

RESPONSE TO REQUEST FOR PROPOSAL

Submitted by:

BATTLE OF FRANKLIN — TRUST —

Learn how the Civil War redefined America.



Proposer:

**The Battle of Franklin Trust
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Table of Contents

Cover Letter	4
Statement of Purpose	5
Project Team	8
Organizational Chart	12
Relevant Project Experience	13
Revenue and Expense	15
Last Remarks	17
References	20

Cover Letter

On behalf of the Board of Directors of The Battle of Franklin Trust, let me express our appreciation and excitement for the opportunity to respond to your Request for Proposal to perform Management and Operations Services for Historic Rippavilla.

I often ask myself to define just what makes a historic site so important to preserve. Is it the grounds upon which so many thousands of soldiers and leaders fought, suffered, and died which we preserve and protect for future generations? Is it the historical homes and structures that we preciously maintain to allow our guests to personally experience life and livelihood as it was in the 19th century? Is it the pictures and artifacts that find their home in historic structures such as Rippavilla? Could it be the skilled presentation of the stories and fact-based narrative surrounding the people and events which defined this complex period in our history and its aftermath? Or is it a combination of all of the above, which enables our guests to explore the continuing relevance of the American saga during the formative years of our nation.

We, at The Battle of Franklin Trust, firmly believe that we have the talent and experience, the tools and resources, and the vital relationships to maximize the value and importance of sites such as Rippavilla, particularly in this time of expansive dialogue and transformational work throughout the field of historical preservation and interpretation.

We hope we are able to convey our enthusiasm and commitment to this unique opportunity through the attached materials and look forward to your consideration.

Sincerely yours,

Gary Rosenthal
Chairman, The Battle of Franklin Trust

Statement of Purpose

The Battle of Franklin Trust, Inc., a Tennessee 501c3 corporation, (hereafter referred to as the BOFT) was created in the summer of 2009 to manage the Carter House and Carnton, located in Franklin, Tennessee. Both historic sites had been managed for many years by the Carter House Association and Carnton Association, which were also 501c3 entities. In 2015 the Carter House and Carnton non-profits were merged into the BOFT.

The initial focus in 2009 was to allow full collaboration between the two sites most directly affected by the Battle of Franklin, which occurred on November 30, 1864. Rather than two boards, two interpretive plans, two marketing plans, two staffs, and two directors, it was determined that uniting all business elements and employees under one banner would allow a uniformity that was otherwise impossible. Cost saving measures were immediately apparent as was a consistency in messaging, interpretation, and branding. Most importantly, it allowed guests, both local and from across the country, to enjoy a seamless experience.

The BOFT took over management of both sites on November 1, 2009. In the years that followed, attendance at Carter House nearly doubled, from roughly 20,000 visitors per year to almost 40,000. Carnton's attendance, which was almost twice that of Carter House when the BOFT was created, saw an increase of over twenty-five percent, from about 40,000 to over 50,000. Most importantly, revenue derived strictly from tourism, i.e. tour tickets, increased from about \$600,000 annually to over \$1.1 million. Gift shop revenue increased comparably and is now nearly \$250,000 annually. Meanwhile, expenses were consolidated and managed in such a way that the BOFT was not only self-sustaining, but it has been profitable since its inception. This has allowed the organization to build substantial cash reserves, invest in needed capital projects, increase staff to over 30 full and part-time employees, offer healthcare benefits, as well as grow and manage two endowment funds.

In addition, the BOFT has worked closely with the City of Franklin, the State of Tennessee, the Tennessee Historical Commission, the Williamson County Convention and Visitors Bureau, the American Battlefield Trust, the African American Heritage Society, the Heritage Foundation of Williamson County, and the Civil War Trails Program to save and reclaim battlefield property, interpret that property, build a unified tourism experience, tell a Fuller Story in the Franklin town square, and help tourists from across the United States and abroad understand how and why the Civil War redefined America.

Statement of Purpose

It is our belief that the events of November 29, 1864, in and around Spring Hill, and which eventually coalesced around Rippavilla, are inextricably tied to the events of November 30, 1864 and those which consumed Carter House and Carnton. It is our belief that the pre-war stories at all three sites, and in both Spring Hill and Franklin, are part of the very fabric of the United States. The stories of the families that lived there - white and black, enslaved and free - and the social and political conditions that pulled everyone into a maelstrom that few could have ever imagined are as important to understand today as ever.

