SYLVAN SHORES (IV) | 14,550 - 14,550 | 90-100 | $37,000 - $38,000 | IND | 36 | 36 | 1-91 | 4 | 4 | 1.0 | n/a | n/a | n/a | 32 | 0 | 2,000 - 2,600 | $155,000 - $165,000 | $78 - $63 | 23% | $160,000 |
| | **Subtotal** | | | | | 291 | 228 | | | 12 | 3.1 | 66 | 3.5 | 4.3 | | | | | | | |
| | **Weighted Average** | 10,600 - 11,400 | varies | $24,900 - $34,500 | | | | | | | 1.0 | | 1.6 | 1.4 | 46 | 18 | | | | 21% | $134,800 |
| 4 | STILES POINT, phase III | 15,000 - 18,000 | 90-100 | $28,000 - $120,000 | IND. | 44 | 44 | 12-90 | 5 | 7 | 1.4 | n/a | n/a | n/a | 26 | 0 | 1,800 - 3,500 | $120,000 - $249,000 | $67 - $71 | n/a | $184,500 |
| 5 | PARROT CREEK | 14,000 - 15,000 | 70-80 | $27,800 - $125,000 | BLDR/IND | 97 | 97 | 6-86 | 58 | 72 | 1.2 | 56 | 1.0 | n/a | 42 | 0 | 1,800 - 3,200 | $125,000 - $350,000 | $69 - $109 | 32% | $237,500 |
| 17 | ESTATES @ S'Moss | 14,520 - 21,780 | varies | $35,000 - $46,000 | BLD./IND. | 29 | 29 | 4-91 | 12 | 14 | 1.2 | 6 | 0.5 | 0.5 | 46 | 0 | 2,800 - 3,500 | $175,000 - $300,000 | $63 - $86 | 17% | $237,500 |
| 8 | HEADQUARTERS IS. | 21,780 - 21,780 | 100-140 | $34,900 - $92,000 | BLD./IND. | 117 * | 117 | 4-85 | 72 | 32 | 0.4 | 13 | 0.2 | 1.0 | 576 | n/a | 1,700 - 3,400 | $150,000 - $350,000 | $88 - $103 | 25% | $250,000 |
| | **Subtotal** | | | | | 287 | 287 | | | 125 | 4.3 | 75 | 1.6 | 1.5 | | | | | | | |
| | **Weighted Average** | 16,300 - 19,100 | varies | $31,400 - $95,800 | | | | | | | 1.0 | | 0.8 | 0.8 | 129 | 0 | | | | 25% | $234,400 |
| **Multi-family projects:** | | | | | | | | | | | | | | | | | | | | | |
| 9 | STONO WATCH TH (HQ IS.) | n/a - n/a | n/a | n/a - n/a | n/a | 40 * | 40 | 4-85 | 72 | n/a | n/a | 32 | 0.4 | 0.0 | 18 | n/a | 1,625 - 1,625 | $126,900 - $134,900 | $78 - $83 | n/a | $130,900 |
| 1 | RIVERSIDE @ Wappoo Cr. | n/a - n/a | n/a | n/a - n/a | n/a | 30 | 15 | 6-89 | 22 | n/a | n/a | 11 | 0.5 | 0.3 | 8 | 30 | 1,350 - 2,600 | $115,000 - $168,000 | $85 - $65 | n/a | $141,500 |
| | **Subtotal** | | | | | 70 | 55 | | | n/a | | 43 | 0.9 | 0.3 | | | | | | | |
| | **Weighted Average** | n/a - n/a | n/a | n/a - n/a | | | | | | | n/a | | 0.5 | 0.1 | 13 | 16 | | | | n/a | $135,300 |
| | **TOTAL** | | | | | 1,227 | 862 | | | 137 | 7.4 | 413 | 16.3 | 16.1 | 27 | 22 | | | | 23% | $137,200 |
| | **AVERAGE** | 11,100 - 12,200 | | $24,900 - $49,500 | | | | | | | 1.0 | | 1.8 | 1.7 | | | | | | | |

* Total number of lots/homes once the development is complete is to be determined.

1/ Average lot sizes per plats approved.
2/ Developed lot prices including premiums.
3/ Total number of homes once the development is complete.
4/ Total number of lots and/or speculative homes offered for sale to date to prospective buyers.
5/ Lots sold include all lots sold to builders, individual,and builder/developer owned.
6/ Average monthly sales absorption over the life of the project.
7/ Average sales absorption for the most recent six month period.
8/ Months of inventory of lots/homes offered for sale but unsold.
9/ Months of inventory of homes planned but not yet offered for sale (i.e. future phases).

SOURCE: Robert Charles Lesser & Co.

pricesum

**EXHIBIT 8, page 2**
**SUMMARY OF SELECT ACTIVE SINGLE-FAMILY DETACHED AND MULTIFAMILY FOR-SALE PROJECTS IN THE CHARLESTON CMA**
**SORTED BY AVERAGE HOME PRICE**

02-3868
HCF
Apr-91

| MAP KEY | PROJECT | AREA | ORIEN-TATION | AVG HOME PRICE | AVG. LOTS SOLD/ MO. | AVG. HO-MES SOLD/ MO. | 6/ CUR HO-MES SOLD/ MO. | BUYER PROFILE 10/ SING/ COUP | SM FAM | MAT FAM | E.N. | BUYER COMMENTS | 11/ AMENITIES | COMMENTS |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 19 | TURNBERRY PL. (S'Moss) | W. Ashley | Glf. Comm. | $83,950 | n/a | 3.8 | 3.3 | 50% | 50% | 0% | 0% | First-time home buyers | T,P,G | Membership into semi-private club avail.--$1,000 init. |
| 13 | BAYVIEW FARMS | James Isle. | Marshview | $92,000 | n/a | 1.2 | 2.3 | 40% | 40% | 0% | 20% | Buyers from the NE and local mkt. | T,P | Least and most expensive plans are best-sellers. |
| 25 | ARBOR TRACE (S'moss) | W. Ashley | Glf. Comm. | $95,950 | n/a | 0.6 | 1.0 | 30% | 0% | 0% | 70% | Yng. prof. coup. w/o child.; E.N. | T,P,G | $4,000 premium for golf lots. |
| 12 | MAYFAIR MEAD. (S'moss) | W. Ashley | Glf. Comm. | $96,750 | n/a | 1.8 | 0.7 | 45% | 15% | 0% | 39% | Mostly couples w/o child.; 65% local | T,P,G | Premium for golf lots --$6,000 to $10,000 |
| 3 | FOREST LAKES (Phs II) | W. Ashley | Pond | $100,000 | n/a | 2.8 | 2.7 | 55% | 33% | 10% | 2% | Yng prof. coup., some w/children | P,T,CLUB | $2,000 to $4,000 prem. for pond and cul-de-sac lots. |
| 7 | STONE EDGE | James Isle. | None | $101,000 | 0.1 | 0.1 | 0.3 | 20% | 80% | 0% | 0% | Mostly young families | None | Relatively flat topography with few trees. |
| 6 | HARBOR PLACE | James Isle. | None | $117,500 | n/a | 0.0 | 0.0 | n/a | n/a | n/a | n/a | No buyers to date | None | Developer bankrupt--units going back to bank. |
| 18 | WHITEHURST | James Isle. | Lake | $130,000 | n/a | 0.7 | 1.0 | 0% | 60% | 35% | 5% | Local move-ups; young families | None | Interior lots--$22,000 to $28,000; lakefront--$45,000 |
| 8 | FAIRWAY OAKS @ S'moss | W. Ashley | Glf. Comm. | $132,500 | n/a | 0.5 | 1.3 | 0% | 100% | 0% | 0% | All younger families with children | T,P,G | Interior lots -- $24,000, golf lots -- $30,000 to $33,000 |
| 16 | DUNWOODY (S'moss) | W. Ashley | Glf. Comm. | $140,000 | 2.0 | 2.2 | 1.7 | 20% | 20% | 40% | 20% | Move-up families | T,P,G | Began selling lots to indiv. 2 mo.s ago--4 sales to date. |
| 19 | SYLVAN SHORES (IV) | W. Ashley | None | $160,000 | 1.0 | n/a | n/a | 0% | 50% | 50% | 0% | Both young and mature fam. w/child | None | New phse to exist. proj.; access to Stono R. boat landg |
| 11 | STILES POINT, phase III | James Isle. | Marshview | $184,500 | 1.4 | n/a | n/a | 0% | 20% | 60% | 20% | Mature fam. with children; retirees | T,P,CLUB (planned) | Cust. bldrs. only to date; Int. lots--$28,000-$48,000 |
| 5 | PARROT CREEK | James Isle. | Waterfront | $237,500 | 1.2 | 1.0 | n/a | 0% | 60% | 20% | 20% | Families in 40's w/children; retirees | None | Marsh lots--$46,500 - $67,800; waterfront--$125,000. |
| 15 | ESTATES @ S'Moss | W. Ashley | Glf. Comm. | $237,500 | 1.2 | 0.5 | 0.5 | 0% | 5% | 90% | 5% | Local mat. families; 3rd or 4th home | T,P,G | Most lot sales have been to individuals. |
| 10 | HEADQUARTERS IS. | John's Is. | Waterfront | $250,000 | 0.4 | 0.2 | 1.0 | 0% | 0% | 80% | 20% | Mature families with children | None | Waterfront lots--$86,500 to $92,000. |
| | STONO WATCH TH (HQ IS. | John's Is. | None | $130,900 | n/a | 0.4 | 0.0 | 50% | 0% | 0% | 50% | Young couples, no children; EN | P,CAB | Just released 8 in 1-91, no sales of these units to date. |
| | RIVERSIDE @ Wappoo Cr. | James Isle. | Wappoo Cr | $141,500 | n/a | 0.5 | 0.3 | 45% | 0% | 0% | 55% | Mostly singles & EN; some couples | T,P (planned); dock | Overlooking Wappoo Creek; across from site. |
| | **TOTAL** | | | | 7.4 | 16.3 | 16.1 | | | | | | | |
| | **AVERAGE** | | | $137,200 | 1.0 | 1.8 | 1.7 | 20% | 33% | 25% | 22% | | | |

10/ SING/COUP-Singles and Young couples, SM FAM-Young families, 2-4 persons; MAT FAM - Larger, more mature Families, 4+ people; E.N. - Empty Nesters.
11/ CLUB-Clubhouse, P-pool, T-Tennis, G-Golf

SOURCE: Robert Charles Lesser & Co.

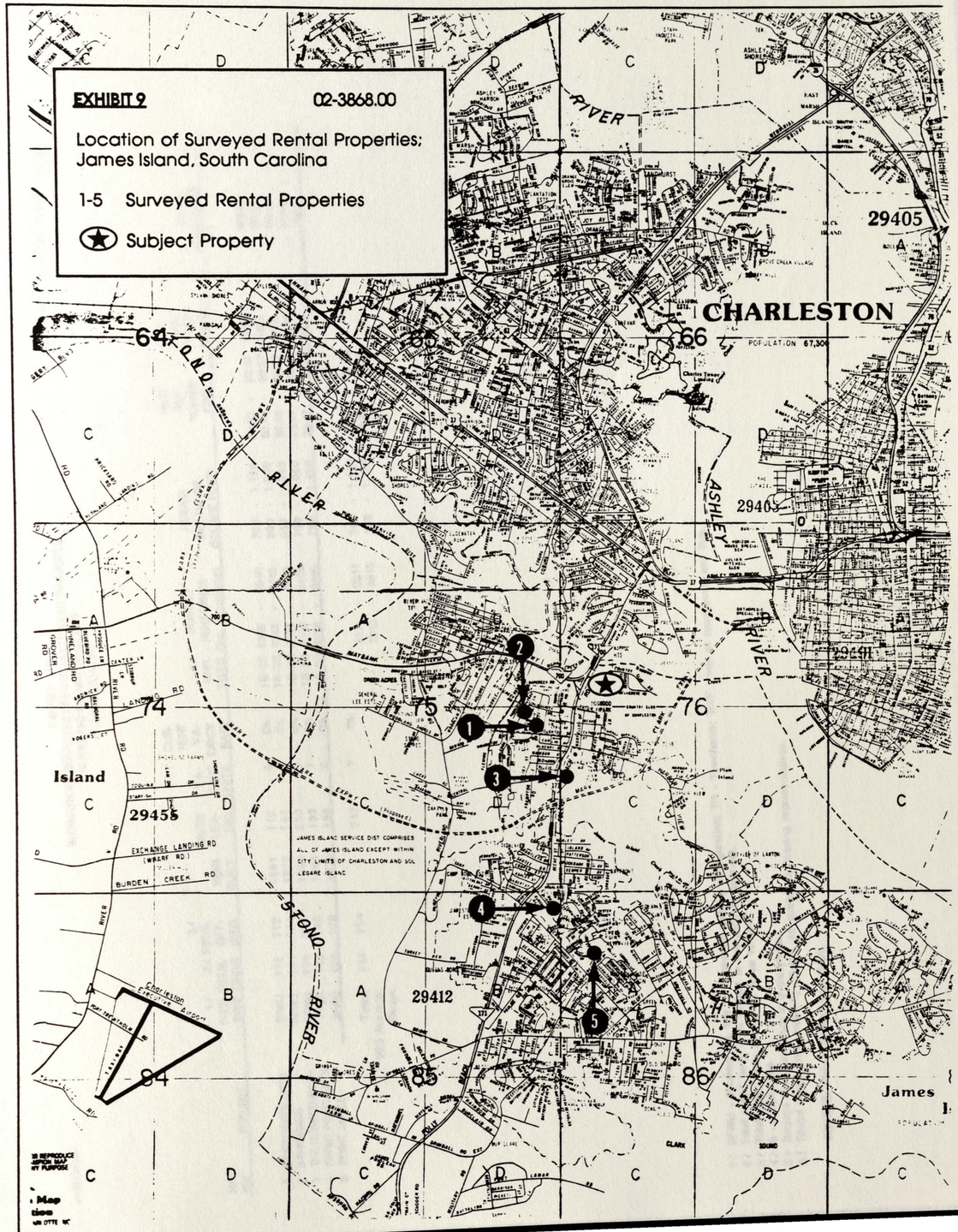
EXHIBIT 9
02-3868.00
Location of Surveyed Rental Properties;
James Island, South Carolina
1-5 Surveyed Rental Properties
Subject Property
CHARLESTON
POPULATION 67,300
29405
29455
29412
James Island
JAMES ISLAND SERVICE DIST COMPRISES ALL OF JAMES ISLAND EXCEPT WITHIN CITY LIMITS OF CHARLESTON AND SOL LEGARE ISLAND
EXCHANGE LANDING RD (WHARF RD.)
BURDEN CREEK RD
STONO RIVER
ASHLEY RIVER
64
65
66
74
75
76
84
85
86

rentalsum

**EXHIBIT 10**
**SUMMARY OF SELECTED RENTAL APARTMENT PROJECTS**
**SURVEYED ON JAMES ISLAND**
**CHARLESTON, SC**

02-3868
HISTORIC CHARLESTON FOUNDATION
Apr-91

| MAP KEY | PROJECT | 1/ PROD TYPE | 2/ TOTAL UNITS | 3/ TOTAL OFF-ERED | YEAR BUILT | UNITS LEA-SED | VA-CANT UNITS | CUR-RENT VA-CANCY RATE | 4/ UNIT TYPES | MONTHLY RENT RANGE (inc. premiums) | HEATED SIZE RANGE (SQUARE FOOT) | RENT PER SQUARE FOOT | 5/ AVG. RENT/ MONTH | 6/ INCENTIVES |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | BRIERGREEN APTS | SFWU | 112 | 112 | 1981 | 112 | 0 | 0% | 1B-3B | $385 - $540 | 700 - 1,150 | $0.55 - $0.47 | $463 | None |
| 2 | SAWGRASS | SFWU | 144 | 144 | 1978 | 144 | 0 | 0% | 1B-3B | $345 - $440 | 800 - 1,200 | $0.43 - $0.37 | $393 | None |
| 3 | THE QUARTERDECK | SFWU | 230 | 230 | 1986 | 230 | 0 | 0% | 1B-2B | $405 - $615 | 598 - 986 | $0.68 - $0.62 | $510 | None |
| 4 | RIVER POINT APTS | TH/F | 140 | 140 | 1981 | 133 | 7 | 5% | 1B-2B | $350 - $400 | 750 - 1,050 | $0.47 - $0.38 | $375 | None |
| 5 | POINT JAMES | SFWU | 128 | 128 | 1974 | 128 | 0 | 0% | 1B-3B | $350 - $495 | 750 - 1,400 | $0.47 - $0.35 | $423 | None |
| | Total: | | 754 | 754 | | 747 | 7 | 1% | | | | | | |
| | Wtd Average: | | | | | | | | | $371 - $511 | 705 - 1,134 | $0.54 - $0.46 | | |
| | Range: | | | | | | | | | $345 - $615 | 598 - 1,400 | $0.68 - $0.35 | | |

1/ SFWU - Stacked flat, two or three-story walk-up configuration; TH - Townhome; TH/F - mix of townhomes and flats.
2/ Total rental units once project is complete or built-out.
3/ Total rental units offered for lease to date.
4/ B - # bedrooms
5/ Average based on range in quoted rents.
6/ Rental concessions presently offered, as quoted by leasing representatives.

