

MUSEUMS IN PERIL: AN EXPLORATION OF THE EFFECTS OF NEOLIBERALISM ON
HISTORY MUSEUMS IN NORTH CAROLINA, 1980-2020.

by

Shelby A. Dains

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Approved by:

Dr. Mark Wilson

Dr. Willie J. Griffin

Dr. Joanne G. Carman

ABSTRACT

SHELBY A. DAINS. *Museums in Peril: An Exploration of the Effects of Neoliberalism on History Museums in North Carolina, 1980-2020.* (Under the direction of DR. MARK WILSON).

Museums in the United States first witnessed the effects of neoliberalism during Ronald Reagan's presidency, when he worked with Congress to impose unprecedented budget cuts on the NEH. However, these economic practices have since trickled down to the state level. Using North Carolina as a case study, I argue that neoliberal influenced policies have had disastrous effects on all museums, but furthermore that they have been particularly unremunerative for history museums. My argument centers on the idea that since neoliberalism mainly benefits private for-profit businesses, which the overwhelming number of history museums are not, that museum funding issues are overlooked in national, state, and many local government budgets. I propose that the general defunding of cultural institutions, an outcome of neoliberal influenced economic policies, causes history museums to increasingly rely on their ability to gather private and corporate funds, lower their budgets to reduce expenditures on programming and staff, incorporate commercial products and experiences, and increase public marketing efforts. This cycle then compounds when funders reduce monetary contributions due to perceived underperformance, which typically occurs as a result of initial underfunding to begin with. The future and longevity of history museums may be at risk if funding models remain on this unorthodox trajectory and if traditional sources of funding continue to disregard the many societal benefits that well-funded history museums provide.

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DEDICATION

I dedicate this thesis to public history practitioners in North Carolina and across the United States. May we work together to defend the institutions that are near to our hearts, and which provide unquantifiable value to our society.

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INTRODUCTION

On the 29th of March, 2023, the *Gaston Gazette* reported that during a recent Budget Strategy Session a number of Gaston County officials proposed defunding their local history museum.¹ Critics of the Gaston County Museum of Art and History argued that the almost \$900,000 the County spent on the museum's staff, operating costs, and maintenance during 2022 would be more useful if it were reallocated to other budget items. County Commissioners Chad Brown and Tom Keigher especially emphasized the museum's low annual rate of attendance, which measures in at around 6,000 in-person visitors per year according to one recent study.² Commissioner Keigher even went on to question the museum's value to local children. "How many of those [visitors]," he asked, "... are little second, third graders who aren't comprehending what they're going to see really?"³ Commissioner Brown later stated that defunding the museum would allow for the County to reduce expenditures in light of rising property taxes: "it's probably going to be the biggest tax cut Gaston County has ever had."⁴ Part of the issue the commissioners have with the museum is that it takes funds from the County but does not produce any profit: "We don't own the building," said Brown, "We don't get any return on investment."⁵

¹ Kara Fohner, "Gaston County Considering Defunding History Museum," *Gaston Gazette*, March 29, 2023, <https://www.gastongazette.com/story/news/local/2023/03/29/gaston-county-considering-defunding-history-museum/70060994007/>.

² Gaston County's FY 2023 adopted budget contradicts the statement that the museum only garnered 6,000 yearly visitors. In fact, the performance data from the *FY 2023 Adopted Budget* listed that the museum garnered 11,751 visitors (including in-person and online attendance) during the FY 2022, which represents an increase of 317%, as seen in Gaston County Budget and Strategy Department, Gaston County Board of Commissioners, *FY 2023 Adopted Budget*, February 22, 2022, 120, <https://www.gastongov.com/DocumentCenter/View/3221/FY-2023-Adopted-Budget-PDF>.

³ Fohner, "Gaston County Considering Defunding History Museum."

⁴ *WSOC-TV 9* News Staff, "Museum Officials Worry Possible Loss of Funding is Connected to Controversial Exhibit," *WSOC-TV 9*, March 29, 2023, <https://www.wsoc.tv.com/news/local/museum-officials-worry-possible-loss-funding-is-connected-controversial-exhibit/PV5Q7CWXINFM5EZDR234JDYYEI/>.