We must continue to confront how the politics of slavery tore the country apart and how the American Civil War nearly destroyed our experiment in democracy. We must be honest with guests about the violence and horrors of our civil war and use historic sites like Rippavilla, along with Carter House and Carnton, as places to learn and places to educate. They are places to come face-to-face with our past to better understand not only our present, but what our future might be.

The time for romantic interpretation and experiences has passed, especially at sites where slavery, war, and family tragedies unfolded. Heritage tourists are desirous of an honest accounting of the mid-19th century. They want to know why our history matters. They want to know why places like Rippavilla, Carter House, and Carnton matter. They want to know the truth.

Nearly a decade ago we commemorated the 150th anniversary of the Civil War. Known as the Sesquicentennial, many thought it would be the high-water mark of heritage tourism. We believed otherwise. We believed it was a chance at a new beginning. The numbers of visitors who have come to Franklin since 2014, which was the 150th anniversary of the Battles of Spring Hill and Franklin, bear out the fact that tourism numbers are only increasing.

In 2026, just five years from now, we will be commemorating the 250th anniversary of the Declaration of Independence. In the years to come we have a collective opportunity to teach visitors the truly remarkable nature of our American experiment. It will be an opportunity to earnestly reckon with our past, provide objectivity and clarity, and be honestly inclusive. Between 1861 and 1865 the very core of the Declaration, that “all men are created equal,” was put to its greatest test. In the end over 700,000 Americans died, nearly 4 million were freed, and the President was assassinated. We have been picking up the pieces ever since.

Statement of Purpose

Rippavilla, the Battle of Spring Hill, the Cheairs family, the enslaved, and the tortured paths of Reconstruction and Jim Crow all predate us. The stories, the land itself, and the physical structures, will endure and outlive all of us. There is an opportunity to connect all of what is historically important at Rippavilla, in Spring Hill, and in Maury County. There is now an opportunity to connect it, under one banner, and create a broad and vigorous interpretive theme that connects to Franklin and to the history of the United States. The beneficiaries will be those who visit, and who will care little about who owns the property or who manages it. They will benefit because of what they can see and what they can learn, and what they will take home with them. It must resonate in their hearts and in their minds. For some those experiences, those that stick with them, are the basis of philanthropy. Such people, in the long run, will be Rippavilla's greatest asset.

We hope to be able to elevate Rippavilla and make it a place where countless people can learn about the events of late November 1864, but also why the American Civil War remains relevant, and why history belongs to all of us.

Thank you.

Eric A. Jacobson
Chief Executive Officer, The Battle of Franklin Trust

Project Team

Eric A. Jacobson **CEO**

As Chief Executive Officer of The Battle of Franklin Trust (BOFT), Eric oversaw the creation of the organization in 2009. He helped to successfully bring together two historic homes and sites – Carnton and the Carter House – and oversaw the final merger in 2015. Through partnerships with City of Franklin, the American Battlefield Trust, Franklin’s Charge, the Williamson County Convention and Visitors Bureau, the Tennessee Historical Commission, the Tennessee Civil War Heritage Area, the African American Heritage Society, and the Civil War Trails Program, Eric has been part of a heritage tourism and economic development project that has transformed Franklin. Most recently he partnered with constituents in the Franklin community, as well as the City of Franklin, to create the Fuller Story project in the town’s public square.

Eric has strived to accomplish three primary goals while in Franklin. First, to help people understand why the Civil War is vitally important today and how the war itself redefined America. Second, to build the groundwork for the most unique Civil War experience in the country. Third, to create a new non-profit culture - one that promotes calculated growth, sustainability, and regular profitability.

As a student of the American Civil War since the early 1980s he has authored three books - *For Cause & For Country: A Study of the Affair at Spring Hill & the Battle of Franklin*, *Baptism of Fire: the 44th Missouri, 175th Ohio, and 183rd Ohio at the Battle of Franklin*, and *The McGavock Confederate Cemetery*. He worked for nearly two decades to elevate the stories about Spring Hill and Franklin to their appropriate place in history.