SOURCE: Robert Charles Lesser & Co.

rentalsum

02-3868
HISTORIC CHARLESTON FOUNDATION
Apr-91

**EXHIBIT 10, PAGE 2**
**SUMMARY OF SELECTED RENTAL APARTMENT PROJECTS**
**SURVEYED ON JAMES ISLAND**
**CHARLESTON, SC**

| MAP KEY | PROJECT | RENTER PROFILE | RENTER COMMENT/ EMPLOYMENT | 7/ AMENITIES | COMMENTS |
|---|---|---|---|---|---|
| 1 | BRIERGREEN APTS | Mix of singles, couples, retirees | Ages 25+, many have lived there for many years | CL,T,P | Usually stay leased up, averaging 97% |
| 2 | SAWGRASS | 40% ret., 25% sing., 20% coup, 15% fam. | Less than 5% military, some students | CL,T, P | Financed through HUD, rent restricted units |
| 3 | THE QUARTERDECK | 50% sing, 30% coup, 10% fam, 10% ret | Avg age 32, mostly professionals, a lot of out-of-sta | 2 P,2T,CL,J,VB | 8 units on notice, receive 6-7 notices/month |
| 4 | RIVER POINT APTS | 50-60% ret, 30% coup & fam, 20% sing | 10% military, single parents with children | CL,T,P,VB,Cable | Offer corporate leases (1 currently) |
| 5 | POINT JAMES | Mix of ret., sing., young families | Some students (create majority of turnover) | CLB,T, P | Waiting list for 2B units |

7/ P-Pool, T- Tennis, VB - Volleyball, CLB- Clubhouse, Cable - free cable, J- jacuzzi

SOURCE: Robert Charles Lesser & Co.

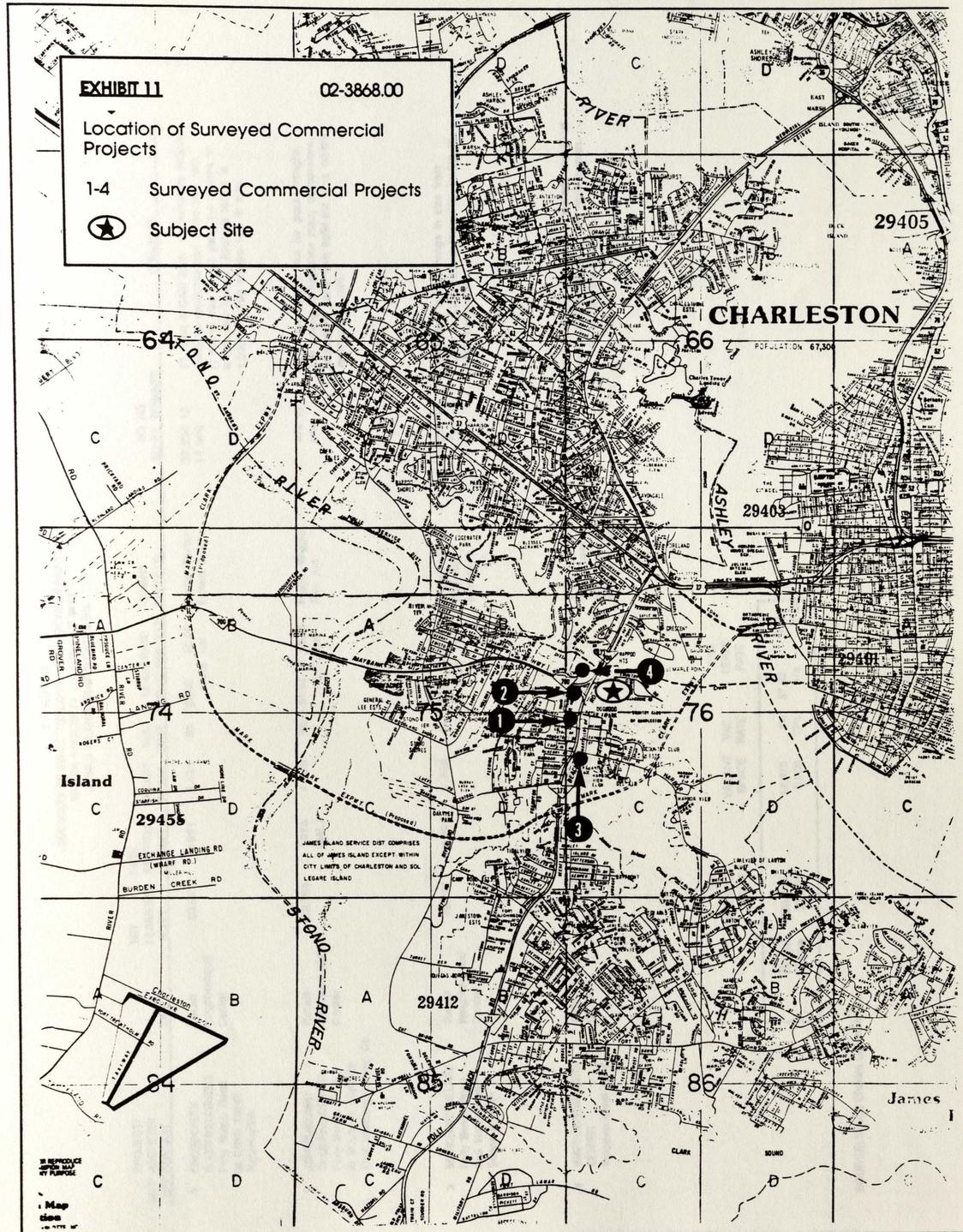
EXHIBIT 11
02-3868.00
Location of Surveyed Commercial Projects
1-4 Surveyed Commercial Projects
Subject Site
CHARLESTON
POPULATION 67,300
29405
29403
29401
29455
29412
Island
James
RIVER
ASHLEY
STONO
RIVER
64
65
66
74
75
76
84
85
86
JAMES ISLAND SERVICE DIST COMPRISES ALL OF JAMES ISLAND EXCEPT WITHIN CITY LIMITS OF CHARLESTON AND SOL LEGARE ISLAND
EXCHANGE LANDING RD (WHARF RD.)
BURDEN CREEK RD
Charleston Executive Airport
1
2
3
4

**EXHIBIT 12**
**SUMMARY OF SELECTED COMMERCIAL DEVELOPMENTS**
**WITHIN PROXIMITY TO SUBJECT SITE**
**JAMES ISLAND, SOUTH CAROLINA**

02-3868
HCF
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| MAP KEY | PROJECT/ ADDRESS/ CONTACT | TYPE | NET LEASABLE SQ.FT. | DATE STARTED LEASING | VACANT SPACE | VAC. RATE | LEASE RATE PER SQUARE FOOT | TENANT PROFILES | NO. SQ. FT. | NO. TENANTS | COMMENTS |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | CROSS CREEK SHOPPING CENTER<br>Folly Beach Road at Cross Creek<br>Newmarket | Retail<br>Neighborhood Center | 69,003 | 1981 | 5,425 | 8% | $7.00 - $8.00<br>triple net | Harris Teeter<br>Eckerd Drugs | 33,250<br>14,000 | 13 | $1.79/sq ft CAM fees. Concessions include build-out expenses and some free rent (1 month free on a 3 year, 1-4 months on a five year lease.) Average tenant is 1,000 to 2,000 square feet in size. |
| 2 | JAMES ISLAND SHOPPING CENTER<br>Folly Beach Road at Maybank Highway<br>First Washington Dev. Co. | Retail<br>Neighborhood Center | 88,754 | 1975 (est.) | 4,495 | 5% | $6.00 - $9.00<br>triple net | Piggly Wiggly<br>Rite Aid | n/a<br>n/a | 19 | $1.12/per square foot for pass-throughs. Not having to negotiate many concessions, sometimes some free build-out or a couple months free rent. |
| 3 | MERCHANT VILLAGE<br>Folly Beach Road and Harborview<br>Edens & Avant | Retail<br>Neighborhood Center | 78,857 | 1985 | 2,950 | 4% | $9.00 - $9.00<br>triple net | Winn-Dixie<br>Rite Aid<br>Firestone | 35,000<br>6,720<br>n/a | 12 | Remaining tenants range in size from 1,200 to 4,000 square feet. Not having to offer concessions. |
| 4 | WAPPOO EXECUTIVE CENTER<br>Wappoo Creek Drive | Neighborhood Office | 30,000 (total building) | 1988 | 5,000 (est) | 17% | n/a - n/a | Small professional office users attorneys, accountants, engineers, insurance | n/a | n/a | Space can be purchased or leased. Individual seller offering space on top floor (approx. 5,000 sq. ft.) for $110,000. |

| | NET LEASABLE SQ FT. | VACANT SPACE | VAC. RATE | AVG LEASE RATE |
|---|---|---|---|---|
| Retail | 236,614 | 12,870 | 5% | $7.33 - $8.67 |
| Office | 30,000 | 5,000 | 17% | n/a - n/a |

SOURCE: Robert Charles Lesser & Co.

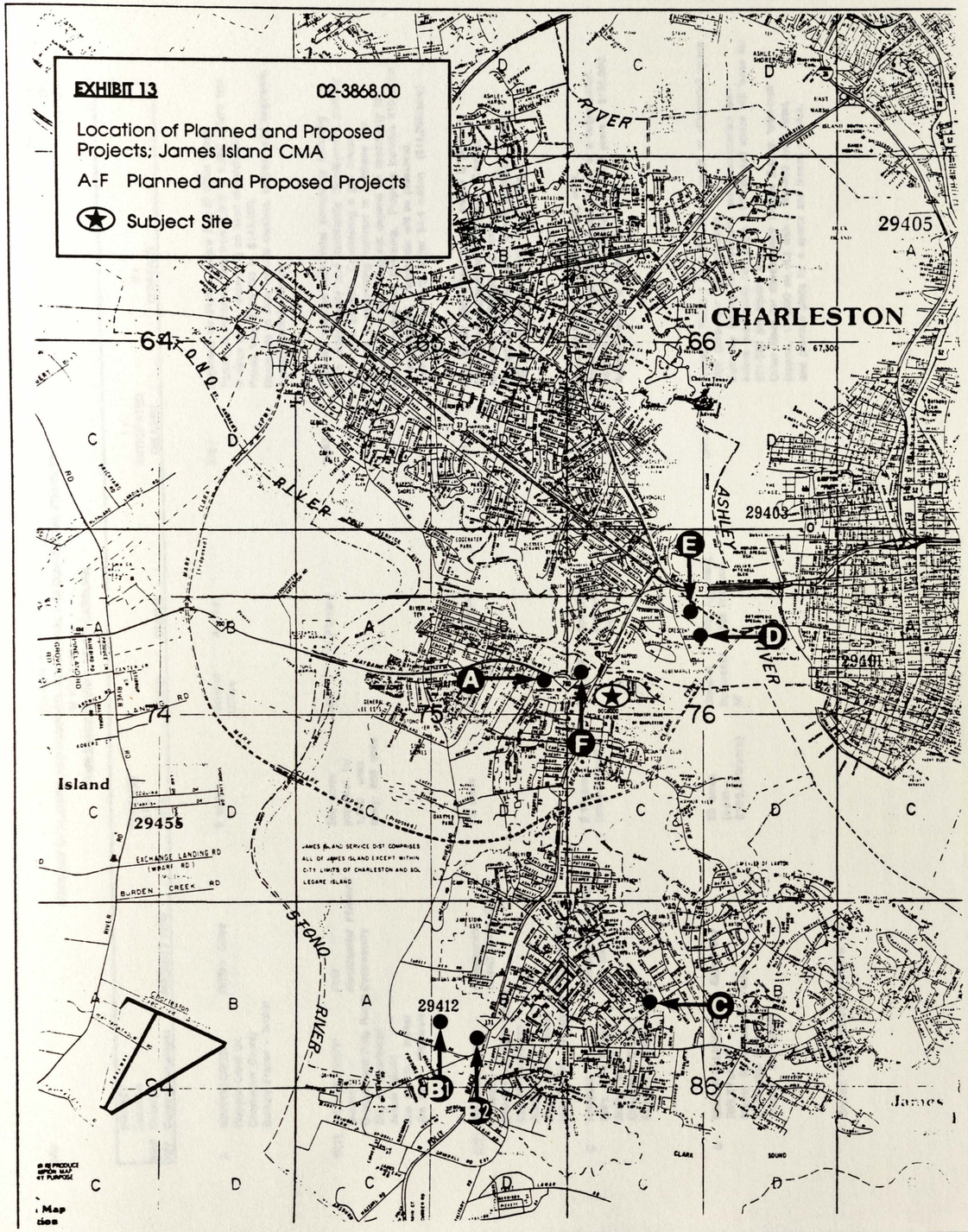
EXHIBIT 13
02-3868.00
Location of Planned and Proposed Projects; James Island CMA
A-F Planned and Proposed Projects
Subject Site
CHARLESTON
29405
29403
29401
29412
29455
James Island
ASHLEY RIVER
STONO RIVER
BURDEN CREEK RD
EXCHANGE LANDING RD (WHARF RD)
JAMES ISLAND SERVICE DIST COMPRISES ALL OF JAMES ISLAND EXCEPT WITHIN CITY LIMITS OF CHARLESTON AND SOL LEGARE ISLAND
A
B
B1
B2
C
D
E
F

p&p

02-3868.00
HCF
Apr-91

**EXHIBIT 14**
**SUMMARY OF PLANNED AND PROPOSED RESIDENTIAL AND COMMERCIAL PROJECTS**
**IN THE CMA**
**CHARLESTON COUNTY, SOUTH CAROLINA**

| MAP KEY | PROJECT Location County Contact/Developer | *PRODUCT TYPE* | ACREAGE/ LOTS/ UNITS | ZONING | STATUS | 1/ ANTICIPATED DELIVERY | 2/ COMMENTS |
|---|---|---|---|---|---|---|---|
| A | WAPPOO CREEK<br>Wappoo Creek Dr.<br>Charleston County<br>Barkely-Fraser - broker | ***Office Sites*** | 3 acres | General Office | Active | n/a | Approved for 36,000 square feet of office space.<br>Parcels to accommodate from 3,000 to 6,000 square feet of office space, depending on need of purchaser.<br>Priced from $105,000 to $145,000.<br>Occupants to date include dentists, lawyers, and engineers.<br>Agent--Barkely-Fraser |
| B(1) | "DILL PROPERTY"<br>(portion)<br>Grimball and Folly Roads<br>City of Charleston<br>James Island<br>Joe Griffith - broker<br>Jim Irvin - Charleston | ***PUD***<br>***Residential Planned Community*** | 390 acres<br>potential for 1,300 units<br>likely: 800 units | n/a | Planned | 1993+ | Potential planned residential community including both single family and multifamily development, possibly rental units as well. Considering a golf course.<br>Jim Irvin is negotiating contract to purchase site.<br>Development and timing will depend on opportunity to secure development financing. Property includes 310 acres of useable land. Remainder will be preserved.<br>Contract on property is for $4.4 million ($11,282/acre) |
| B(2) | "DILL PROPERTY"<br>(portion)<br>Grimball and Folly Roads<br>City of Charleston<br>James Island<br>Joe Griffith - broker<br>Irvin-Temple Associates | ***Commercial Retail Strip Center***<br>(Columbia) | 23 acres | n/a | Planned | 1993+ | Strip center with K-Mart as the anchor is planned.<br>Property has frontage on Folly Road. Contract for land is at $90,000 an acre.<br>Property is to have closed at end of month. Timing will depend on availability of financing. |
| C | NO NAME<br>Dill's Bluff Road/<br>James Island<br>Charleston County<br>Simpson & Moore - broker | ***Residential Acreage For Sale*** | 2.17 acres<br>(undeveloped) | RM 2 - MF | Approved/ Property for Sale | n/a | Approved for up to 53 multifamily units.<br>Property is the only undeveloped portion of a larger parcel.<br>Acreage has been on the market for over 2 years at $185,000.<br>Agent--Simpson & Moore |
| D | MARINA VILLAGE @ RIPLEY LIGHT<br>Merritt Rd./Albemarle Point<br>Charleston County<br>contact: Bob Glover | ***Mixed Use*** | 25 acres<br>(cost--<br>$550,000/acre) | General Business/ MF | Not Approved; Not financed. | UNK. | Tentative Phase I plans for 78,000 sq. ft. of office/retail space with third-floor condominiums.<br>Currently looking for investors; need construction loan before pre-leasing can begin. Office/retail space will lease for $21-$22 per square foot.<br>Other ideas for development include 2-story "mini-mall" (approx. 100,000 sq. ft.) with a 400-450 room hotel, and possible plans for a sports and fitness complex. |

Source: Robert Charles Lesser & Co.

p&p

**EXHIBIT 14**
**SUMMARY OF PLANNED AND PROPOSED RESIDENTIAL AND COMMERCIAL PROJECTS**
**IN THE CMA**
**CHARLESTON COUNTY, SOUTH CAROLINA**

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| MAP KEY | PROJECT Location County Contact/Developer | *PRODUCT TYPE* | ACREAGE/ LOTS/ UNITS | ZONING | STATUS | 1/ ANTICIPATED DELIVERY | 2/ COMMENTS |
|---|---|---|---|---|---|---|---|
| E | NO NAME<br>Albemarle Road<br>James Island<br>Joe Griffith - broker | ***Commercial/ Mixed Use*** | 20 acres | Commercial | Property For Sale | 1993+ | Asking $500,000 per acre for property. Property has water frontage and views of Ashley River and downtown Charleston. |
| F | NO NAME<br>Maybank Hwy and Fleming Road<br>(former McLeod property)<br>contact: Read & Read Realtors | ***Residential/ Mixed Use*** | 17 acres | Single Family Property For Sale (5-9 du/ac) currently | | n/a | Appraised at $25,000+/- per acre. Site could be divided to include commercial acreage along Maybank Hwy with residential at rear of site. |

Source: Robert Charles Lesser & Co.