⁵ *WSOCTV.com* News Staff, "Museum Officials Worry Possible Loss of Funding is Connected to Controversial Exhibit."

The movement to defund the museum came after a controversy in the summer of 2022 in which County Manager Kim Eagle forced the museum to remove two photos from their gallery, one of two gay men kissing during a pride parade and one of a woman being arrested after protesting a confederate statue in the County. Both Eagle and Kim Norwood, the chair of the museum's Board of Trustees, claimed that the pictures did not cause the current debate over funding, seeing as Eagle ordered a review of the museum in the spring of 2022, well before the debacle occurred. However, Norwood did indicate that the controversy may have provided impetus for the County to "take a deeper look" at the museum's appropriations. Though some affiliates of the museum implied that the County's rulership has stifled the museum's growth, Norwood stated that the museum "never asked to be independent from the County." In fact, museum representatives repeatedly stated that if the County did withdraw their monetary support, the museum would not be able to sustain themselves as a nonprofit and would be forced to permanently close their doors. "It would be like the end of Gaston County history," said Norwood of the situation, "because that's where it is."⁶

Many of the museum's board members ardently rejected the County's proposed defunding initiative and the argument that the museum is "a waste of taxpayer dollars."⁷ In defense of their stance, board members proclaimed that the museum deserves their funding because the exhibits and programming they offer are an intrinsically valuable source of community education.⁸ As Norwood pointed out, the museum is not only the County's largest repository of local history and artwork, it also provides educational programs, such as field trips for nearby schools, virtually accessible exhibits, community events, graduate level internships,

⁶ Fohner, "Gaston County Considering Defunding History Museum."

⁷ Fohner, "Gaston County Considering Defunding History Museum."

⁸ WSOC-TV.com News Staff, "Museum Officials Worry Possible Loss of Funding is Connected to Controversial Exhibit."

local jobs, and “manages the Historic Preservation Commission, which conducts studies on potential historical sites at no cost to property owners.”⁹ The museum even helped to organize the 2023 North Carolina Museum’s Council Annual Conference in Gastonia, North Carolina, from which they received two awards for excellence, one for photography and one for their equity, diversity, and inclusion efforts.¹⁰ Though representatives of the museum produced strong evidence that the County’s appropriations have enabled them to be a significant cultural and historical community resource, many of the Commissioners did not agree that the public value of the museum was worth further economic expense.

Due to the increase in funding crises like those in Gaston County, I set out to explore the extent to which a broader shift toward neoliberal influenced policies has affected funding at history museums in North Carolina. I found that the movement to defund history museums is not limited to Gaston County, or even North Carolina, but has in fact become an increasingly common occurrence in the United States ever since neoliberal ideology rose to prominence during the 1980s. The distinguished economic theorist David Harvey defined neoliberal political ideology as “political economic practices that propose that human well-being can best be advanced by liberating individual entrepreneurial freedoms and skills within an institutional framework characterized by strong private property rights, free markets, and free trade.”¹¹ Neoliberalism arose as a political-economic practice in the 1970s, but became a major international political ideology in the 1980s. World leaders such as the United States’ President Ronald Reagan, the United Kingdom’s Prime Minister Margaret Thatcher, and the People’s

⁹ Fohner, “Gaston County Considering Defunding History Museum.”

¹⁰ Fohner, “Gaston County Considering Defunding History Museum;” “2023 NCMC Annual Conference Registration is Now Open!” The North Carolina Museums Council, accessed April 2, 2023, <https://www.ncmuseums.org/2023-conference-registration>.

¹¹ David A. Harvey, *A Brief History of Neoliberalism* (Oxford: Oxford University Press, 2007), 2.

Republic of China's paramount leader Deng Xiaoping used neoliberal ideology to guide economic policy in their countries.¹² These policies often worked to the detriment of cultural institutions, which are traditionally conceptualized as public or charitable organizations that preserve and promote culture for the betterment of society. Though societal 'greater good' is a foundational tenet of neoliberalism, free markets are often only oriented towards the social and cultural welfare of citizens so long as it is profitable. While businesses in the private sector have largely benefitted from the acceptance of neoliberal ideology, cultural institutions like history museums have suffered because they were not traditionally organized to generate profit. The onset of neoliberal ideology has changed this tradition and, in doing so, exacerbated financial crises at history museums across the country.