Project Team

Joanna K. Stephens **Curator**

As Curator of the BOFT, Joanna helped to facilitate the merger of the Carter House and Carnton. Her efforts at Carter House in particular have been extensive. In late 2009 she began to reorganize and catalog a collection that was over fifty years old and had never been effectively managed, inventoried, or insured. During her tenure with the BOFT, Joanna has managed the artifact and archival collections connected to both sites, worked to acquire new artifacts, directed numerous object conservation projects, and supervised small and large-scale repairs and restorations on the historic structures, including the Carter House farm office and the Carnton springhouse. One of her finest achievements was the conservation of the McGavock Cemetery book, which is one of the most unique and prized Civil War artifacts in the nation.

Joanna has created and designed over twenty exhibits in the past decade, including a wide-ranging Sesquicentennial exhibit at Carnton. She also brought to life a digital learning experience which can be found at www.boft.org/learn. For many years she was editor of the BOFT's quarterly magazine, *The Dispatch*. She has also worked closely with the CEO, staff, and various consultants to ensure that daily interpretation is complete and accurate.

Joanna has a BA degree in History, minor in German, Magna Cum Laude, Berea College, Berea, KY.

Project Team

Laurie S. McPeak **Chief Development Officer**

Since Laurie joined the BOFT in early 2014 she has created and built a development program to help the stories of the Battle of Franklin, the Carter and McGavock families, and the enslaved, as well as a broader scope of American history, to connect with private, public, and corporate dollars. This philanthropic infusion of capital helps the BOFT more completely fulfill its mission. By recognizing how supporters wish to engage – whether as a member, donor, or both – and identifying other sources of revenue, the BOFT has expanded its annual philanthropic totals by over 200%. Laurie has also designed a very successful grant writing program. Her grant successes in 2020 were critically important. She has proven that the term “fundraising” is mostly an antiquated approach for historic sites. True growth in donor dollars is about implementing a broad-based, well-planned, and long-term development program.

Prior to joining the BOFT, Laurie spent 11 years in sales and marketing in the for-profit healthcare industry, and then 15 years in development for a large nonprofit national university beginning with their first \$1 billion capital campaign. She worked directly with Vanderbilt University’s Capital Campaign efforts. Her efforts included major gift work for one of the institutions ten colleges and leading internal institution campaigns for greater than 24,000 employees. During her last seven years Laurie helped to rebuild and manage the University’s annual giving office.

Laurie holds a BBA in Marketing from Belmont University, Nashville, TN.