**EXHIBIT 15**
**ANNUAL DEMAND POTENTIAL FOR DETACHED HOUSING**
**McLEOD PLANTATION SITE, JAMES ISLAND, SOUTH CAROLINA**
**BASED ON 1990-1995 DEMOGRAPHIC TRENDS**



| | | Home Price: | $60,000<br>$80,000 | $80,000<br>$100,000 | $100,000<br>$150,000 | $150,000<br>$200,000 | $200,000<br>$300,000 | |
|---|---|---|---|---|---|---|---|---|
| | | Income: /1 | $25,000<br>$35,000 | $35,000<br>$45,000 | $45,000<br>$65,000 | $65,000<br>$85,000 | $85,000<br>+ | |
| **SOURCES OF DEMAND** | | | | | | | | Total |
| **New Household Growth, 1990-95** | | | | | | | | |
| Total Annual New Households, Charleston MSA /2 | | | 3,684 | 3,684 | 3,684 | 3,684 | 3,684 | |
| x Income Qualified /3 | | | 16% | 13% | 14% | 5% | 3% | |
| = Income Qualified | | | 589 | 472 | 504 | 184 | 111 | |
| x Owner Propensity /3 | | | 50% | 60% | 70% | 80% | 90% | |
| = Qualified New Households | | | 295 | 283 | 353 | 147 | 99 | |
| x Active Market Factor /4 | | | 23% | 25% | 26% | 28% | 28% | |
| Subtotal, from New Household Growth | | | 68 | 71 | 92 | 41 | 28 | 299 |
| **Existing Owner Household Annual Turnover** | | | | | | | | |
| Total Owner Households, Charleston MSA, 1989 /2 | | | 102,000 | 102,000 | 102,000 | 102,000 | 102,000 | |
| x Income Qualified /3 | | | 17% | 14% | 16% | 8% | 3% | |
| = Income Qualified | | | 16,830 | 14,586 | 16,014 | 7,997 | 3,366 | |
| x Annual Turnover Rate /3 | | | 13% | 12% | 10% | 9% | 8% | |
| = Qualified Owners in Turnover | | | 2,188 | 1,750 | 1,601 | 720 | 269 | |
| x Active Market Factor /4 | | | 33% | 35% | 38% | 40% | 40% | |
| Subtotal, from Owner Turnover | | | 722 | 613 | 609 | 288 | 108 | 2,339 |
| **Existing Renter Household Annual Turnover** | | | | | | | | |
| Total Renter Households, Charleston MSA, 1989 /2 | | | 73,000 | 73,000 | 73,000 | 73,000 | 73,000 | |
| x Income Qualified /3 | | | 15% | 10% | 8% | 3% | 1% | |
| = Income Qualified | | | 11,242 | 7,118 | 6,023 | 2,365 | 730 | |
| x Annual Turnover Rate /3 | | | 40% | 40% | 40% | 40% | 40% | |
| = Qualified Renters in Turnover | | | 4,497 | 2,847 | 2,409 | 946 | 292 | |
| x Active Market Factor /4 | | | 8% | 9% | 9% | 10% | 10% | |
| Subtotal, from Renter Turnover | | | 360 | 256 | 217 | 95 | 29 | 957 |
| **TOTAL ANNUAL POTENTIAL DEMAND:** | | | 1,150 | 940 | 917 | 424 | 165 | 3,595 |
| **CHARLESTON COUNTY CAPTURE: 5/** | **55%** | | 632 | 517 | 504 | 233 | 91 | 1,977 |
| **JAMES ISLAND AND CMA CAPTURE: 5/** | | | 18% | 18% | 20% | 20% | 20% | 19% |
| | | | 114 | 93 | 101 | 47 | 18 | 372 |
| **SUBJECT SITE CAPTURE: 6/** | | | 25% | 20% | 20% | 25% | 25% | 22% |
| | | | 28 | 19 | 20 | 12 | 5 | 83 |
| | | | 2.4 | 1.6 | 1.7 | 1.0 | 0.4 | 7.0 |

NOTES:

1/ Affordability based on 10.5% interest rate, 10% average down payment, and 30 year term.
2/ Charleston MSA demographics
3/ Charleston MSA Metropolitan Housing Characteristics, US Census
4/ RCLCo. estimate from alternatives in the market, market segmentation, and market activity.
5/ Based on captures of new household growth projections, building permit activity, and income distributions.
6/ Subject Site Capture is based on location in the market, and competitive alternatives by price range.

SOURCE: ROBERT CHARLES LESSER & CO.

**EXHIBIT 16**
**ANNUAL DEMAND POTENTIAL FOR ATTACHED HOUSING**
**McLEOD PLANTATION SITE, JAMES ISLAND, SOUTH CAROLINA**
**BASED ON 1990-1995 DEMOGRAPHIC TRENDS**

| | | Home Price: | $60,000<br>$80,000 | $80,000<br>$100,000 | $100,000<br>$150,000 | $150,000<br>$200,000 | $200,000<br>$300,000 | |
|---|---|---|---|---|---|---|---|---|
| | | Income: /1 | $25,000<br>$35,000 | $35,000<br>$45,000 | $45,000<br>$65,000 | $65,000<br>$85,000 | $85,000<br>+ | |
| **SOURCES OF DEMAND** | | | | | | | | Total |
| **New Household Growth, 1990-95** | | | | | | | | |
| Total Annual New Households, Charleston MSA /2 | | | 3,684 | 3,684 | 3,684 | 3,684 | 3,684 | |
| x Income Qualified /3 | | | 16% | 13% | 14% | 5% | 3% | |
| = Income Qualified | | | 589 | 472 | 504 | 184 | 111 | |
| x Owner Propensity /3 | | | 50% | 60% | 70% | 80% | 90% | |
| = Qualified New Households | | | 295 | 283 | 353 | 147 | 99 | |
| x Active Market Factor /4 | | | 12% | 11% | 9% | 7% | 7% | |
| Subtotal, from New Household Growth | | | 35 | 31 | 32 | 10 | 7 | 115 |
| **Existing Owner Household Annual Turnover** | | | | | | | | |
| Total Owner Households, Charleston MSA, 1989 /2 | | | 102,000 | 102,000 | 102,000 | 102,000 | 102,000 | |
| x Income Qualified /3 | | | 17% | 14% | 16% | 8% | 3% | |
| = Income Qualified | | | 16,830 | 14,586 | 16,014 | 7,997 | 3,366 | |
| x Annual Turnover Rate /3 | | | 13% | 12% | 10% | 9% | 8% | |
| = Qualified Owners in Turnover | | | 2,188 | 1,750 | 1,601 | 720 | 269 | |
| x Active Market Factor /4 | | | 18% | 15% | 13% | 10% | 10% | |
| Subtotal, from Owner Turnover | | | 394 | 263 | 208 | 72 | 27 | 963 |
| **Existing Renter Household Annual Turnover** | | | | | | | | |
| Total Renter Households, Charleston MSA, 1989 /2 | | | 73,000 | 73,000 | 73,000 | 73,000 | 73,000 | |
| x Income Qualified /3 | | | 15% | 10% | 8% | 3% | 1% | |
| = Income Qualified | | | 11,242 | 7,118 | 6,023 | 2,365 | 730 | |
| x Annual Turnover Rate /3 | | | 40% | 40% | 40% | 40% | 40% | |
| = Qualified Renters in Turnover | | | 4,497 | 2,847 | 2,409 | 946 | 292 | |
| x Active Market Factor /4 | | | 4% | 4% | 3% | 3% | 3% | |
| Subtotal, from Renter Turnover | | | 180 | 114 | 72 | 28 | 9 | 403 |
| **TOTAL ANNUAL POTENTIAL DEMAND:** | | | 609 | 408 | 312 | 111 | 43 | 1,482 |
| **CHARLESTON COUNTY CAPTURE: 5/** | **55%** | | 335 | 224 | 172 | 61 | 23 | 815 |
| **JAMES ISLAND AND CMA CAPTURE: 5/** | | | 18% | 18% | 20% | 20% | 20% | 18% |
| | | | 60 | 40 | 31 | 11 | 4 | 147 |
| **SUBJECT SITE CAPTURE: 6/** | | | 30% | 30% | 30% | 30% | 30% | 30% |
| | | | 18 | 12 | 9 | 3 | 1 | 44 |
| | | | 1.5 | 1.0 | 0.8 | 0.3 | 0.1 | 3.7 |

NOTES:

1/ Affordability based on 9.5% interest rate, 10% average down payment, and 30 year term.
2/ Charleston MSA demographics
3/ Charleston MSA Metropolitan Housing Characteristics, US Census
4/ RCLCo. estimate from alternatives in the market, market segmentation, and market activity.
5/ Based on captures of new household growth projections, building permit activity, and income distributions.
6/ Subject Site Capture is based on location in the market, and competitive alternatives by price range.

SOURCE: ROBERT CHARLES LESSER & CO.

price/demand

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**EXHIBIT 17**
**ANNUAL DEMAND POTENTIAL FOR RENTAL UNITS**
**McLEOD PLANTATION SITE, JAMES ISLAND, SOUTH CAROLINA**
**BASED ON 1990-1995 DEMOGRAPHIC TRENDS**

| | | |
|---|---|---|
| | Rents: | $350 – $750 |
| | Income: /1 | $15,000 – $45,000 |
| **SOURCES OF DEMAND** | | |
| **New Household Growth, 1990-95** | | |
| Total Annual New Households, Charleston MSA /2 | | 3,684 |
| x Income Qualified /3 | | 49% |
| = Income Qualified | | 1,805 |
| x Owner Propensity /3 | | 49% |
| = Qualified New Households | | 885 |
| x Active Market Factor /4 | | 35% |
| Subtotal, from New Households Growth | | 310 |
| **Existing Renter Household Annual Turnover** | | |
| Total Renter Households, Charleston MSA, 1989 /2 | | 73,000 |
| x Income Qualified /3 | | 59% |
| = Income Qualified | | 43,070 |
| x Annual Turnover Rate /3 | | 40% |
| = Qualified Renters in Turnover | | 17,228 |
| x Active Market Factor /4 | | 10% |
| Subtotal, from Renter Turnover | | 1,723 |
| **TOTAL ANNUAL POTENTIAL DEMAND:** | | 2,032 |
| **CHARLESTON COUNTY CAPTURE: 5/** | **65%** | 1,321 |
| **JAMES ISLAND AND CMA CAPTURE: 5/** | | 20% – 264 |
| **SUBJECT SITE CAPTURE: 6/** | | 50% – 132 – 11.0 |

NOTES:

1/ Affordability based on 28% qualificaiton.
2/ Charleston MSA demographics
3/ Charleston MSA Metropolitan Housing Characteristics, US Census
4/ RCLCo. estimate from alternatives in the market, market segmentation, and market activity.
5/ Based on captures of new household growth projections, building permit activity, and income distributions.
6/ Subject Site Capture is based on location in the market, and competitive alternatives by price range.

SOURCE: ROBERT CHARLES LESSER & CO.

**EXHIBIT 18**
**MARKET RESEARCH FINDINGS**
**REGARDING McLEOD PLANTATION SITE**
**JAMES ISLAND, SOUTH CAROLINA**

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**DEMOGRAPHICS**

James Island population is approximately 28,717 as of 1990, representing 10% of Charleston County population.
The defined CMA, including all of James Island and portions of West Ashley, has a population of approximately 72,350.
Both the CMA and James Island are projected to remainly fairly stable over the next five year period adding 200 and 100 new households annually (respectively.)
James Island Bridge, connecting downtown Charleston with James Island at Harborview Road, is projected to open in late 1992, early 1993. Improved access to and from the island will encourage increased development activity.
The Charleston MSA is projected to add over 3,600 new households each year through 1995, bringing the MSA population to over 525,000 by 1995.
Age distributions in CMA show a strong family orientation, with over 36% of the population between the ages of 25 and 44.
Based on projected household growth figures, it appears that employment figures may be somewhat exaggerated.
Employment projections indicate a growing economy with over 7,500 new jobs to be added each year through 1995.
Most of the new growth will be within the services sector, over 2,000 new jobs annually.

**RESIDENTIAL REAL ESTATE MARKET**

SINGLE FAMILY:
Sales of single family homes have slowed recently within Charleston, a trend demonstrated throughout the Southeast due to hesitation concerning local and national economy.
Surveys included independent subdivisions located on James Island and within CMA as well as active subdivisions located in the Shadowmoss planned community.
Homes ranging in price from the $70,000's to over $200,000's were identified. Homes or properties featuring water frontage and/or access command the highest premiums within the market. Projects featuring golf frontage also capture premiums for view locations.
The lowest priced homes (homes priced under $100,000) are currently achieving the highest absorptions in the market, averaging 2 to 2.5 sales per month. The move-up and luxury market has averaged approximately one sale per month among surveyed properties.
Recent development on James Island has been concentrated primarily in small pockets of activity throughout the Island - none offer the visibility or access associated with the subject property.

MULTIFAMILY:
Two active multifamily projects were identified within the markets.
Historical sales performances have been moderate to slow, averaging .5 sales per month.
Majority of buyers have been older couples and empty nesters.
Both projects are amenity oriented featuring water or marsh views.

RENTAL:
Six rental properties were identified on James Island . All projects feature strong occupancies, averaging 99% overall.
Renters include a mix of retirees/senior citizens and young students, singles, and couples.
Rents are in the $300 to $500 range.

**COMMERCIAL REAL ESTATE MARKET**

Select retail and office properties within close proximity to the subject site were identified and surveyed.
Occupancies among retail centers are high, averaging 95%.
Rates range from $7 to $9 per square foot, with concessions averaging approximately one month free on a three year lease.

**PLANNED AND PROPOSED PROJECTS**

The largest planned project identified within the CMA is the "Dill property" located south of McLeod Plantation at Folly and Grimball Roads.
The site will include a commercial and residential component.

SOURCE: Robert Charles Lesser & Co.

# 6.0 Development Options: Layout

**Jaeger**
**Pyburn**
Planning
Architecture
Historic Preservation
Landscape Architecture

# 6.0 Development Options: Layout

Maps 9 -12 present four options for development on the areas noted in the secondary and tertiary preservation zones. The layouts presented reflect setback requirements from the City of Charleston. A fifth option, not illustrated, is also described.

## 6.1 Parcel One/Option One

Map 9 illustrates a development option for the approximate five acre tract, situated immediately south of Country Club Drive at the eastern boundary of the site. This tract is adjacent to the golf course of the Charleston Country Club.

Sixteen lots have been created at approximately 9,000 square feet each. This is the minimum lot size allowed under the current SF-I zoning classification for this site. Approximately one-half of these lots would have golf course views. In this option, the open vista to the golf course is an important selling point. Discussions with the executive board of the Charleston Country Club would be necessary to insure the retention of these views.

A major drawback in this scheme is the requirement to relocate the identified wetland zone. A 1.2 acre wetland (twice the existing .6 acre wetland) would need to be recreated within the site. An exact location for the "new wetland" has not been determined.

## 6.2 Parcel One/Option Two

Map 10 illustrates a second option for the five acre site, south of Country Club Drive. In this scheme four estate-sized lots, ranging from .8 acres to over two acres, have been created. All of these lots offer golf course views. It is again suggested that arrangements be made with officials from the Charleston Country Club to insure golf course views.

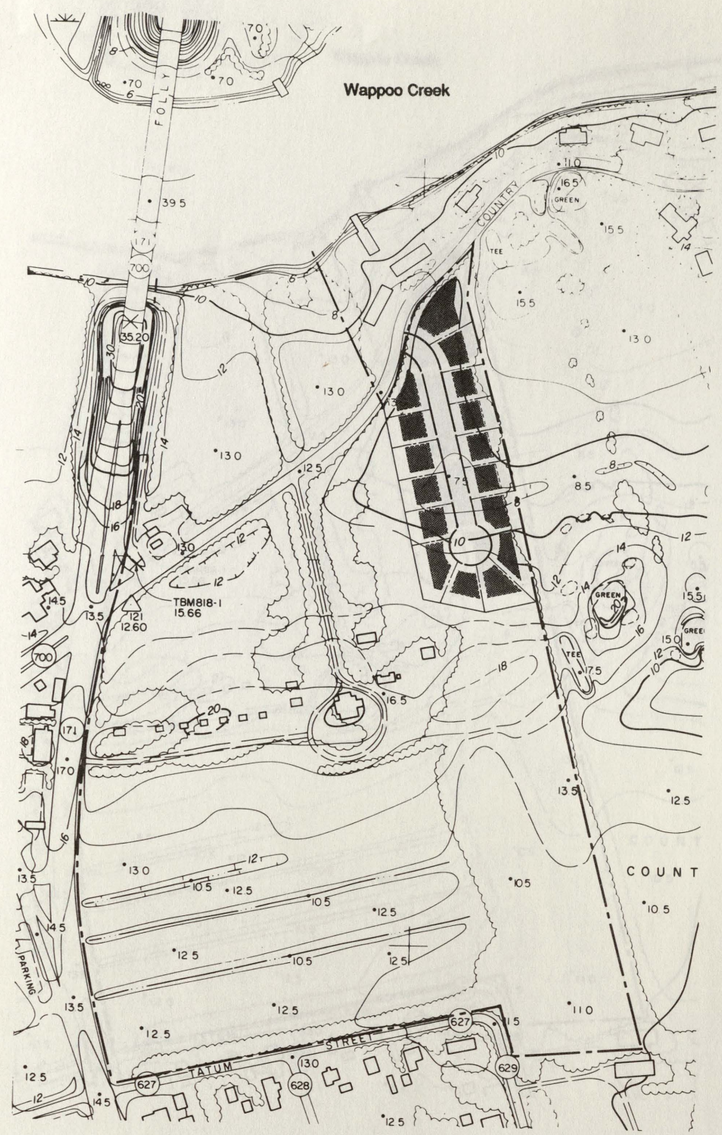
An important benefit in this scheme is the preservation of the wetlands. The wetlands have been made a part of two of the lots. There is still space within these lots to construct a residence and parking area outside the wetland zone.

## 6.3 Parcel Two/Option One

Map 12 illustrates a single family layout on the approximate 16 acres in parcel two. This layout, using minimum-sized lots (9,000 sf), yields 52 lots. Access at two points is from Tatum Streets.