Project Team

Brad C. Kinnison

Production and Design Manager

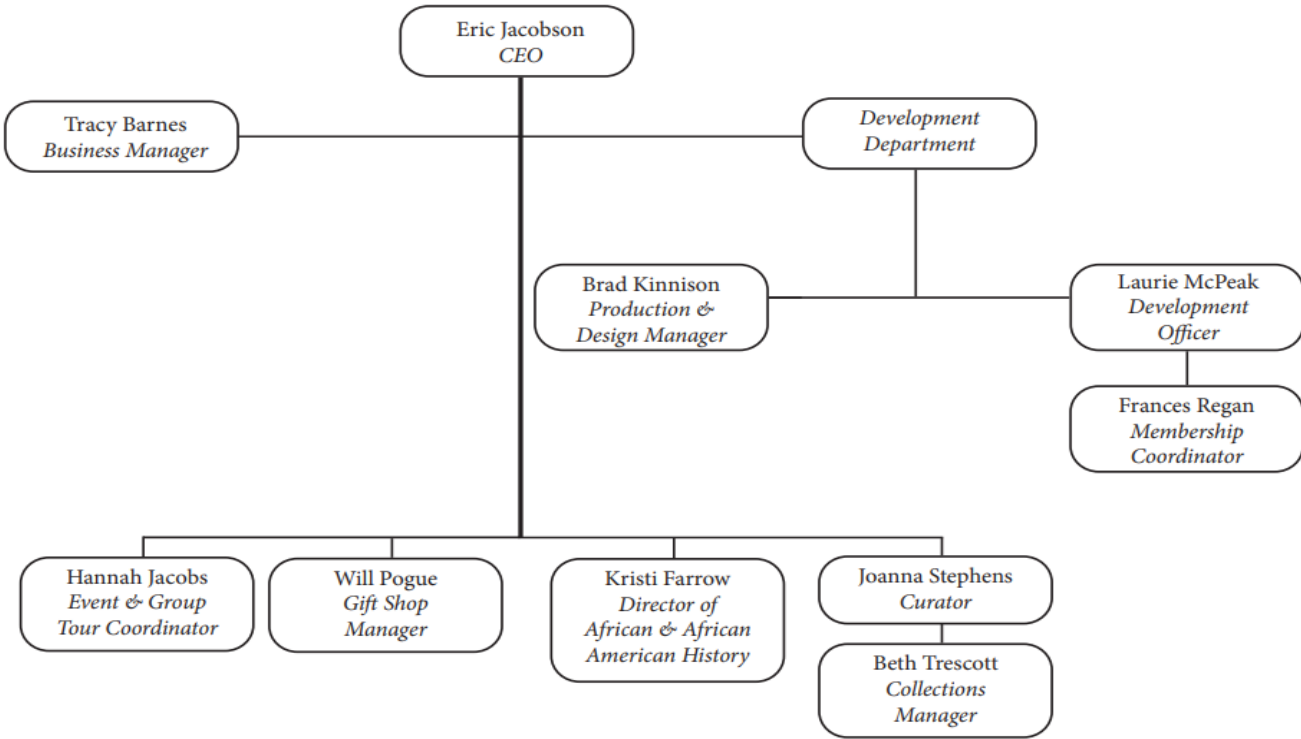
Brad has worked for the BOFT in various positions since 2015. He was originally hired as an Historical Interpreter and gave tours of Carter House, Carnton, and the Franklin and Spring Hill battlefields to countless visitors. Over the years he also led several, day-long tours for large groups of members and donors.

Since the summer of 2019, Brad has been the Production and Design Manager, and oversees multiple creative projects that are utilized for marketing and educational purposes. These projects include designing and editing the BOFT's quarterly magazine, *The Dispatch*, which is sent out to all members and donors. Brad produces, edits, and hosts TENN in 20: Official Podcast of the Battle of Franklin Trust, which has covered many different subjects over the past two years. He designs the BOFT printed and web advertisements, tour tickets, site brochures, and manages multiple social media accounts. Brad also designs and maintains the BOFT website - www.boft.org.

Brad recently designed a museum exhibit entitled "Roots and Wings: From Slavery to Freedom on the Family Tree," which tells the story of enslaved families and their descendants. It is currently on display at Carnton. He has also designed a new museum exhibit, entitled "Lasting Legacies: The Cause, The Lost Cause, & The Noble Cause," which is soon to be installed at the Carter House.

Brad has a BA degree from Trevecca Nazarene University in Nashville, TN and has digital marketing experience in the music industry.

Organizational Chart



Relevant Project Experience

When the BOFT began to manage both Carter House and Carnton in 2009, it was readily apparent there were many projects that needed to be undertaken and some with pressing necessities. We had to immediately prioritize what needed to be done, what could be done, what costs would be, and what could be delayed. In over a decade of managing the two sites slightly more than \$1 million has been spent to improve, restore, and repair the historic buildings and both visitor centers as well as improve the guest experience. Almost all the money was cash generated by the BOFT, and did not come from grants, state, or federal funds. The full and complete project list is rather extensive. To date we have completed over 500 individual projects. What follows are some of the major site improvements and accomplishments, which are primary examples of Relevant Project Experience. But first and foremost, tours top the list of project experience. Nothing is more important than the history we relate and the stories we tell – seven days a week and 360 days a year.

Also included are two charts which show revenue and expenses on a percentage basis over the past two fiscal years.

Our goals at Rippavilla, both short-term and long-term, would be similar. We are fully prepared to begin an immediate assessment of what needs to be done, not only to protect the historic structures, but to improve guest experiences and their opportunities from the onset. In the end, what will matter most is what we can relate to guests every single day. Every opportunity and every successful project will stem from a robust base of visitors. Our experiences and results bear out such an approach.

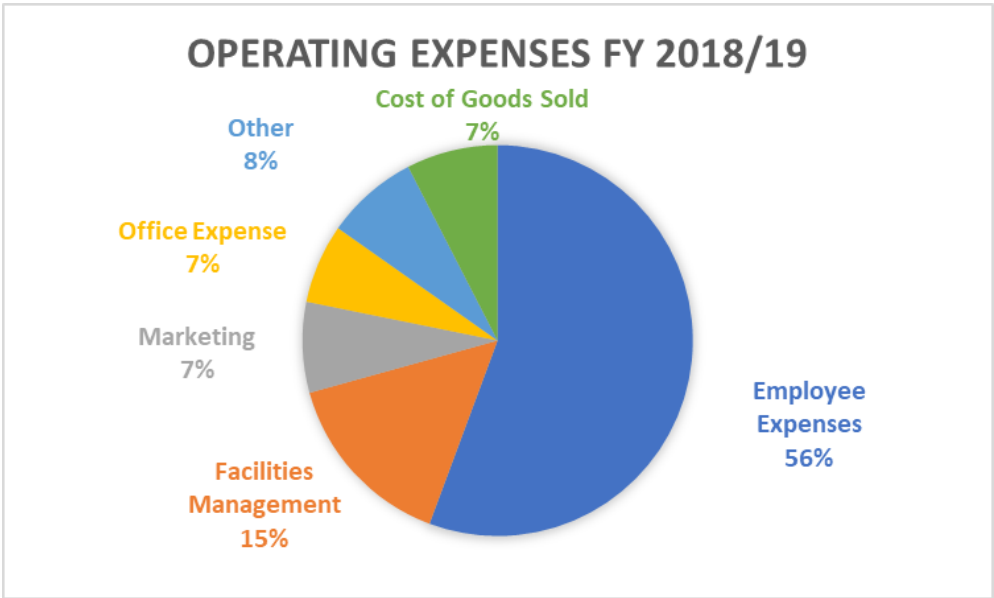
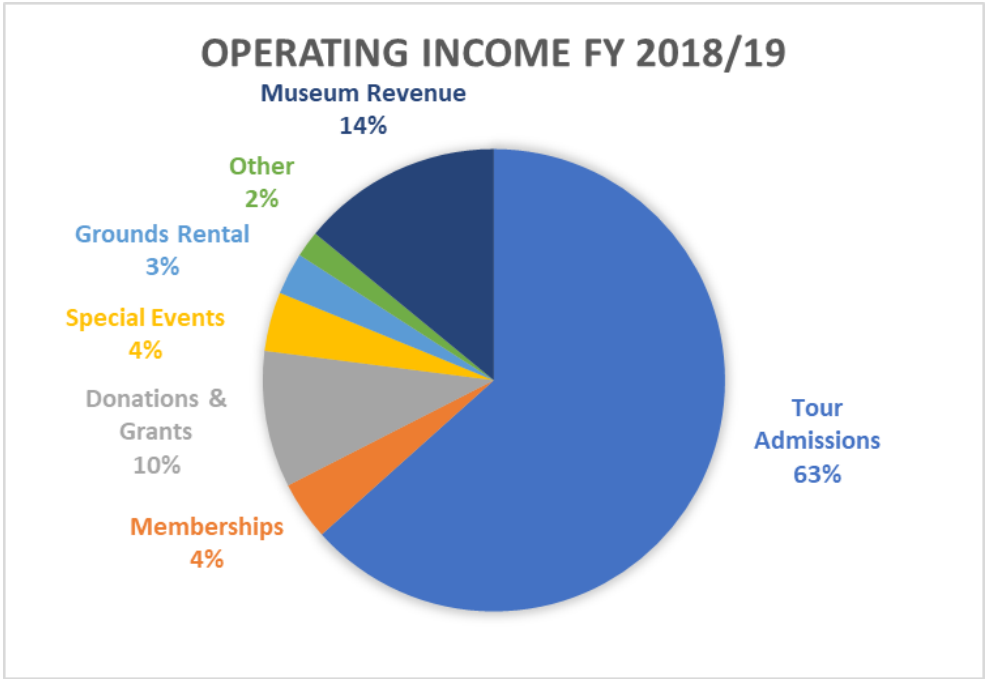
Our current commitments are solely day-to-day site management and the completion of projects already underway, such as The Fuller Story. There is nothing in which we are engaged that would prevent us from providing Rippavilla with the attention and focus it deserves.