## 6.4 Parcel Two/Option Two

The Planned Unit Development (PUD) zoning classification offers a third option to explore on the parcel two site. PUD is defined by the City of Charleston as "a




# Development Options

*Parcel One*
*Option One*

**MAP 9**

0 25 50 75 100 150 200 300
Scale in Feet

North

## *McLeod Plantation*

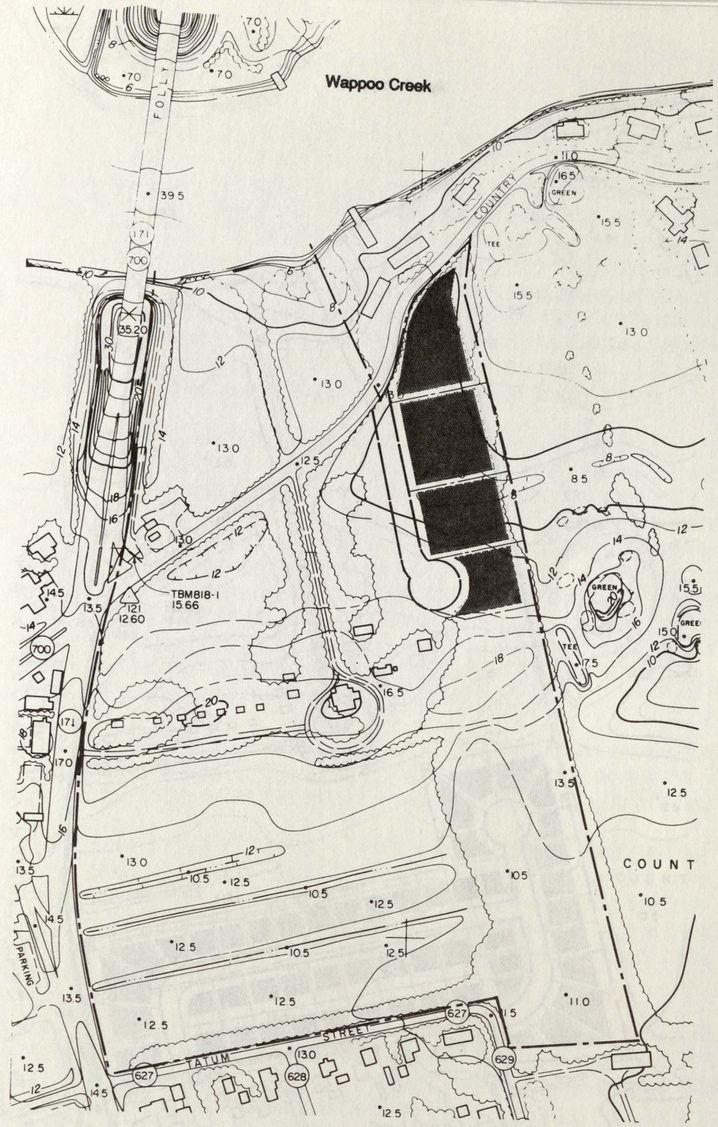
*James Island, South Carolina*

*Historic Charleston Foundation*
*Charleston, South Carolina*


JAEGER PYBURN
Planning
Architecture
Historic Preservation
Landscape Architecture
119 Washington Street
Gainesville, Georgia 30501 404/534-7024

NEW SOUTH ASSOCIATES
Archeology

ROBERT CHARLES LESSER
Real Estate Analysis




# Development Options

*Parcel One*
*Option Two*

**MAP 10**

Scale in Feet

North

# *McLeod Plantation*

*James Island, South Carolina*

*Historic Charleston Foundation*
*Charleston, South Carolina*

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NEW SOUTH ASSOCIATES
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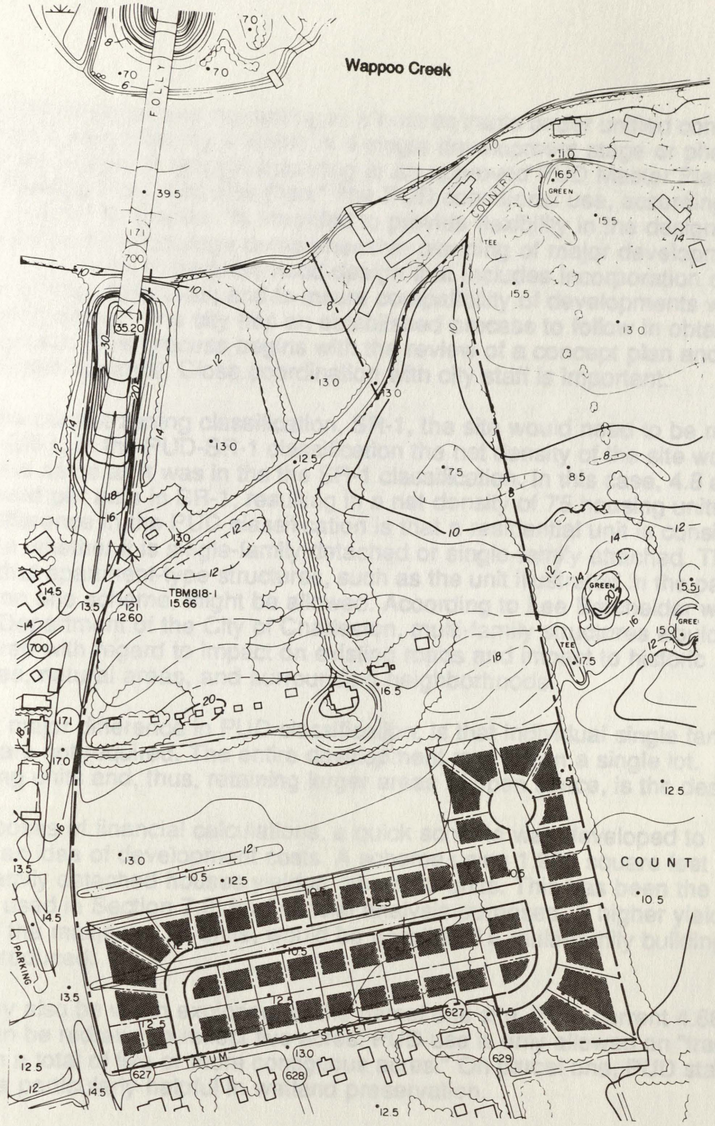
ROBERT CHARLES LESSER
Real Estate Analysts




# Development Options

*Parcel Two*
*Option One*

**MAP 11**

Scale in Feet: 0 25 50 75 100 150 200 300

North

# *McLeod Plantation*

*James Island, South Carolina*

*Historic Charleston Foundation*
*Charleston, South Carolina*


JAEGER PYBURN

Planning
Architecture
Historic Preservation
Landscape Architecture

119 Washington Street
Gainesville, Georgia 30501 404/534-7024

NEW SOUTH ASSOCIATES
Archeology

ROBERT CHARLES LESSER
Real Estate Analysis

planned unit development consisting of a tract or tracts under unified control, planned and developed as a whole in a single development stage or phased series of development stages according to an approved PUD Master Plan, Master Phasing Plan, and Site Plan." The PUD conditional use, according to the recently passed ordinance, "is intended to provide flexibility in the design of developments; to encourage comprehensive planning of major developments; to permit innovation in neighborhood design that includes incorporation of open space and other amenities; and to insure compatibility of developments with surrounding areas." The city has an established process to follow in obtaining PUD approval. This process begins with the review of a concept plan and ends with final plat approval. Close coordination with city staff is important.

Under the current zoning classification, SR-1, the site would need to be rezoned to PUD-SR-1. In the PUD-SR-1 classification the net density of the site would remain the same as it was in the the SR-1 classification. In this case, 4.8 acres are allowed per acre in SR-1, resulting in a net density of 75 housing units. A major difference in the PUD classification is that a residential unit is considered the same whether it is single-family detached or single-family attached. This means that apartment-type structures, such as the unit illustrated in the parcel two/option one scheme, might be allowed. According to Lee Batchelder with the Zoning Department of the City of Charleston, multi-family structures would be considered with regard to impact on existing roads and impact to historic resources, natural areas, and surrounding neighborhoods.

Another major difference in PUD classification, is that individual single family lot layouts are not required. The entire development may be on a single lot. Clustering units and, thus, retaining larger areas of open space, is the desire.

For purposes of financial calculations, a quick scheme was developed to provide an idea of development costs. A scheme using 1,900 square feet single-family detached houses yielded about 65 units. This has been the number used in Section 7.0. for financial analysis purposes. A higher yield, possibly the maximum 75 units, would be possible if a multi-family building were introduced.

PUD may also be worth exploring for the parcel one site, if the current 4.86 acres can be redrawn to reflect five acres. PUD use is only allowed on "tracts of land with a total of five or more contiguous acres." On parcel one, PUD status would be particularly helpful in wetland preservation.

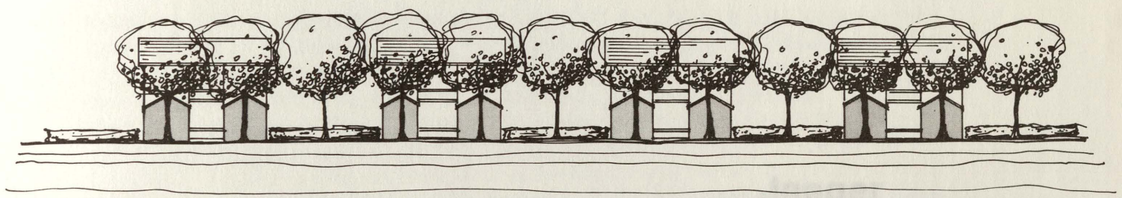
A PUD approach appears to offer a variety of development schemes at McLeod for both parcels. A PUD approach at McLeod offers the opportunity to be a model for others in the city to follow. The city has had a PUD classification for a number of years. Changes made to the ordinance as recent as June 11, 1991, have added to the flexibility of this approach. The city is likely interested in model examples of PUD developments. McLeod's historic and natural elements in a highly visible location make this site particularly appropriate for this approach.

### 6.4.1 Design Recommendations

As noted in Section 4: Preservation Boundary, design is a major consideration on this development tract. Compatibility of design and the opportunity for interpretation are the goals. A gridiron pattern would be the most compatible layout from both a visual and historical perspective and might be considered if a clustered approach is followed. Historic associations reinforce a regimented development pattern on the McLeod site.

As noted in the archeological evaluation, settlement patterns from the seventeenth-, eighteenth, and nineteenth-centuries occurred in a linear fashion along the ridge. The existing arrangement of the slave row cottages and the Slave Drive Allee and its relationship to the plantation house express an axial layout. Cultivation of the agricultural fields also followed this pattern. The Landing Drive Allee and the remnant of the Lightwood Allee extend at right angles to this east-west axis. Even the agricultural tile drainage system responds to the site's grid. It is assumed that the ephemeral freedmen village did likewise, since more permanent freedmen developments document a common use of the grid layout.

A grid layout has the potential to create a compatible edge between the development site and the McLeod Plantation. Individual buildings could be placed in a regimented alignment, facing the McLeod plantation house, in much the same way the freedmen village may have responded. A row of shade trees centered on the structures would be a method of buffering the dwellings. The potential view from the McLeod site would be a regimented row of low-rise structures situated behind a row of strategically-placed trees. Map/Illustration 12 is a graphic depiction of how the edge of the PUD development might look from the vantage point of the plantation house.



*View of PUD Development From Plantation House*

## Development Options

*Parcel Two*
*Option Two*

**Map/Illistration 12**

# 7.0 Development Options: Financial Analysis



**Jaeger**
**Pyburn**

Planning
Architecture
Historic Preservation
Landscape Architecture

# 7.0 Development Options: Financial Analysis

The objective of this portion of the report is to evaluate the potential land value associated with each of the development scenarios presented in the previous chapter. Based on the market research, potential residential uses have been suggested for each of the land parcels identified as potential development sites (parcels located outside the preservation boundary zone). These parcels include two sites: (1) Parcel One: a 4.5 to 4.9 acre site on the northeastern portion of the property adjacent to the Country Club of Charleston golf course; and (2) Parcel Two: a 15.8 acre site on the south end of the site (a portion of the existing agricultural field) adjacent to Tatum Street.

Suggested residential options for each developable parcel are summarized on Exhibit 19. Options were determined based on our market research as well as potential land uses identified by Jaeger/Pyburn.

Options for Parcel One include the development of 16 9,000 square foot lots or four large lot estates. To develop the 9,000 square foot lots, the current wetlands within the site will need to be removed and replaced at another location.The wetlands can remain if development of the large lot estates is selected. Suggested pricing for the 9,000 square foot lots includes developed lot prices ranging from $45,000 to $55,000, with homes ranging in price from $175,000 to $250,000. For the large lot estates, anticipated lot prices averaged $80,000 with custom homes priced from $250,000 and up.

For Parcel Two, suggested options include 52 9,000 square foot single family homes; or 65 single family homes using a cluster layout and following the city's PUD standards. Single family homes on this parcel are likely to be lower priced due to their orientation to the more moderately priced Tatum Street neighborhood. We anticipate home prices from $130,000 to $160,000 with developed lot prices selling for $30,000 to $35,000.

We have prepared financial models for each of the proposed products in order to determine the financial feasibility of each, given the proposed development program and the required infrastructure and improvements. The models anticipate what fee a builder/developer would be willing to pay for the land in order to develop the proposed product. The purpose of this exercise is to provide Historic Charleston Foundation with an understanding of achievable land values for the site based on the development alternatives for the property. These models are included at the end of this section.

The methodology employs computer cash-flow models to analyze the pre-tax internal rate of return for each option. The revenue data for the models is based

on the findings and conclusions from our market analysis. Cost estimates were provided by Jaeger/Pyburn. The resulting land values are estimates of the land values each product type will yield given a reasonable rate of return for the builder. Prospective purchasers will evaluate total land price as well as the achievable rate of return in selecting a site for development. Given current market conditions, an acceptable net rate of return is generally considered to be approximately 9% to 10% or greater. When contingencies and overhead allocations are added, gross margins are closer to a 20% average. Our models indicate that the proposed development programs for each parcel would be considered a financially feasible program for a developer/builder. A summary of each option is provided below and on Exhibit 20.

| PRODUCT TYPE | LAND VALUE /ACRE(000) | POTENTIAL SALES REVENUE |
|---|---|---|
| PARCEL 1: | | |
| Small Lot Single Family: 9,000 sq.ft. lots | $9.0 | $44,100 |
| Large Lot Single Family: .8-2.2 acre lots | $10.0 | $45,000 |
| PARCEL 2: | | |
| Small Lot Single Family: 9,000 sq.ft. lots | $9.0 | $142,200 |
| Cluster Small Lot Single Family | $15.0 | $237,000 |

These are baseline achievable land values for the property. Our research of other land transactions within the site's competitive market area suggests that values may be be as high as $11,000 per acre for single family development. The ability to achieve this value for the property will depend on the individual builder's willingness to pay as well as anticipated home construction costs and product.

Based on our analyses, there is little differentiation among values for either option for Parcel One of the property. Development of small lot single family lots will yield approximately $44,100 as compared to $45,000 in potential revenues for development of the large lot estates. Historic Charleston may want to consider the issue of removing or replacing a portion of the wetlands as a part of the decision in choosing among these two alternatives.

In contrast, options for Parcel Two of the property provide differences in potential land revenues. Development of single family lots will generate $142,200 or $237,000 in revenues, depending on the lot layout.

It is apparent based on the research of all team members that the site has excellent potential for development of a cultural and educational facility. The development of parcels outside the preservation boundaries offer the potential to generate revenues to create such a facility. Each of the options carries along with it certain advantages and disadvantages, and each should be considered thoroughly, relative to the objectives of Historic Charleston Foundation before pursuing development of the site.

**EXHIBIT 19**
**ALTERNATIVE DEVELOPMENT SCENARIOS**
**FOR McLEOD PLANTATION PROPERTY**
**JAMES ISLAND, SOUTH CAROLINA**

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**PARCEL 1 (near Country Club of Charleston)**

| OPTION | PRODUCT TYPE | LOT SIZE RANGE | DEVELOPED LOT PRICE RANGE | HOME PRICE RANGE | NO. ACRES | NO. UNITS | ESTIMATED ABSORPTION (ANNUAL) | YEARS TO BUILD-OUT |
|---|---|---|---|---|---|---|---|---|
| 1 | Small Lot Single Family (remove wetlands) | 9,000 - 9,000 | $45,000 - $55,000 | $175,000 - $250,000 | 4.9 | 16 | 8-10 | 1.6-2 |
| 2 | Large Lot Sales for Custom Single Family Homes | .8 acre - 2.1 acres | $80,000 - $80,000 | $250,000 - $350,000 | 4.5 | 4 | 4 | 1.0 |

**PARCEL 2 (near Tatum Street)**

| OPTION | PRODUCT TYPE | LOT SIZE RANGE | DEVELOPED LOT PRICE RANGE | HOME PRICE RANGE | NO. ACRES | NO. UNITS | ESTIMATED ABSORPTION (ANNUAL) | YEARS TO BUILD-OUT |
|---|---|---|---|---|---|---|---|---|
| 1 | Small Lot Single Family | 9,000 - 9,000 | $30,000 - $35,000 | $130,000 - $160,000 | 15.8 | 52 | 16 | 3.3 |

NOTE: Estimated number of units based on Jaeger/Pyburn lay-out.

SOURCE: Robert Charles Lesser & Co.

**EXHIBIT 20**
**SUMMARY OF FINANCIAL ALTERNATIVES**
**FOR McLEOD PLANTATION PROPERTY**
**JAMES ISLAND, SOUTH CAROLINA**

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**PARCEL 1 (near Country Club of Charleston)**

| OPTION | PRODUCT TYPE | LOT SIZE RANGE | DEVELOPED HOME PRICE RANGE | NO. ACRES | NO. UNITS | SELLABLE PRICE PER ACRE | POTENTIAL SALES REVENUE |
|---|---|---|---|---|---|---|---|
| 1 | Small Lot Single Family (remove wetlands) | 9,000 - 9,000 | $175,000 - $250,000 | 4.9 | 16 | $9,000 | $44,100 |
| 2 | Large Lot Sales for Custom Single Family Homes | .8 acre - 2.1 acres | $250,000 - $350,000 | 4.5 | 4 | $10,000 | $45,000 |

**PARCEL 2 (near Tatum Street)**

| OPTION | PRODUCT TYPE | LOT SIZE RANGE | HOME PRICE RANGE | NO. ACRES | NO. UNITS | SELLABLE PRICE PER ACRE | POTENTIAL SALES REVENUE |
|---|---|---|---|---|---|---|---|
| 1 | Small Lot Single Family | 9,000 - 9,000 | $130,000 - $160,000 | 15.8 | 52 | $9,000 | $142,200 |
| 2 | PUD Single Family | n/a n/a | $130,000 - $160,000 | 15.8 | 75 | $15,000 | $237,000 |

NOTE: Estimated number of units based on Jaeger/Pyburn lay-out.