We are also familiar with the Master Plan that was recently completed for Rippavilla on behalf of the City of Spring Hill. We look forward to working with the City on the plan to determine what is best for Rippavilla now and in the future.

Relevant Project Experience

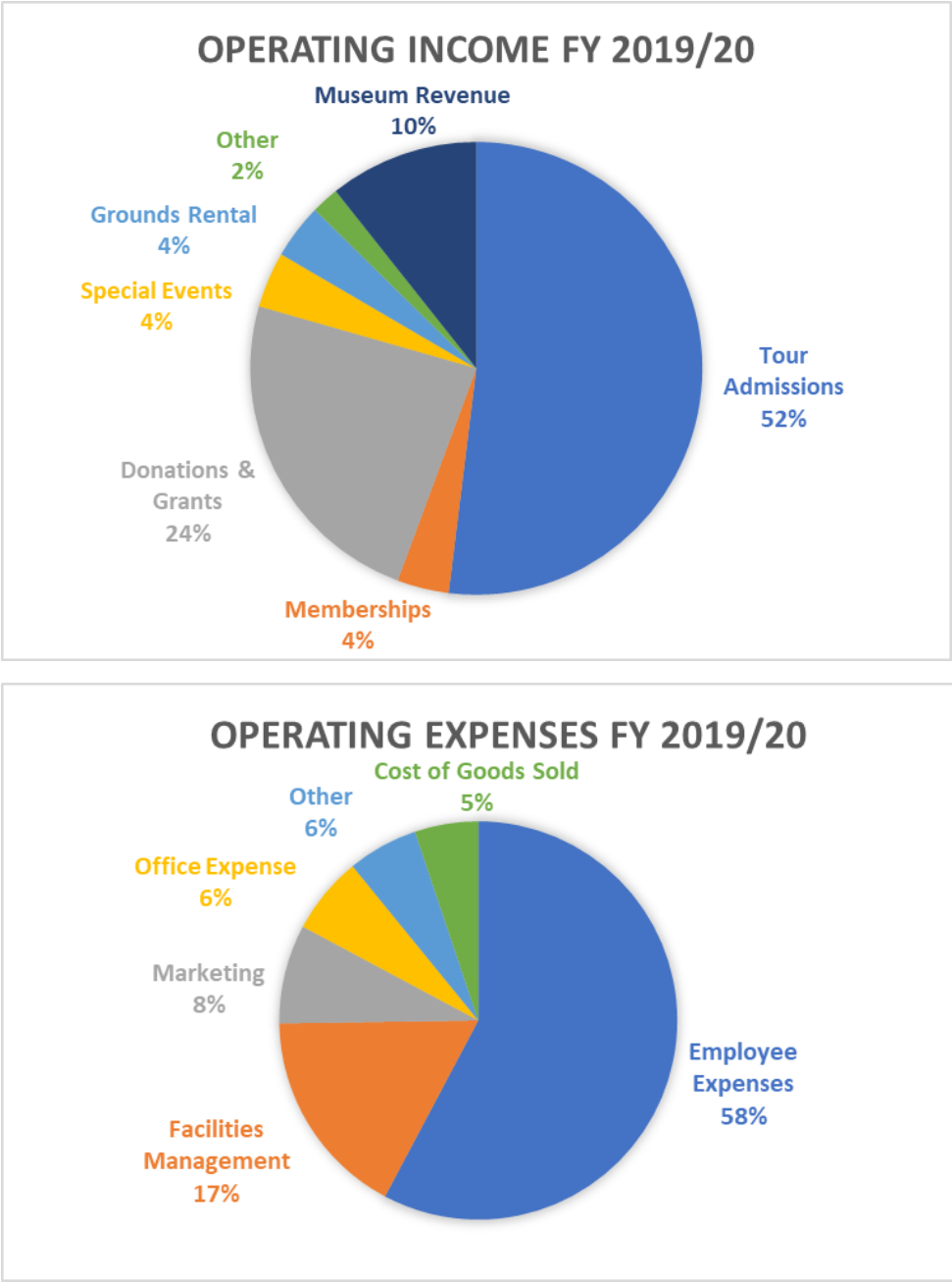
- Provided tours to over 800,000 guests since 2010
- Worked with various organizations to save roughly 150 acres of the Franklin battlefield at a cost of \$18 million
- Helped to draft text for over thirty interpretive signs on the Franklin battlefield
- Helped to draft text for three signs on the Spring Hill battlefield
- Helped to raise money and install four replica artillery pieces and a caisson depicting the 1st Kentucky Light Artillery at Carter Hill Park
- Installed 19th century fencing at Carter House and Carter Hill Park
- Oversaw three archaeological digs at Carter Hill Park
- Repaired the flood damaged springhouse at Carnton
- Restored the Carter House farm office
- Launched a full restoration of the historic columns and porches at Carnton
- Installed period appropriate carpet and floorcloth in the Carter House
- Secured the donations of various items that belonged to Tod Carter
- Secured the donation of various letters, photos, furniture, and books belonging to the Carters and McGavocks
- Inventoried over 850 collection items belonging to Carter House and Carnton that had not been processed prior to the BOFT
- Added over 1,000 collection items since 2009
- Installed HVAC (climate control) in the Carter House
- Worked with the Tennessee Historical Commission to secure \$3.2 million for a new Carter House visitor center
- Republished Jacob Cox's book *The Battle of Franklin*
- Created guidebooks for Carter House and for Carnton
- Created a long-range interpretive plan
- Created a Battle of Franklin endowment to protect historic structures and purchase battlefield property
- Worked with the City of Franklin on the Fuller Story project
- Employed over 100 people from Middle Tennessee
- Launch the *TENN in 20* podcast series
- Created *The Dispatch*, the BOFT's quarterly magazine
- Launched a soldiers database on the BOFT website
- Developed and released a documentary entitled *The Battle of Franklin & The American Experiment* via BOFT Films

Income and Expenses



More financial data available at Giving Matters.com (<https://givingmatters.civicore.com/battleoffranklin1864>)

Income and Expenses



Last Remarks

On November 29, 1864 one of the most controversial and misunderstood events of the American Civil War unfolded just south of Spring Hill. The Battle of Spring Hill was an event that haunted and intrigued the minds of countless people for decades. Two months after the battle, Confederate Maj. Gen. William Bate wrote of his actions that afternoon in his official report. In part, he said, "...learning the exact locality of the enemy and the general direction of the turnpike, I changed direction to the right again and was moving so as to strike the turnpike to the right of Maj. Nat. Cheer's (sic) residence..."

Some of Bate's men came within about 100 yards of the Columbia Turnpike, now US Highway 31, to "the right," or north of the Cheairs home – Rippavilla. Before blocking the road, which was their goal, the Rebel troops were pulled back and a cascading series of errors on the Confederate side allowed the US troops an opportunity to escape. For hours that evening, between nightfall and just past midnight, some 20,000 Federal troops moved north up the turnpike. They slipped past the unsuspecting Confederate army, marched into Spring Hill, pushed on to Thompson's Station, and headed for Franklin. Just before dawn the last Federal troops, a division that had been engaged in combat, had held the town for most of the afternoon, and was centered on another home – that of Martin Cheairs – slowly pulled out and headed north to Franklin. The escape was nearly complete.

Early on the morning of November 30, 1864, John Bell Hood stopped briefly at Rippavilla and met with at least one, and perhaps two, of his chief subordinates. The meeting was brief and to the point. Mistakes had been made and an immediate pursuit was soon ordered. Late that afternoon, in the waning light of a beautiful autumn day, bloodshed, tragedy, bravery, and horrors engulfed the town of Franklin. The genesis of the nightmare had been at Spring Hill.

Until the early 20th century the Battle of Spring Hill was regularly discussed in the pages of publications such as *Confederate Veteran* and the *National Tribune*. But once the veterans were gone, the remembrance of Spring Hill soon faded. To be fair, the same fate plagued Franklin, but the catastrophic losses there were not so easy to ignore. By the time of the Centennial of the Civil War, the Battle of Spring Hill barely existed. Stories of nefarious Confederate actions so clouded the actual events that the actions of the Federal troops and commanders were almost wholly ignored. Going further, it was contested by the 1980s and 1990s whether there was ever a battle. Newspaper accounts from as late as 2000 claimed that Spring Hill natives "knew" there had never been a battle. Of course, in their minds such was the case because the history had been buried, covered up, and neglected.