SOURCE: Robert Charles Lesser & Co.

**PARCEL 1 - OPTION 1**

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**EXHIBIT F-1**

**SINGLE FAMILY HOUSING DEVELOPMENT**
**$175,000 to $250,000 Price Range**
**$212,500 Average Home Price/ $50,000 Average Lot Price**

| | TOTAL | YEARS 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **CLOSINGS** | 16 | 10 | 6 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **SALES REVENUES (1)** (Constant Dollars) | $3,400 | $2,125 | $1,275 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| **TOTAL REVENUES (2)** (Current Dollars) | $3,464 | $2,125 | $1,339 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Average unit prices in thousands** $212.5 per unit $50.0 per lot

| | | |
|---|---|---|
| **Total Acres** | 4.9 | $56.35 (Acquisition Cost, 000) |
| **Total Lots** | 16 | $3.52 (Per Lot Cost, 000) |
| **Units/Acre (GROSS)** | 3.3 | $11.50 (Per Acre, 000) |

**(2) Revenue escalation rate:** 5%

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 1 - OPTION 1**
**EXHIBIT F-2**
**PROJECTED COSTS**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$175,000 to $250,000 Price Range**
**(In thousands of dollars)**

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| | | YEARS | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | TOTAL | 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
| **DIRECT CONSTRUCTION (1)** | $2,260 | $1,412 | $847 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| Infrastructure | $204 | $204 | $0 | | | | | | | | |
| **INDIRECT COSTS (2)** | $517 | $339 | $178 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| **CONSTRUCTION FINANCING (3)** | $134 | $88 | $46 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL COSTS (Constant Dollars) | $3,320 | $2,248 | $1,071 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL COSTS (Current Dollars) | $3,373 | $2,248 | $1,125 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Direct cost assumptions: (excludes land: 000)**

| | Unit Size (SF) | Cost/SF | Unit Cost |
|---|---|---|---|
| Single Family Homes | 2,435 | $58.0 | $141.2 |
| Infrastructure | | | $204.3 |
| Subtotal | | | $204.3 |
| Cost Escalation Rate: | 5% | | |

**(2) Indirect cost assumptions:**

| | Pct. | Variable |
|---|---|---|
| Marketing | 1.5% | Res Sales |
| Insurance | 1.5% | Res Sales |
| Sales Comm | 5.0% | Res Sales |
| Subtotal | 8.0% | Res Sales |
| G&A | 5.0% | Dir Costs |
| Engr./Des. | 3.0% | Dir Costs |
| Contingency | 5.0% | Dir Costs |
| Subtotal | 13.0% | Dir Costs |

**(3) Construction Financing:**

| | |
|---|---|
| Loan Fees: | 2.0% |
| Interest Rate: | 10.0% |
| Period (Build and sell per unit, in months) | 6 |
| Even Draw | 0.5 |
| Effective Rate | 4.5% |

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 1 - OPTION 1**
**EXHIBIT F-3**
**PROJECTED CASH FLOW**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$175,000 to $250,000 Price Range**
**(In thousands of dollars)**

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| | | YEARS | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **PROJECT CASH FLOW** | TOTAL | 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
| Less: Land Acquisition | ($56) | ($56) | | | | | | | | | |
| Total Sales Proceeds | $3,464 | $2,125 | $1,339 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| Less: Direct and Indirect Costs | ($3,373) | ($2,248) | ($1,125) | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| **PROGRAM CASH FLOW** | $34 | ($180) | $214 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

**LAND RESIDUAL**

| Net Present Value | |
|---|---|
| 0% | $34 |
| 10% | $13 |
| 15% | $5 |
| 20% | ($1) |
| 25% | ($7) |

**INTERNAL RATE OF RETURN** 18.98%

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

PARCEL 1- OPTION 2

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EXHIBIT F-1

SINGLE FAMILY HOUSING DEVELOPMENT
$250,000 to $350,000 Price Range
$300,000 Average Home Price/ $80,000 Average Lot Price

| | TOTAL | YEARS 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **CLOSINGS** | 4 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **SALES REVENUES (1)** (Constant Dollars) | $320 | $320 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL REVENUES (2) (Current Dollars) | $320 | $320 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Average unit prices in thousands** $80.0 per lot

| | | | |
|---|---|---|---|
| **Total Acres** | 4.5 | $45.00 | (Acquisition Cost, 000) |
| **Total Lots** | 4 | $11.25 | (Per Lot Cost, 000) |
| **Units/Acre (GROSS)** | 0.9 | $10.00 | (Per Acre, 000) |

**(2) Revenue escalation rate:** 5%

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 1- OPTION 2**
**EXHIBIT F-2**
**PROJECTED COSTS**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$250,000 to $350,000 Price Range**
**(in thousands of dollars)**

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| | | YEARS | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | TOTAL | 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
| **DIRECT CONSTRUCTION (1)** | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| Infrastructure | $98 | $98 | $0 | | | | | | | | |
| **INDIRECT COSTS (2)** | $13 | $13 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| **CONSTRUCTION FINANCING (3)** | $5 | $5 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL COSTS (Constant Dollars) | $213 | $213 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL COSTS (Current Dollars) | $213 | $213 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Direct cost assumptions: (excludes land; 000)**

| | Unit Size (SF) | Cost/SF | Unit Cost |
|---|---|---|---|
| Single Family Homes | | | |
| Infrastructure | | | $97.7 |
| Subtotal | | | $97.7 |
| Cost Escalation Rate: | 5% | | |

**(2) Indirect cost assumptions:**

| | Pct. | Variable |
|---|---|---|
| Marketing | 1.5% | Res Sales |
| Insurance | 1.5% | Res Sales |
| Sales Comm | 2.5% | Res Sales |
| Subtotal | 5.5% | Res Sales |
| G&A | 2.5% | Dir Costs |
| Engr./Des. | 2.5% | Dir Costs |
| Contingency | 2.5% | Dir Costs |
| Subtotal | 7.5% | Dir Costs |

**(3) Construction Financing:**

| | |
|---|---|
| Loan Fees: | 2.0% |
| Interest Rate: | 10.0% |
| Period (Build and sell per unit, in months) | 6 |
| Even Draw | 0.5 |
| Effective Rate | 4.5% |

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 1- OPTION 2**
**EXHIBIT F-3**
**PROJECTED CASH FLOW**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$250,000 to $350,000 Price Range**
**(In thousands of dollars)**

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| | | YEARS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **PROJECT CASH FLOW** | TOTAL | 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
| Less: Land Acquisition | ($45) | ($45) | | | | | | | | | |
| Total Sales Proceeds | $320 | $320 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| Less: Direct and Indirect Costs | ($213) | ($213) | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| **PROGRAM CASH FLOW** | $62 | $62 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

**LAND RESIDUAL**

| | | |
|---|---|---|
| Net Present Value | 0% | $62 |
| | 10% | $56 |
| | 15% | $54 |
| | 20% | $52 |
| | 25% | $50 |

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

PARCEL 2 - OPTION 1

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EXHIBIT F-1

**SINGLE FAMILY HOUSING DEVELOPMENT**
**$130,000 to $160,000 Price Range**
**$145,000 Average Home Price/ $32,500 Average Lot Price**

| | TOTAL | YEARS 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **CLOSINGS** | 52 | 16 | 16 | 16 | 4 | 0 | 0 | 0 | 0 | 0 | 0 |
| **SALES REVENUES (1)** (Constant Dollars) | $7,540 | $2,320 | $2,320 | $2,320 | $580 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL REVENUES (2) (Current Dollars) | $7,985 | $2,320 | $2,436 | $2,558 | $671 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Average unit prices**
**In thousands** $145.0 per unit $32.5 per lot

| | | | |
|---|---|---|---|
| **Total Acres** | 15.8 | $142.20 | (Acquisition Cost, 000) |
| **Total Lots** | 52 | $2.73 | (Per Lot Cost, 000) |
| **Units/Acre (GROSS)** | 3.3 | $9.00 | (Per Acre, 000) |

**(2) Revenue escalation rate:** 5%

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 2 - OPTION 1**
**EXHIBIT F-2**
**PROJECTED COSTS**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$130,000 to $160,000 Price Range**
**(in thousands of dollars)**

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| | | YEARS | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | TOTAL | 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
| **DIRECT CONSTRUCTION (1)** | $5,039 | $1,550 | $1,550 | $1,550 | $388 | $0 | $0 | $0 | $0 | $0 | $0 |
| Infrastructure | $406 | $406 | $0 | | | | | | | | |
| **INDIRECT COSTS (2)** | $1,143 | $411 | $326 | $326 | $81 | $0 | $0 | $0 | $0 | $0 | $0 |
| **CONSTRUCTION FINANCING (3)** | $296 | $107 | $84 | $84 | $21 | $0 | $0 | $0 | $0 | $0 | $0 |
| **TOTAL COSTS** (Constant Dollars) | $7,290 | $2,880 | $1,960 | $1,960 | $490 | $0 | $0 | $0 | $0 | $0 | $0 |
| **TOTAL COSTS** (Current Dollars) | $7,666 | $2,880 | $2,058 | $2,161 | $567 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Direct cost assumptions: (excludes land: 000)**

| | Unit Size (SF) | Cost/SF | Unit Cost |
|---|---|---|---|
| Single Family Homes | 1,900 | $51.0 | $96.9 |
| Infrastructure | | | $405.7 |
| Subtotal | | | $405.7 |
| Cost Escalation Rate: | 5% | | |

**(2) Indirect cost assumptions:**

| | Pct. | Variable |
|---|---|---|
| Marketing | 1.5% | Res Sales |
| Insurance | 1.5% | Res Sales |
| Sales Comm | 5.0% | Res Sales |
| Subtotal | 8.0% | Res Sales |
| G&A | 5.0% | Dir Costs |
| Engr./Des. | 3.0% | Dir Costs |
| Contingency | 5.0% | Dir Costs |
| Subtotal | 13.0% | Dir Costs |

**(3) Construction Financing:**

| | |
|---|---|
| Loan Fees: | 2.0% |
| Interest Rate: | 10.0% |
| Period (Build and sell per unit, in months) | 6 |
| Even Draw | 0.5 |
| Effective Rate | 4.5% |

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 2 - OPTION 1**
**EXHIBIT F-3**
**PROJECTED CASH FLOW**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$130,000 to $160,000 Price Range**
**(In thousands of dollars)**

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| | | YEARS | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **PROJECT CASH FLOW** | TOTAL | 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
| Less: Land Acquisition | ($142) | ($142) | | | | | | | | | |
| Total Sales Proceeds | $7,985 | $2,320 | $2,436 | $2,558 | $671 | $0 | $0 | $0 | $0 | $0 | $0 |
| Less: Direct and Indirect Costs | ($7,666) | ($2,880) | ($2,058) | ($2,161) | ($567) | $0 | $0 | $0 | $0 | $0 | $0 |
| **PROGRAM CASH FLOW** | $177 | ($702) | $378 | $397 | $104 | $0 | $0 | $0 | $0 | $0 | $0 |

**LAND RESIDUAL**

| | | |
|---|---|---|
| Net Present Value | 5% | $103 |
| | 10% | $44 |
| | 15% | ($4) |
| | 20% | ($42) |
| | 25% | ($74) |

**INTERNAL RATE OF RETURN** 14.55%

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

PARCEL 2 - OPTION 2

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EXHIBIT F-1

SINGLE FAMILY HOUSING DEVELOPMENT
$130,000 to $160,000 Price Range
$145,000 Average Home Price/ $32,500 Average Lot Price

| | TOTAL | YEARS 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **CLOSINGS** | 65 | 16 | 16 | 16 | 17 | 0 | 0 | 0 | 0 | 0 | 0 |
| **SALES REVENUES (1)** (Constant Dollars) | $9,425 | $2,320 | $2,320 | $2,320 | $2,465 | $0 | $0 | $0 | $0 | $0 | $0 |
| **TOTAL REVENUES (2)** (Current Dollars) | $10,167 | $2,320 | $2,436 | $2,558 | $2,854 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Average unit prices**
**In thousands** $145.0 per unit $32.5 per lot

| | | | |
|---|---|---|---|
| **Total Acres** | 15.8 | $237.00 | (Acquisition Cost, 000) |
| **Total Lots** | 65 | $3.65 | (Per Lot Cost, 000) |
| **Units/Acre (GROSS)** | 4.1 | $15.00 | (Per Acre, 000) |

**(2) Revenue escalation rate:** 5%

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 2 - OPTION 2**
**EXHIBIT F-2**
**PROJECTED COSTS**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$130,000 to $160,000 Price Range**
**(in thousands of dollars)**

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| | TOTAL | YEARS 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **DIRECT CONSTRUCTION (1)** | $6,299 | $1,550 | $1,550 | $1,550 | $1,647 | $0 | $0 | $0 | $0 | $0 | $0 |
| Infrastructure | $473 | $473 | $0 | | | | | | | | |
| **INDIRECT COSTS (2)** | $1,422 | $425 | $326 | $326 | $346 | $0 | $0 | $0 | $0 | $0 | $0 |
| **CONSTRUCTION FINANCING (3)** | $368 | $110 | $84 | $84 | $90 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL COSTS (Constant Dollars) | $9,035 | $3,031 | $1,960 | $1,960 | $2,083 | $0 | $0 | $0 | $0 | $0 | $0 |
| TOTAL COSTS (Current Dollars) | $9,662 | $3,031 | $2,058 | $2,161 | $2,412 | $0 | $0 | $0 | $0 | $0 | $0 |

**(1) Direct cost assumptions: (excludes land: 000)**

| | Unit Size (SF) | Cost/SF | Unit Cost |
|---|---|---|---|
| Single Family Homes | 1,900 | $51.0 | $96.9 |
| Infrastructure | | | $473.0 |
| Subtotal | | | $473.0 |
| Cost Escalation Rate: | 5% | | |

**(2) Indirect cost assumptions:**

| | Pct. | Variable |
|---|---|---|
| Marketing | 1.5% | Res Sales |
| Insurance | 1.5% | Res Sales |
| Sales Comm | 5.0% | Res Sales |
| Subtotal | 8.0% | Res Sales |
| G&A | 5.0% | Dir Costs |
| Engr./Des. | 3.0% | Dir Costs |
| Contingency | 5.0% | Dir Costs |
| Subtotal | 13.0% | Dir Costs |

**(3) Construction Financing:**

| | |
|---|---|
| Loan Fees: | 2.0% |
| Interest Rate: | 10.0% |
| Period (Build and sell per unit, in months) | 6 |
| Even Draw | 0.5 |
| Effective Rate | 4.5% |

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

**PARCEL 2 - OPTION 2**
**EXHIBIT F-3**
**PROJECTED CASH FLOW**
**SINGLE FAMILY HOUSING DEVELOPMENT**
**$130,000 to $160,000 Price Range**
**(In thousands of dollars)**

02-3868
Jun-91
HCF

| | | YEARS | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **PROJECT CASH FLOW** | TOTAL | 1992 0 | 1993 1 | 1994 2 | 1995 3 | 1996 4 | 1997 5 | 1998 6 | 1999 7 | 2000 8 | 2001 9 |
| Less: Land Acquisition | ($237) | ($237) | | | | | | | | | |
| Total Sales Proceeds | $10,167 | $2,320 | $2,436 | $2,558 | $2,854 | $0 | $0 | $0 | $0 | $0 | $0 |
| Less: Direct and Indirect Costs | ($9,662) | ($3,031) | ($2,058) | ($2,161) | ($2,412) | $0 | $0 | $0 | $0 | $0 | $0 |
| **PROGRAM CASH FLOW** | $269 | ($948) | $378 | $397 | $442 | $0 | $0 | $0 | $0 | $0 | $0 |

**LAND RESIDUAL**

| | | |
|---|---|---|
| Net Present Value | 5% | $146 |
| | 10% | $50 |
| | 15% | ($25) |
| | 20% | ($85) |
| | 25% | ($132) |

**INTERNAL RATE OF RETURN** 13.20%

SOURCE: Robert Charles Lesser & Co. based on cost estimates provided by Jaeger/Pyburn

# 8.0 Development Options: Evaluation

**Jaeger**

**Pyburn**

Planning
Architecture
Historic Preservation
Landscape Architecture

# 8.0 Development Options: Evaluation

In this section of the report, the development options presented in the preceding two sections have been analyzed using the following criteria. These include: (1) Compatibility with regulatory controls; (2) Potential traffic impact; (3) Financial feasibility to include development costs, anticipated profits, and marketability.

It is also important that development options are compatible with preservation objectives. Preservation compatibility is inherent in all of the development options presented. Both parcels proposed for development are located outside the preservation boundaries, explained in Section 4.0, and specific design criteria to follow, such as the grid layout for multifamily buildings or vegetative buffers for single family buildings, were described in Section 6.0.

## 8.1 Parcel One/Option One

Parcel one/option one proposes the development of 16 single family lots on the approximate five acre tract adjacent to Country Club Drive. This development option is compatible with the existing Single Family zoning. The development would be detrimental to wetland preservation, requiring that the existing wetland be relocated.

The 16 new residences would generate additional traffic. Though traffic counts would not increase dramatically, the new residents would be required to traverse the entire site along Country Club Drive to access the lots, a potential disruption to activities within the historic core. Financially, this development option offers a minimal profit of $44,100. Demand is currently not high for single family development, so the marketability of this option is weak.

## 8.2 Parcel One/Option Two

The development of four estate-sized lots would be more desirable than the 16 lot proposal. This option is in concert with existing zoning, provides for the preservation of the wetland, and lessens the potential for traffic disruption. Like the 16 acre option, this option also offers a minimal profit of $45,000.

## 8.3 Parcel Two/Option One

The development of 52 single family lots on the site adjacent to Tatum Street is compatible with existing zoning. Traffic would be increased on Folly Beach Road and Tatum Street. A profit of $142,200 is anticipated.