Last Remarks

Much has changed in the past 20-30 years. Rippavilla has been open to the public for over two decades and nearly 200 acres of the battlefield have been saved. And yes, there was indeed a battle. It was short, but very intense, and some 600-700 men were killed, wounded, and captured during the fighting on November 29, 1864.

It is time to tell the story of what happened that day. It is time to make that story the focal point of day-to-day activities. Rippavilla and the 200 acres of battlefield, especially the nearly 90 acres directly to the north, over which some of William Bate's men marched, are hollow and barren without life breathed into them. Millions of dollars have been spent to preserve these pieces of our shared American history and it is time to leverage these tremendous assets.

The BOFT tells the story of the Battle of Franklin every day and on every tour. However, that is not all we do. We offer Battlefield Tours, Extended Tours, Behind the Scenes Tours, and Slavery and the Enslaved Tours. We sell grounds passes to those who have limited time or are not interested in a guided tour. The same model can be utilized at Rippavilla. The story of what happened on November 29, 1864 will draw the largest number of tourists. However, specialty tours allow people to explore other areas of history. Those other stories are not only as important as the Battle of Spring Hill, but they are key to a better understanding of why there was an American Civil War and why its results and the ensuing decades impact us today.

Chief among those stories are those about slavery, but also of the enslaved. It is key to focus not solely on the institution and numerical data but, when possible, emphasize the people who were enslaved. A story that must be told is that of three enslaved men who escaped Rippavilla and became soldiers in the United States Army and served in a USCT unit. Two of them fought at the Battle of Nashville, and quite literally were fighting for their own freedom, but also to defend the United States of America. There is power and resonance in that story.

The Cheairs family, like the Carters and McGavocks in Franklin, did not live in a vacuum. Residents of Williamson County and Maury County were acutely aware of what was brewing in the 1850s. Tennessee found itself torn between secessionists that many did not trust and Northerners and abolitionists that many despised. What better place to discuss slavery and why there was a Civil War than at a place where slavery existed and where the war was fought. In the most profound of ways Rippavilla, like Carter House and Carnton, is a classroom.

Last Remarks

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Perhaps the most underappreciated period of our history is Reconstruction. A lack of sound teaching, especially at historic sites, is a paramount reason why the period is so misunderstood. Today, many view Reconstruction as a failure, when in truth the black community saw some of the first real steps toward progress. The Constitution was amended three times, the first Civil Rights bill was passed, and Freedmen's Bureau schools were opened across the South. But when Reconstruction ended the progress was slowly rolled back. Rippavilla was witness to it all. The Cheairs family, like everyone in the area, saw the ripple effects of the war and its result.

The stories that can be told at Rippavilla, and on the battlefield, naturally and historically fit with the stories told in Franklin. We are confident the BOFT methodology matches that which is carefully outlined in the report produced by the Tennessee Civil War National Heritage Area entitled *Rippavilla: Telling the Whole Story of the Civil War Experience*.

We are confident that the time is right to put the pieces of the overall story together. When discussions about the BOFT began in 2008 some questioned the wisdom of merging Carter House and Carnton. Some of us asked if the two sites had merged decades earlier would anyone seriously consider pulling them apart in 2008 or 2009? Of course, the answer was no. The same question can be asked of Rippavilla. If we join the stories of Spring Hill and Franklin - if Rippavilla takes its rightful place alongside Carter House and Carnton - can anyone seriously question such logic 20-30 years from now?

Middle Tennessee is growing and the base of local support from Franklin, Thompson's Station, Spring Hill, and Columbia is only going to increase. National heritage tourism remains very vibrant and those visitors, who come from all fifty states and abroad, will visit Spring Hill if the opportunity is right. The annual economic impact created by those who visit Carter House and Carnton is estimated to be \$30-\$35 million. Imagine the possibilities of forging a genuine bond between the historic sites, but also between Spring Hill and Franklin, as well as Columbia, and between Maury County and Williamson County.

We believe there is one chance to make this happen. Now is that time. If we miss this opportunity there will not be another like it. We have a chance to create the most unique Civil War experience in America and put Spring Hill and Franklin on the national stage, where they have always belonged.

The Battle of Franklin Trust

References

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