## 8.4 Parcel Two/Option Two

The development of approximately 65 to 75 single family residences on parcel two using the city's PUD classification appears to be the most compatible development option. Although this option requires a zoning change from SR-1 to PUD-SR-I, density of development is not increased. The new zoning classification only allows greater flexibility in the design of the development. Traffic will be increased, but access from the site is planned, like the apartment layout, to be from Tatum Road. Financially, this option is attractive and results in a potential profit of almost a quarter of a million dollars.

# 9.0 Preferred Development Plan

**Jaeger**

**Pyburn**

Planning
Architecture
Historic Preservation
Landscape Architecture

# 9.0 Preferred Development Plan

The purpose of this study has been to balance cultural conservation with economic development. In the final analysis, the scales have been weighted toward cultural conservation. The wealth of cultural resources restricts economic development potential. The preservation boundary encompasses almost 60 percent of the site. The remaining 40 percent that offers development potential does not produce an economic return that justifies development for the long term. The preservation of the entire site appears to be the most beneficial direction for the City of Charleston in protecting a local site of significant historical importance and, specifically, for the James Island community, where public open space is a critical need.Cultural conservation has been determined as the most appropriate option for the entire site.

Cultural conservation can take many forms at the McLeod site. For purposes of this report, an interpretative historic site use has been explored. There are other options, such as a conservation and preservation technical center that might also be considered. This should be explored in future studies and is not a part of the scope of this effort. In all likelihood, the the conservation and preservation center might work in concert with a interpretative historic site use. A conservation and preservation center would further the technology of historic preservation and the McLeod buildings could be used as centers for learning as well as centers of interpretation.

This section of the report illustrates and describes a cultural conservation use of the entire tract. Illustrated on Map 13:Preferred Development Plan, the plan shows support functions, such as parking areas, and also suggests that a portion of the site be retained for continued use as a Fire Station for the City of Charleston. The narrative also explores additional involvement from the City of Charleston in the 6.8 acre site north of Country Club Drive. The financial feasibility of the McLeod site as historic site is also explored in this section.

## 9.1 Historic Site Use

Map 13: Preferred Development Plan illustrates support functions at the McLeod site to include parking and an orientation center. The uses are located in the area of the site noted in Section 4.0: Preservation Boundary as falling somewhere between secondary and tertiary preservation zones. This site includes a parking lot accommodating between 150-175 cars and an orientation center/gift shop.

The parking lot should allow access for both cars and buses. The lot could be designed to facilitate bus parking on low visitor days. It is suggested that an off-

site parking area be utilized on high visitor days and that buses, after dropping passengers at the orientation center, be directed to this lot. This will insure that the limited space in the parking lot is used efficiently. The parking lot has been illustrated with a heavy landscape treatment. Landscape elements include a landscaped area at the entrance, tree plantings within the lot, and a vegetative buffer on the periphery, designed to screen the lot from the remainder of the plantation site.

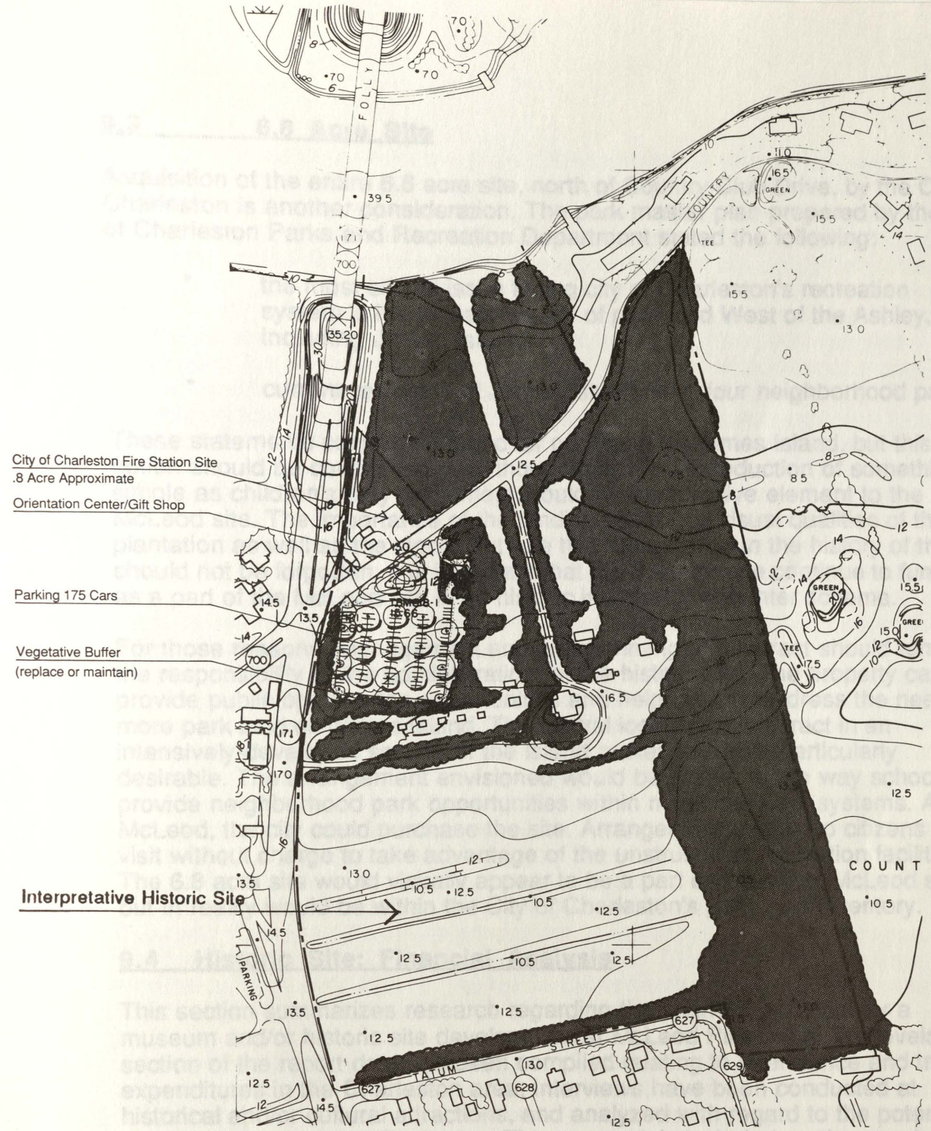
The anticipated circulation flow at the site is described as follows. Once arriving at the site and parking, the visitor will be directed to the orientation center for general information about the site (map and brochure) and for ticket purchase. Circulation flow would take the visitor south on the Landing Drive allee to the plantation house. After viewing the collection of historic structures on the ridge - plantation house, slave row, and outbuildings - and the agricultural fields, the visitor will be directed north on Landing Drive to the waterfront area.

The precise program at the waterfront is undetermined at this time, but it is desirable to consider an intensity in use in this area. The landing site, historically, was a heavily-used zone. This area served as a major transportation link between the plantation and the city prior to the construction of the original Wappoo Bridge. A dock and store building were located in this area based on historic maps and photographs. Proposed activities in this area might include a food concession that interprets the "store" theme and at the same time adds a revenue generation capability to the site.

After experiencing the waterfront zone, the visitor will be directed south on Landing Drive, passing by the cemetery. The program for the cemetery should be developed when more information and the extent of the cemetery location is known. The visitor will end the McLeod Plantation tour at the gift shop section of the orientation center structure. Again, another opportunity to add to the revenue generating potential of the site.

## 9.2 Fire Station Site

Contacts with the City of Charleston have continually confirmed the city's interest in maintaining a fire station on the currently leased site. It has been reported that the city is interested in purchasing an approximate one acre tract at the corner of Folly Road and Country Club Drive. A .8 acre site has been delineated on Map 13 as the proposed location for the fire station. The precise location of the cemetery should be determined prior to the disposition of the fire station tract, if this option is selected.




# Preferred Development Plan

**MAP 13**

Scale in Feet

NORTH

*McLeod Plantation*

*James Island, South Carolina*

*Historic Charleston Foundation*
*Charleston, South Carolina*


JAEGER PYBURN

Planning
Architecture
Historic Preservation
Landscape Architecture

110 Washington Street
Gainesville, Georgia 30501 404/534-7884

NEW SOUTH ASSOCIATES
Archeology

ROBERT CHARLES LESSER
Real Estate Analysis

## 9.3 6.8 Acre Site

Acquisition of the entire 6.8 acre site, north of Country Club Drive, by the City of Charleston is another consideration. The park master plan prepared by the City of Charleston Parks and Recreation Department stated the following:

* the most critical issue facing city of Charleston's recreation system is inadequate supply of park land West of the Ashley, including James Island

* current residents of James Island need four neighborhood parks

These statements confirm the need for park land on James Island, but this option should be considered very thoughtfully. The introduction of something as simple as children's play equipment would be an intrusive element to the McLeod site. The importance of the landing site to the visual qualities of the plantation as well as the significant role this area played in the history of the site should not be forgotten. It is important that the 6.8 acre site continue to function as a part of the McLeod site in an historic interpretative center scheme.

For those reasons, management and programming of this tract should remain the responsibility of the administration for the historic site. The property can still provide public open space opportunities and help the city address the need for more park land on James Island. The central location of this tract in an intensively-developed section of the Island makes this tract particularly desirable. The arrangement envisioned would be similar to the way school sites provide neighborhood park opportunities within municipal park systems. At McLeod, the city could purchase the site. Arrangements made so citizens could visit without charge to take advantage of the unstructured recreation facilities. The 6.8 acre site would visually appear to be a part of the larger McLeod site, but in reality would be within the City of Charleston's park land inventory.

## 9.4 Historic Site: Financial Analysis

This section summarizes research regarding the financial potential for a museum and/or historic site development at McLeod Plantation. To develop this section of the report data has been compiled relating to attendance and travel expenditures in the Charleston area, interviews have been conducted at historical and/or cultural attractions, and analyzed with regard to the potential for a facility at McLeod Plantation. This research is included on the attached exhibits and is summarized below.

The feasibility of museum/historical development at the site will be impacted by many factors including: the historical significance of the site, educational and cultural programming opportunities, local and visitor attendance trends within the Charleston area, programs at existing and planned facilities, the site's location and access, and physical characteristics of the property. Based on our analysis, we believe there is a strong opportunity for development of a historical/cultural facility at the property.

Based on research by both the project preservationist and archaeologist, the site clearly has a significant history, with evidence dating back to the seventeenth century and beyond. Considering its long history, the site will offer numerous opportunities to explore various periods of time, which will broaden the appeal of the facility to visitors. The location of the site along Folly Road and within close proximity to downtown is also a positive factor and will enable the facility to attract visitors from the downtown area. We also anticipate that the site will attract visitors headed to beaches and resorts (such as Kiawah and Seabrook) due to its en route location. The possibility of additional attractions on James Island (such as historic development at the Dill Property) will also encourage tourism and visitation to James Island. The success of the recently opened James Island County Park is a positive indication of this potential.

## 9.5 Area Attendance and Tourism Data

Demand for a cultural/educational facility at McLeod Plantation is likely to be influenced by both locals and visitors to the Charleston area. Local visitors are likely to include historical interest groups, school-aged children, families, etc. Advertisements, sponsoring special exhibits, and/or an on-going education program will create opportunities to continually attract the local market to the property. Efforts to attract out-of-town visitors will be reliant on overall visitation patterns in Charleston. This segment of demand is likely to be captured from among current visitors to Charleston. A review of current travel and tourism trends in Charleston and the surrounding area will provide insight into the site's potential.

Annual attraction attendance for the State of South Carolina by type of attraction and season is shown on Exhibit A. Total attendance has ranged from 7.9 million to over 8 million visitors annually from 1988 to 1990 at statewide attractions, according to the state Department of Parks, Recreation and Tourism (PRT). Between 15% and 17% of the attendance is at historical homes and sites, with another 12% devoted to museums and galleries. The spring and summer months capture over 70% of year-round attendance, indicating that these months are likely to be peak times for the proposed facility, as well.

An inventory of existing attractions (both historic and other) in Charleston is tabled on Exhibit B. The attractions are sorted by their locations within the Trident area. Not surprisingly, the majority of attractions (nearly 70%) are located in the downtown area. The next highest concentration of attractions is in West Ashley including Charles Towne Landing and other properties north of downtown such as Drayton Hall, Middleton Place, and Magnolia Plantation. Aside from being en route to the beaches, the only other existing attraction on James Island is the new county park. The opportunity to provide a new facility on James Island will encourage more tourist related activities in the area and produce additional revenues.

Monthly visitation counts for selected Charleston attractions are shown on Exhibit C. Attendance among the 13 reporting attractions has ranged between

985,000 and 1.2 million over the past two years. As evidenced by the decrease in attendance in the fall of 1989 and early 1990, many attractions were significantly impacted by Hurricane Hugo. Year-to-date figures for 1991 indicate an increase in visitation relative to 1990, however figures are still not at the level of early 1989. The lack of additional data makes it difficult to project visitation trends from this information, however annual travel revenue data (Exhibit D) provides additional insight into area trends.

As shown on the exhibit, travel revenues have steadily increased since 1985 in both Charleston and much of the surrounding area.This is a positive signal indicating growth in the travel and visitor industry. Charleston consistently captures over 90% of revenues spent in the Trident area.The growth in revenues suggests the opportunity for McLeod Plantation to capture its own share of the growth, which might not have been possible, or at a minimum, more difficult in a declining market.

## 9.6 Cultural/Attraction Interviews

In order to gain a better understanding of the potential positioning of McLeod Plantation in the market, we interviewed representatives from existing attractions regarding their orientation and performance. We also spoke with them regarding future plans for expansion and/or new programs as well as their impressions of the potential for a new cultural/educational facility on James Island at McLeod Plantation. Our interviews are tabled on Exhibit F and discussed below. In general, our surveys indicated a positive response with regard to the potential for an historical/cultural facility at McLeod Plantation.

Our surveys included discussions with eleven of the major attractions within the Charleston area including both historical sites, museums, and gardens. Average annual attendance figures total nearly 1.6 million among the projects surveyed. Patriots Point Naval and Maritime Museum is consistently the number one attraction, averaging 400,000 visitors per year. Sites which include a combination of attractions, such as Charles Towne Landing, Magnolia Gardens, Boone Hall Plantation, and Middleton Place average between 100,000 and 250,000 visits annually. Those which offer a single attraction or focus (such as Drayton Hall) typically attract between 50,000 and 75,000 visitors annually. Most projects attract a mix of both locals and visitors. However, depending upon the orientation and programs offered at the facility, the mix may change.

The historic orientation of the surveyed projects ranges from colonial times and the Revolutionary War, to Civil War happenings, to the World War II battleships at Patriots Point. With the exception of the Charleston Museum, most projects tend to focus on a particular era of history. As a result, many area attractions take advantage of joint marketing efforts to encourage visitation at several projects featuring differing exhibits. Often, the projects compete more with other locations within Charleston (i.e., Mount Pleasant vs. West Ashley) than among themselves. (Magnolia Plantation and Middleton Place are notable exceptions.)

## 9.7 Historic Site Conclusions

As mentioned earlier, our preliminary analysis indicates positive potential for the development of McLeod Plantation as an historical/cultural facility. Our conclusions and recommendations are tabled on Exhibit G and discussed below.

In order to gain its fair share of area visitation, it will be important for McLeod Plantation to coordinate with existing attractions and create joint marketing and advertising packages. Perhaps, the project could work jointly with the planned Dill property and James Island County park to focus more visitation on James Island. You may also want to consider a joint marketing/ticketing package with one or more downtown attractions. This will encourage visitors to visit both downtown and James Island attractions. The facility should also take advantage of its location en route to area beaches and resorts (such as Kiawah and Seabrook) by marketing to visitors and vacationers.

It will also be important for McLeod to feature an historical perspective or program which is unique to the market. The full and varied history of the property should provide ample opportunities to do so. Possibilities includes the presentation of the plantation from the perspective of the "working plantation owner" as opposed to the perspective of the "wealthy plantation owner" which many existing plantations exhibit. McLeod may also capitalize on its rich black history with regard to the Freedman's Bureau and the Freedman's village that was established at the site in the late 1800's. Joe Joseph of New South Associates (team archaeologist) has indicated potential for an on-going archaeological site at the property which will also provide a unique activity in the market. Further exploration of the site may provide additional ideas.

Based on the performances of other attractions in the market and the preliminary concept for the McLeod facility, we estimate that the site will draw approximately 75,000 visitors (including locals and out-of-town visitors) on an annual basis. This is a baseline figure based on our preliminary review of the site. Offering special events and on-going programs (such as the archaeological dig) and/or marketing heavily to local school groups, could substantially increase visitation. Once specific programs are designed for the facility, a more thorough analysis of the demand and visitation potential of the project should be explored. However, that is beyond the current scope of work for our assignment.

Important site factors to consider with regard to development of the property as an historical attraction include visibility from Folly Road, parking, and accessibility. We suggest allowing accessibility from Folly Road at Country Club Drive (at the existing light). A suggested location for parking, as noted on Map 13, would be at the northwest portion of the 42-acre portion of the property. Good directional signage and partial clearing allowing for visibility of the site from the Wappoo Bridge will encourage visitation.

## 9.8 Funding Potential/Future Directions

Conservation of the entire McLeod site will require funds for acquisition, stabilization and development, and operation of the site. The Foundation should begin to aggressively pursue sources of funding and solicit local support in the effort to preserve "all of McLeod Plantation."

Historic Charleston has already obtained funds from the South Carolina Department of Parks, Recreation, and Tourism, which were used to commission this report. In addition, funding requests have been made to the South Carolina Department of Archives and History, who administers federal monies from the U. S. Department of the Interior, and discussions have been initiated directly with the National Parks Service a division of the Interior Department.

The archeological resources at the site also offer the potential of monies from the South Carolina Heritage Trust. In addition, the project archeologist has suggested that national sources, such as the National Geographic Society, may be interested in the significance of this site. According to Joe Joseph, additional archeological investigations would be necessary in the $25,000 to $30,000 range to confirm the preliminary findings of this report. With that information confirmed, interest on a national level may be possible.

In addition, the archeological resources as well as the other cultural elements - architectural and landscape architectural - may attract low cost services from institutions,such as, the College of Charleston and Clemson University.

Another potential source may include the local accommodations tax which is intended to encourage tourism and promotional opportunities. As we understand it, McLeod Plantation would be eligible to receive funding. Both the City of Charleston and Charleston County are allocated a portion of these funds, although the city is likely to have the greater share. The feasibility of this source should be further explored.The City of Charleston, as noted above, through the sale of the Fire Station site and funds from the Parks and Recreation Department offer additional sources of local monies.

Private donations should also be solicited. Private foundation monies were utilized in funding this study, but private fund raising should be more extensive than foundation sources. At McLeod there appears to be a unique opportunity to generate large sums through small donations from a large number of people.

In the course of the study, it became apparent that the McLeod site is endeared by much of the Charleston community. If people did not know the site by name, a quick description of "a line of slave cottages visible from Folly Road" brought immediate nods of recognition. Many people seemed to appreciate the "working plantation" orientation of McLeod. It was noted to be a place where normal people lived and worked, not the home of the landed gentry as found in the plantations on Ashley River Road. Local citizens expressed an interest in having a historic site that told this other story.

The James Island residents are a particularly important source to tap for funds. Citizens of the Island expressed a community-wide need for open space and a willingness to support a cause that provided it. In addition, residents of the Island noted that McLeod was the last surviving example of a plantation type that typified many others that had been lost. It was important to many that this site be preserved as a tangible example of the Island's history.

EXHIBIT A
ANNUAL ATTRACTION ATTENDANCE
STATE OF SOUTH CAROLINA
1988-1990

02-3868
HCF
May-91

**ANNUAL ATTENDANCE**

| | 1988 | | | 1989 | | | 1990 | | |
|---|---|---|---|---|---|---|---|---|---|
| | TOTAL | Summer | Spring | TOTAL | Summer | Spring | TOTAL | Summer | Spring |
| MUSEUMS AND ART GALLERIES | 1,083,615 | 228,445 | 366,262 | 979,686 | 233,658 | 300,969 | 994,145 | 253,480 | 324,742 |
| GARDENS, ZOOS, AND WILDLIFE AREAS | 1,705,084 | 541,430 | 689,911 | 1,879,648 | 614,516 | 710,263 | 2,022,904 | 595,340 | 739,279 |
| HISTORICAL HOMES AND SITES | 1,370,923 | 472,167 | 493,080 | 1,263,704 | 488,620 | 495,692 | 1,214,454 | 445,073 | 404,568 |
| OTHER | 3,802,557 | 1,959,447 | 1,117,066 | 3,949,003 | 1,987,867 | 1,153,090 | 3,781,154 | 1,932,093 | 972,813 |
| TOTAL | 7,962,179 | 3,201,489 | 2,666,319 | 8,072,041 | 3,324,661 | 2,660,014 | 8,012,657 | 3,225,986 | 2,441,402 |

**DISTRIBUTION OF ATTENDANCE**

| | 1988 | | | 1989 | | | 1990 | | |
|---|---|---|---|---|---|---|---|---|---|
| | TOTAL | Summer | Spring | TOTAL | Summer | Spring | TOTAL | Summer | Spring |
| MUSEUMS AND ART GALLERIES | 13.6% | 7.1% | 13.7% | 12.1% | 7.0% | 11.3% | 12.4% | 7.9% | 13.3% |
| GARDENS, ZOOS, AND WILDLIFE AREAS | 21.4% | 16.9% | 25.9% | 23.3% | 18.5% | 26.7% | 25.2% | 18.5% | 30.3% |
| HISTORICAL HOMES AND SITES | 17.2% | 14.7% | 18.5% | 15.7% | 14.7% | 18.6% | 15.2% | 13.8% | 16.6% |
| OTHER | 47.8% | 61.2% | 41.9% | 48.9% | 59.8% | 43.3% | 47.2% | 59.9% | 39.8% |
| TOTAL | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**SEASONAL CAPTURE OF ATTENDANCE**
(Percent of Total Attendance)

| | 1988 | | | 1989 | | | 1990 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Summer | Spring | Spring & Summer | Summer | Spring | Spring & Summer | Summer | Spring | Spring & Summer |
| MUSEUMS AND ART GALLERIES | 21.1% | 33.8% | 54.9% | 23.9% | 30.7% | 54.6% | 25.5% | 32.7% | 58.2% |
| GARDENS, ZOOS, AND WILDLIFE AREAS | 31.8% | 40.5% | 72.2% | 32.7% | 37.8% | 70.5% | 29.4% | 36.5% | 66.0% |
| HISTORICAL HOMES AND SITES | 34.4% | 36.0% | 70.4% | 38.7% | 39.2% | 77.9% | 36.6% | 33.3% | 70.0% |
| OTHER | 51.5% | 29.4% | 80.9% | 50.3% | 29.2% | 79.5% | 51.1% | 25.7% | 76.8% |
| TOTAL | 40.2% | 33.5% | 73.7% | 41.2% | 33.0% | 74.1% | 40.3% | 30.5% | 70.7% |

SOURCE: South Carolina Department of Parks, Recreation, & Tourism (PRT) Travel Trends, 1990
COMPILED BY: Robert Charles Lesser & Co.

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**EXHIBIT B**
**REGIONAL INVENTORY OF VISITOR ATTRACTIONS**
**WITHIN THE CHARLESTON TRIDENT AREA**

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| ATTRACTION | DESCRIPTION | LOCATION | TYPE OF ATTRACTION |
|---|---|---|---|
| Aquarium | Planned - 1991/1992 | Downtown | Informational |
| Festival Retail | Planned "Rouse-type" mall | Downtown | Retail |
| The Battery | historical homes | Downtown | Historic/Cultural |
| Waterfront Park | park area/planned retail/hotel | Downtown | Recreational |
| Omni/Charleston Place | Hotel/Retail mixed -use complex | Downtown | Retail |
| Visitors Center | information center | Downtown | Informational |
| "The Charleston Adventure" | film orientation at Visitors Center | Downtown | Informational/Entertainment |
| Downtown market | mix of retailers in an open market | Downtown | Retail/Historic |
| Charleston Museum | regional history/children's hands-on section | Downtown | Educational/Cultural/Historic |
| Dock Street Theater | Live performances | Downtown | Cultural/Entertainment |
| Gibbes Museum of Art | American paintings, etc | Downtown | Cultural/Entertainment |
| Patriots Point | Battleship tours/maritime museum | Downtown | Historic/Entertainment |
| Walking Tours | Downtown | Downtown | Historic/Entertainment |
| American Military Museum | dedicated to men/women in armed services | Downtown | Historic/Cultural |
| Confederate Museum | Confederate memorabilia | Downtown | Historic/Cultural |
| The Powder Magazine | oldest public building | Downtown | Historic/Cultural |
| Aiken Rhett Mansion | historic home (c. 1817) | Downtown | Historic/Cultural |
| Edmonston-Alston House | historic home | Downtown | Historic/Cultural |
| Exchange Building/Provost D. | historic building, originally customs house | Downtown | Historic/Cultural |
| Heyward-Washington House | historic home (c. 1772) | Downtown | Historic/Cultural |
| Joseph Manigault House | historic home (c. 1803) | Downtown | Historic/Cultural |
| Nathaniel Russell House | historic home (c. 1809) | Downtown | Historic/Cultural |
| Sherry's Pink House | pottery and art gallery | Downtown | Historic/Cultural |
| Thomas Elfe Workshop | historic home/cabinetmaking collections | Downtown | Historic/Cultural |
| Harbor Cruises | boat cruises to historical sites | In/Out DT | Historic/Entertainment |
| Fort Sumter | Historic fort | Charleston Harbor | Historic/Entertainment |
| The Citadel Museum | history of the Citadel | Citadel | Historic/Cultural |
| Charles Towne Landing | original settlement, colonial, gardens | West Ashley | Historic/Educational/Entertainment |
| Drayton Hall | Restored plantation 18th c. home | West Ashley | Historic/Cultural |
| Magnolia Plantation and Gardens | 500-acre estate, Civil War plantation | West Ashley | Historic/Entertainment/Gardens |
| Audobon Swamp Garden | 60-acre swamp, gardens | West Ashley | Entertainment/Gardens |
| Middleton Place | historic home and gardens | West Ashley | Historic/Entertainment/Gardens |
| James Island County Park | passive park, camping | James Island | Recreation |
| Boone Hall Plantation | cotton plantation, historic home | Mt. Pleasant | Historic/Entertainment/Gardens |
| Fort Moultrie | Historic fort | Sullivan's Island | Historic/Entertainment |
| Beaches | Kiawah/Sullivan/Isle of Palms | Surrounding | Recreation |
| Historic Churches | | Various Loc. | Historic/Cultural |
| County Parks, Recreation Areas | | Various Loc. | Recreation |

Source: Charleston Trident Convention and Visitors Bureau, AAA Tour Book and Robert Charles Lesser & Co.

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**EXHIBIT C**
**MONTHLY VISITATION COUNTS**
**FOR CHARLESTON AREA ATTRACTIONS 1/**

| | | | | ANNUAL % INCREASE | | PERCENT DISTRIBUTION | | |
|---|---|---|---|---|---|---|---|---|
| MONTH | 1989 | 1990 | 1991 | 1989-1990 | 1990-1991 | 1989 | 1990 | 1991 |
| JANUARY | 39,843 | 21,128 | 33,597 | -47.0% | 59.0% | 3.3% | 2.1% | --- |
| FEBRUARY | 54,013 | 43,276 | 51,930 | -19.9% | 20.0% | 4.5% | 4.4% | --- |
| MARCH | 137,483 | 77,640 | --- | -43.5% | --- | 11.5% | 7.9% | --- |
| APRIL | 179,597 | 108,390 | --- | -39.6% | --- | 15.1% | 11.0% | --- |
| MAY | 177,962 | 104,195 | --- | -41.5% | --- | 14.9% | 10.6% | --- |
| JUNE | 142,860 | 102,701 | --- | -28.1% | --- | 12.0% | 10.4% | --- |
| JULY | 171,641 | 129,752 | --- | -24.4% | --- | 14.4% | 13.2% | --- |
| AUGUST | 145,079 | 110,306 | --- | -24.0% | --- | 12.2% | 11.2% | --- |
| SEPTEMBER | 67,742 | 81,793 | --- | 20.7% | --- | 5.7% | 8.3% | --- |
| OCTOBER | 17,135 | 85,199 | --- | 397.2% | --- | 1.4% | 8.6% | --- |
| NOVEMBER | 35,638 | 78,503 | --- | 120.3% | --- | 3.0% | 8.0% | --- |
| DECEMBER | 22,144 | 42,208 | --- | 90.6% | --- | 1.9% | 4.3% | --- |
| Total | 1,191,137 | 985,091 | 85,527 | -17.3% | --- | 100.0% | 100.0% | --- |

Note: Hurricane Hugo struck Charleston in September, 1989 which significantly affected visitation.

1/ Counts include visits to Ft. Sumter, Ft. Moultrie, Heyward Washington House, Joseph Manigault House, Aiken Rhett House, Charleston Museum, Charles Towne Landing, Middleton Place, Gibbes Art Gallery, Nathaniel Russell House, Edmonston Alston House, Drayton Hall, and Patriots Point.

Source: Charleston Trident Convention & Visitors Bureau.
Compiled by : Robert Charles Lesser & Co.

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**EXHIBIT D**
**ANNUAL TRAVEL REVENUES**
**CHARLESTON TRIDENT AREA**
**1985-1989**

| | 1985 | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|---|
| **TRIDENT AREA** | $468,765 | $594,150 | $732,699 | $784,413 | $838,184 |
| CHARLESTON | $416,759 | $535,340 | $683,202 | $736,227 | $782,700 |
| DORCHESTER | $26,068 | $24,842 | $20,840 | $17,326 | $18,951 |
| BERKELEY | $25,938 | $33,938 | $28,657 | $30,860 | $36,533 |

| **Annual Change** | 1985 | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|---|
| **TRIDENT AREA** | --- | $125,385 | $138,549 | $51,714 | $53,771 |
| CHARLESTON | --- | $118,581 | $147,862 | $53,025 | $46,473 |
| DORCHESTER | --- | ($1,226) | ($4,002) | ($3,514) | $1,625 |
| BERKELEY | --- | $8,000 | ($5,281) | $2,203 | $5,673 |

| **Percent Distribution** | 1985 | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|---|
| **TRIDENT AREA** | 100% | 100% | 100% | 100% | 100% |
| CHARLESTON | 89% | 90% | 93% | 94% | 93% |
| DORCHESTER | 6% | 4% | 3% | 2% | 2% |
| BERKELEY | 6% | 6% | 4% | 4% | 4% |

SOURCE: South Carolina PRT, Charleston Trident Chamber of Commerce

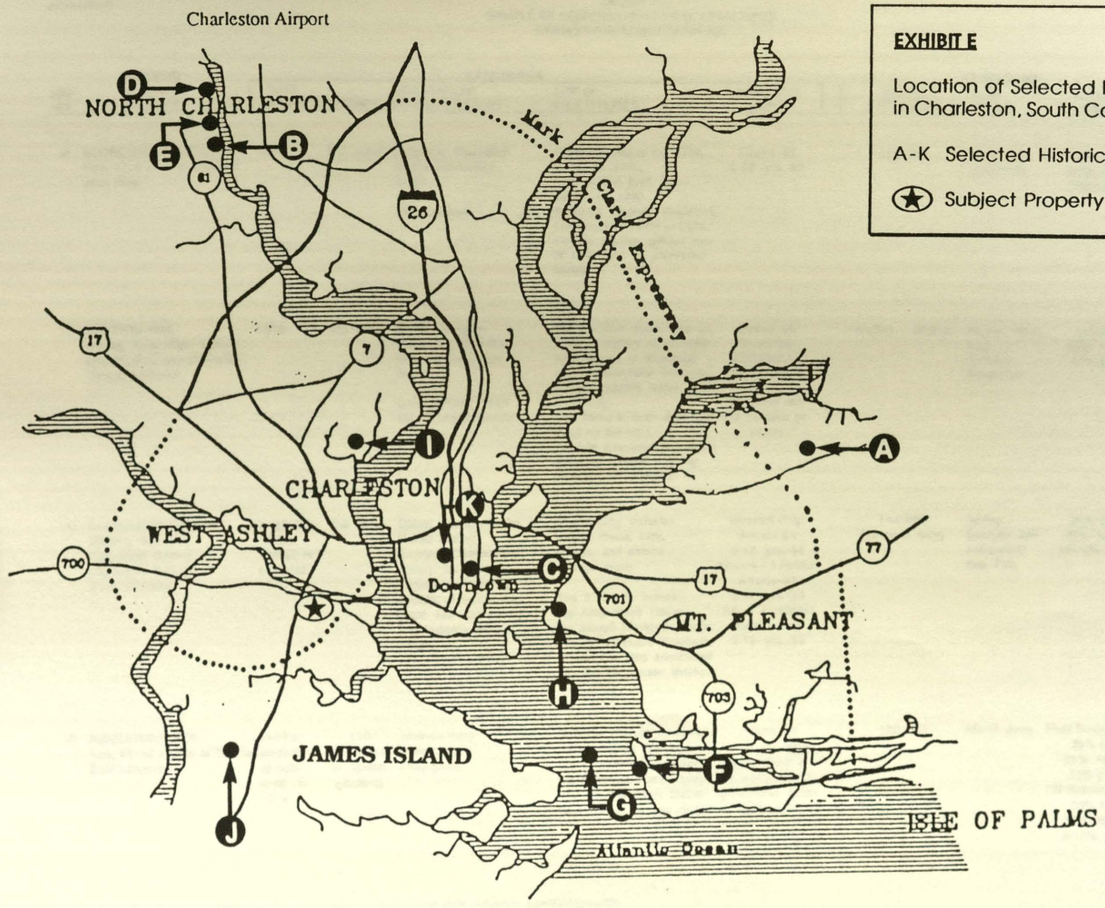


**EXHIBIT E** 02-3868.00

Location of Selected Historical Attractions in Charleston, South Carolina

A-K Selected Historical Attractions

Subject Property

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**EXHIBIT F**
**SAMPLE OF SELECTED HISTORICAL ATTACTIONS**
**CHARLESTON, SOUTH CAROLINA**

02-3868
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| MAP KEY | PROJECT/ LOCATION/ CONTACT | ATTRACTION: DATE OPENED | ACREAGE | ORIENTATION/ PERIOD OF HISTORY | TYPE OF FACILITY/USES | ADMISSION FEES | ATTENDANCE: ANNUAL ATTENDANCE | PEAK SEASON | ATTENDEE PROFILE | COMMENTS |
|---|---|---|---|---|---|---|---|---|---|---|
| A | **BOONE HALL PLANTATION**<br>Hwy. 17, 6 m. N of Charles.<br>Jean West | 1958 | 738 acres | Historical Plantation of the Antebellum South<br><br>18th Century | Plantation House ca. 1750, rebuilt in 1935; nine original brick slave cabins, ca. 1750 (National Historic Register); Gin House; "Avenue of Oaks." Visitors receive guided tour of first floor of plantation house. | Adults-$6<br>6-12 yrs.-$2 | 100,000 | March 1-<br>Labor Day | 10% local<br>90% tourist<br>25% group | Summer visitors are largely families, while Spring and Fall tends to attract seniors. Tourists are drawn from OH, NY, PA, FL, GA, and Canada. |
| B | **DRAYTON HALL**<br>Ashley River Hist. District<br>Hwy.61, 9 m. NW of Charles.<br>George McDaniel | 1976 | 125 acres | Oldest Georgian Palladian Plantation Home in the United States.<br><br>Colonial/Civil War/ War of Independence | The mansion, resembling an English country villa, retain high degree of structural and architectural integrity, without running water or elctricity.<br>The house is open daily with tours on the hour.<br>Student programs are available and catered property uses can be arranged. | Adults-$6<br>Students/ Children-$3<br>Under 5-free<br><br>$5 group rate (12 persons or more) | 50,000 - 60,000 | March, April, May;<br>October, November | 5% local<br>95% tourist<br>25% group | Due to nature of attraction, visitors are largely couples and singles, or families with older children.<br>Geographic distribution:<br>34% Southeast<br>21% Northeast<br>24% Midwest<br>12% West and Southwest<br>9% Foreign<br>800 "Friends of Drayton Hall" |
| C | **CHARLESTON MUSEUM**<br>Meeting Street<br>Charleston Battery<br>Charleston County<br>Brian Varnadoe | originally-1773;<br>new $6 m complex-1980 | 2-3 acres | Oldest museum in the United States;<br>Displays Charleston's history "from the beginning" including exhibits of animal and plant life illustrating Charleston's natural history. | New facility includes exhibit areas, labs, offices, and exhibit storage areas.<br><br>The 3 historic homes--the Aiken-Rhett House, the Joseph Manigault House and the Heyward-Washingto House--are also associated with the Charleston Museum. | Museum Only:<br>Adults-$4<br>3-12 yrs.-$2<br>Musem + 1 House:<br>Adults-$7<br>3-12 yrs.-$4<br>All 4 facilities:<br>Adults-$10<br>3-12 yrs.-$5 | 144,000 (museum only) | Spring, Summer, and somewhat into Fall. | 25% local<br>75% tourist<br>10-12% group | Visitors drawn from NC, GA, OH, PA, Mid-Atlantic states; typically upper-middle class. Charleston Co. Schools comprise good portion of group business. |
| D | **MIDDLETON PLACE**<br>Hwy. 61, 14 m. NW of Charles<br>Donna Owens | 1950's; established as non-profit in 1974 | 110 (60 acres of formal gardens) | 18th-century Lowcountry Plantation. | National Historic Landmark encompassing America's oldest landscaped gardens, the Middleton Place House, and the Plantation Stableyards (living outdoor museu | Adults-$9<br>6-12 yrs.-$4.5<br>Guided tours are an additional $5; off-season rates are $1 less. | 100,000 | March-June | Peak Season:<br>35% local<br>65% tourist<br>10% group<br>Off Season:<br>50% local<br>50% tourist<br>5-10% group | Visitors from all over the world; a lot of regional (Southeastern) visitors. Seniors tend to be more predominant in the Fall, families in the Spring and Summer. Local foundation members visit more often, usually bringing out-of-town guests. 1,500 members of Middleton Place Foundation (non-profit). |

SOURCE: Robert Charles Lesser & Co. based on discussions with individual agencies/projects.

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**EXHIBIT F, page 2**
**SAMPLE OF SELECTED HISTORICAL ATTACTIONS**
**CHARLESTON, SOUTH CAROLINA**

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| MAP KEY | PROJECT/ LOCATION/ CONTACT | *COMPETITIVE/COMPLIMENTARY PROJECTS* PERCEIVED COMPETITION | COMMENTS |
|---|---|---|---|
| A | **BOONE HALL PLANTATION**<br>Hwy. 17, 6 m. N of Charles.<br>Jean West | Magnolia Plantation, Middleton Plantation are largest competitors for attendance. | Boone Hall Plantation is a for-profit operation. Current advertising campaign includes mail-out programs, national and international magazine advertising, and work with the National Tour Association and the American Bus Association. Boone Hall also works with the Charleston Restaurant Association to produce the "Annual Oyster Festival", as well as various Civil War re-enactment groups. |
| B | **DRAYTON HALL**<br>Ashley River Hist. District<br>Hwy.61, 9 m. NW of Charles.<br>George McDaniel | Projects West of the Ashley River, such as Middleton Place and Magnolia Plantation, are percieved as complimentary rather than competitive, as they serve to draw visitors to this area as opposed to the area East of the Cooper, which offers attractions such as Patriot's Point. | Property is jointly owned by the National Trust for Historic Preservation and the state of South Carolina. Drayton Hall is a National Historic Landmark and is accredited by the American Association of Museums. It is the only authentic, unrestored 18th century plantation home open to the public. National Trust members receive free admission and discounts. Current plans for expansion include the development of an interpretation and visitor's center, which will be a museum-type attraction. Estimated time frame is from 5 to 10 years. |
| C | **CHARLESTON MUSEUM**<br>Meeting Street<br>Charleston Battery<br>Charleston County<br>Brian Varnadoe | Compete with 3 other historic houses open to the public.<br>Also feel competition from the "market area"-antique shops, curio shops, etc. | The Charleston Museum works with the Charleston Heritage Foundation to help promote non-profit organizations and the importance of their role in the local economy. The museum is being introduced in phases, with the second phase, addressing the period of time from the Civil War to the 20th century, to begin within the next year. The third and final phase will be dedicated to a natural history hall. Sees opportunity for McCleod Plantation to work with James Island County Park in offering a package deal that would include use of conference and lodging facilities at the park and opportunity to visit McCleod and Dill Property for interpretive/cultural programs. |
| D | **MIDDLETON PLACE**<br>Hwy. 61, 14 m. NW of Charles.<br>Donna Owens | Magnolia Plantation (next door) is biggest competition, as the two are often seen as substitutes. | Middleton Place sells combination tickets with the Edmonston-Alston House in the Battery in order to offer both "city life" and "country life" interpretations of Charleston history. They also work with Drayton Hall to co-ordinate special events and educational programs. Future plans for expansion include the development of an African-American program. Freedman's quarters would be restored as part of an interpretive program designed to recreate living and working conditions of blacks in the 18th and 19th century. |

SOURCE: Robert Charles Lesser & Co. based on discussions with individual agencies/projects.

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**EXHIBIT F**
**SAMPLE OF SELECTED HISTORICAL ATTACTIONS**
**CHARLESTON, SOUTH CAROLINA**

02-3868
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| MAP KEY | PROJECT/ LOCATION/ CONTACT | ATTRACTION: DATE OPENED | ACREAGE | ORIENTATION/ PERIOD OF HISTORY | TYPE OF FACILITY/USES | ADMISSION FEES | ATTENDANCE: ANNUAL ATTENDANCE | PEAK SEASON | ATTENDEE PROFILE | COMMENTS |
|---|---|---|---|---|---|---|---|---|---|---|
| E | **MAGNOLIA PLANTATION AND GARDENS**<br>Hwy. 61, 10 m. NW of Charles.<br>Betsy Veronee | 1870 | Gardens- 50 acres; Plantation- 500 acres. | America's oldest major garden | The Plantation House is not a museum, but is designed to illustrate actual plantation living since the Civil War. A petting zoo, mini-horse ranch, and 125-acre waterfowl refuge are also part of the attraction. | Garden Only:<br>Adults-$8<br>4-12 yrs.-$4<br>13-19 yrs.-$6<br>Combination Ticket w/Audubon Swamp:<br>+$2 for Adults,<br>+$1 for child./teens<br>Guided tours of the Plantation House are an additional $4 | 150,000 | March-May (represents 50% of ann. attendance) | 10% local<br>90% tourist<br>12-15% group,<br>30% in peak season | Large representation of visitors from Ohio due to advertising campaign<br>Local visitors are members of the Audubon Foundation and their guests. |
| F | **FORT SUMTER**<br>Charleston Harbor<br>(tours depart from City Marina on Lockwood Blvd. and Patriot's Point , Mt. Pleasant) | 1950's | 2.5 acres | Island fort where the Civil War began. | 2.5 hour tour on sight-seeing yachts includes stop at Fort Sumter (this is the only access to the Fort). Fort contains museum and gift shop. | Fort Sumter Tours:<br>Adults-$8<br>under 12 yrs.-$4<br>under 6 yrs.-free | 215,000 | Mid-March - Sept.<br>(July is peak month) | 50% local<br>50% tourist<br>8% group | A lot of local guests bring out-of-town guests; heavy traffic from I-95 travelers on way to Florida; several school groups. |
| G | **FORT MOULTRIE**<br>Charleston Harbor<br>(tours depart from City Marina on Lockwood Blvd. and Patriot's Point , Mt. Pleasant) | 1976 | 29 | Site of one of first decisive Patriot victories of the American Revolution. | Fort Moultrie is part of the Fort Sumter National Monument . It is a restored fort reflecting the story of American seacoast defense. 20-minute film, 30-minute slide show. | no charge with purchase of Fort Sumter admission | 130,000 | Mid-March - Sept.<br>(July is peak month) | 50% local<br>50% tourist<br>8% group | (see Fort Sumter comments) |
| H | **PATRIOT'S POINT NAVAL AND MARITIME MUSEUM**<br>Charleston Harbor, Mt. Pleasant<br>Henry Chandler | 1976 | 450 | World's largest Naval and Maritime Museum; focus on WWII period of history. | Ships, aircraft, missiles, and guns on display; working areas of ships open for tour; centerpiece is Yorktown aircraft carrier. | Adults-$8<br>6 -12 yrs.-$4<br>under 6 yrs.-free | 400,000 | Easter - Labor Day | 10-15% local<br>85-90% tourist<br>10-15% group | Visitors drawn largely from the Southeastern corridor of the United States, from Ohio down to Florida. Typical visitor is 35, married, with an average income of $35,000.<br>15,000 Boy Scouts annually. |
| I | **CHARLES TOWNE LANDING**<br>Old Town Road, West Ashley<br>Charleston Co.<br>Janson Cox | 1971 | 600 + acres | State-owned nature preserve and historic site--South Carolina's first permanent English Colonial settlement | Original fortified town, replicas of colonial bldgs., replica of 17th century trading vessel, special events, concerts-in-the-park, nature areas and landscaped gardens. Facilities may be reserved for group uses/community uses. | Adults-$5<br>6 -14 yrs.-$2.50<br>Seniors-$2.50<br>under 5 yrs.-free | 250,000 | Mid-March - September | 60-65% local<br>35-40% tourist<br>unk.% group | School groups comprise a significant amount of local visitation with 1,000 to 2,000 students per day visiting. Tourists are drawn largely from OH and MI, as well as Southeastern states. |

| MAP KEY | PROJECT/ LOCATION/ CONTACT | COMPETITIVE/COMPLIMENTARY PROJECTS: PERCEIVED COMPETITION | COMMENTS |
|---|---|---|---|
| E | **MAGNOLIA PLANTATION AND GARDENS**<br>Hwy. 61, 10 m. NW of Charles.<br>Betsy Veronee | Patriot's Point is biggest perceived competition. | Currently considering renovating row of slave cabins located on property in order to show 18th century slave life. Cabins would be furnished with original period furniture and have attendants. The focus of the project would be recreation of lifestyle, with an education as well as entertainment as a goal.<br>Magnolia Plantation offers significant discounts on tickets when purchased jointly with Audubon Swamp Gardens. This is the only other attraction with which Magnolia Plantation coordinates. |
| F | **FORT SUMTER**<br>Charleston Harbor<br>(tours depart from City Marina on Lockwood Blvd. and Patriot's Point , Mt. Pleasant) | Fort Sumter and Fort Moultrie are unique in the Charleston area--no other projects are directly ocmpetitive. | Tours of Fort Sumter are conducted by the National Park Service. Plans for a new tour boat facility with an exhibit area are currently in the process of being finalized. Fort Sumter and Fort Moultrie are due to have exhibits remodeled by the Summer of 1994. |
| G | **FORT MOULTRIE**<br>Charleston Harbor<br>(tours depart from City Marina on Lockwood Blvd. and Patriot's Point , Mt. Pleasant) | Fort Sumter and Fort Moultrie are unique in the Charleston area--no other projects are directly ocmpetitive. | (see Fort Sumter comments) |
| H | **PATRIOT'S POINT NAVAL AND MARITIME MUSEUM**<br>Charleston Harbor, Mt. Pleasant<br>Henry Chandler | Charles Towne Landing; Boone Hall Plantation | Future plans for expansion at Patriot's Point include a 412-slip marina, hotel, and retail and commercial development., projected to begin within 6 months to 1 year. Patriot's Point supports the Trident Travel Council of the Chamber of commerce, working closely with the organization for promotion. |
| I | **CHARLES TOWNE LANDING**<br>Old Town Road, West Ashley<br>Charleston Co.<br>Janson Cox | Charles Towne Landing jointly promotes other local attractions via an educational package sent to requesting tour groups and schools. | The philosophy of Charles Town Landing is to serve the community, thus they have received a significant amount of local support. Attendance is second only to Patriot's Point, with school groups being a significant source of business. Feels that opportunity in the market is for a "working-man's plantation" with a living farm, or "hands-on" approach. Primary focus should be educational, recreating life of turn-of-the-century shareholder. |

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**EXHIBIT F**
**SAMPLE OF SELECTED HISTORICAL ATTACTIONS**
**CHARLESTON, SOUTH CAROLINA**

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| MAP KEY | PROJECT/ LOCATION/ CONTACT | ATTRACTION: DATE OPENED | ACREAGE | ORIENTATION/ PERIOD OF HISTORY | TYPE OF FACILITY/USES | ADMISSION FEES | ATTENDANCE: ANNUAL ATTENDANCE | PEAK SEASON | ATTENDEE PROFILE | COMMENTS |
|---|---|---|---|---|---|---|---|---|---|---|
| J | **JAMES ISLAND COUNTY PARK**<br>Riverland Road<br>James Island<br>Linda Turner | September 1990 | 643 | Passive park | County park with nature trails, lakes, pedal boating crabbing and fishing dock 10 rental vacation cottages 125 RV Campground Conference and meeting facilities, multi-purpose stage | $1/person Vacation cottages: $75/night $450/week (fully furnished) | From September through March, 1991: 48,646 Lodging: 35% occupancy to date | Summer months are anticipate to be the peak season | Anticipate mix of locals and visitors | Visitors will include families and vacationers. Also some social and corporate meeting groups will make use of meeting facilities. |
| K | **AVERY RESEARCH CENTER**<br>Bull Street<br>Downtown Charleston<br>Millicent Brown | 1985 at College of Charleston; Oct.,1990 current facilities | n/a (former high school site) | Black History and Cultural Center | Located in renovated Avery Normal High School; one permanent exhibit room one traveling exhibit room, archives/reading room. | None--facility is open to the public. | Only in current facilities since October, 1990; attendence has been "high" recently due to Spoleto. | Anticipate heavier use of facilities during the academic year; some increased "tourist" business during summer. | Visitors include scholars/students researching dissertations, writing books; many local and out-of-state tour groups (mostly school groups of all ages) | The Center is not open on the weekends, except by appointment. Walk-ins receive guided tours, groups may arrange to hear speakers on a subject of their choice (Civil Rights, etc.). |

SOURCE: Robert Charles Lesser & Co. based on discussions with individual agencies/projects.

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EXHIBIT F, page 2
SAMPLE OF SELECTED HISTORICAL ATTACTIONS
CHARLESTON, SOUTH CAROLINA

02-3868
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Apr-91

| MAP KEY | PROJECT/ LOCATION/ CONTACT | *COMPETITIVE/COMPLIMENTARY PROJECTS* PERCEIVED COMPETITION | COMMENTS |
|---|---|---|---|
| J | **JAMES ISLAND COUNTY PARK**<br>Riverland Road<br>James Island<br>Linda Turner | May compete with other parks or beach areas | Attendance and lodging at the park is above projections for the facility. The county park at Folly Beach averages annual attendance of 40,000, which James Island has surpassed in just 6 months of operation. They would welcome additional visitor attractions on James Island. |
| K | **AVERY RESEARCH CENTER**<br>Bull Street<br>Downtown Charleston<br>Millicent Brown | The Center is a non-profit, state funded organiz. that serves primarily an academic function. The Center serves as a resource for projects (such as Middleton Place's African-American program), and thus does not "compete" for attendance. | The Avery Research Center first opened in 1985 at the College of Charleston. In October,1990, Avery moved to its current location in the renovated Avery Normal High School. Graduates of the former all-black high school were instrumental in the establishment of the historical/cultural center. Renovation of the third floor of the building is still under progress. The permanent exhibit room chronicles the history of the Avery Normal H.S. The Avery Research Center receives funding from the College of Charleston, and hopes to have a full-time research staff at some point in the future. Avery caters to a very limited audience, mainly those researching African-American history and culture, especially in the South and Low Country. |

SOURCE: Robert Charles Lesser & Co. based on discussions with individual agencies/projects.

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**EXHIBIT G**
**ISSUES/COMMENTS REGARDING FEASIBILITY OF**
**CULTURAL AND EDUCATIONAL FACILITY**
**AT McLEOD PLANTATION**
**JAMES ISLAND, SOUTH CAROLINA**

OVERVIEW

- Interviews with area attractions and historical facilities indicate a positive response regarding the potential for an educational and cultural facility at McLeod Plantation.
- Current lack of historical and visitor attractions on James Island. Development of the site will provide a close-in opportunity for visitors to experience an historic plantation.
- Development of Dill property and James Island County Park along with McLeod Plantation will create a "critical mass" to attract visitors.
- Existing plantation properties have focused more on lifestyle of plantation owners, as well as the development of gardens and natural displays.
  The possibility of focusing McLeod Plantation on aspects of the working man's plantation provides a niche in the current offerings in the market.
- The opportunity to provide insight to african-american history with regard to the Freedman's quarters at the site will fulfull a niche in the Charleston market, in addition to a more "typical" plantation. However, Middleton Place will offer similar attractions.

**SITE FACTORS**

- Parking:
  Should be on-site, partially visible from Folly Beach Road
  landscaped buffer between parking, preservation area and any residential development.
- Accessibility from Folly Beach Road: prefer access to site from Country Club Drive intersection with pedestrian access up oak alley.
- Preservation of agricultural field is a unique attribute for site. The degree to which the field and its view corridors are preserved may impact the value of developable residential property.

**MARKETING OPPORTUNITIES**

- Synergistic marketing opportunity for James Island. Coordinate marketing effort with development at Dill Property and James Island County Park.
- Anticipate annual attendance of approximately 75,000 visitors, $4.00 average admission fee. (charging higher fees to adults, lower fees for children, school groups)
- Attendees will include locals (including school groups) as well as visitors to Charleston area.

SOURCE: Robert Charles Lesser & Co.

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**Residents Association of James Island**
Joan Sooy

**National Trust for Historic Preservation, Southern Field Office**
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**Soil Conservation Service, U. S. Department of Agriculture**
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**Eloise Pope**
Current resident of property

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