Before the mid-twentieth century, funding models at museums were developed around private and individual philanthropic donors. During the New Deal era, federal support for the arts and humanities increased with certain WPA projects. These projects provided precedent for the creation of the National Endowment for the Arts and Humanities (NEA and NEH) in 1965, which subsidized many cultural institutions and encouraged state governments and other organizations to become more involved in funding. On the federal level, this era of heightened government involvement lasted until the 1980s when funding models shifted yet again.¹³ Museums in the United States first witnessed the effects of neoliberalism during Ronald Reagan's presidency, when he worked with Congress to impose unprecedented budget cuts on the NEH. However, these economic practices have since trickled down to the state level. Using

¹² Harvey, *A Brief History of Neoliberalism*, 1-5, 67.

¹³ The National Endowment for the Arts and Humanities can trace its roots back to Federal Project Number One and its five sub-projects, the Federal Art Project, the Federal Music Project, the Federal Theatre Project, the Federal Writers' Project, and the Historical Records Survey, as seen in Cynthia Koch, "The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis," in *Funding Challenges and Successes in Arts Education*, eds. Siu Challons-Lipton and Richard Emanuel (Hershey, PA: IGI Global, 2017), <https://www.upenn.edu/static/pnc/ptkoch.html>.

North Carolina as a case study, I argue that neoliberal influenced policies have had disastrous effects on all museums, but furthermore that they have been particularly unremunerative for history museums.

My argument centers on the idea that since neoliberalism mainly benefits private for-profit businesses, which the overwhelming number of history museums are not, that museum funding issues are overlooked in national, state, and many local government budgets. I propose that the general defunding of cultural institutions, an outcome of neoliberal influenced economic policies, causes history museums to increasingly rely on their ability to gather private and corporate funds, lower their budgets to reduce expenditures on programming, exhibits, and staff, incorporate commercial products and experiences, and increase public marketing efforts. This cycle then compounds when funders reduce monetary contributions due to perceived underperformance, which typically occurs as a result of initial underfunding to begin with.

Over the course of the neoliberal era, which I henceforth establish as lasting from the 1980s to the present day, there have been three consequential periods for funding at North Carolina's history museums; the early 1980s, the mid to late 1990s, and 2010 to the present day. After the first two periods, funding recovered and even exceeded previous levels, but since 2010 revenue at history museums, especially that which stems from the State Government, has been stagnant. In response, history museums have had to shift models of funding away from government assistance and towards a motley assemblage of nontraditional sources. Many of the museums that managed to survive the neoliberal era have done so despite the exhaustive effects of underfunding on programming, exhibit content, and staff. A select few museums have managed to thrive, but many of those institutions have heartily embraced commercialization and commodification, which comes with an array of ethical concerns for the historical integrity of

such institutions. Others still have found pockets of paradise with funders in local governments that did not follow the lead of state politicians. Perhaps the most significant, and harrowing, outcome of the neoliberal era is that the history museum is waning, both in funding and perceived societal value.

The importance of this research is directly connected to the importance of history museums themselves. As Italian historian Randolph Starn suggested, since “history museums and historic sites account for two of every three museums in [the United States],” and are “the most accessible and widespread museum type,” then it should come as no surprise that, “museums actually deliver more history, more effectively, and more of the time, to more people than historians do.”¹⁴ The prevalence of history museums as centers of preservation, resources for their communities, and trusted educators of the public only makes research on shifts in funding models that much more important.¹⁵ It is crucial that history museums be able to explicitly identify the political and economic forces that harm them in order to overcome or at least mitigate financial crises. The future and longevity of history museums may be at risk if funding models remain on this unorthodox trajectory and if traditional sources of funding continue to disregard the many societal benefits that well-funded history museums provide.

DATA ON MUSEUM FUNDING FROM THE INSTITUTE OF MUSEUM AND LIBRARY SERVICES

¹⁴ Randolph Starn, “A Historian’s Brief Guide to New Museum Studies,” *The American Historical Review* 110, no. 1 (2005): 68.

¹⁵ Here I define a funding model: a funding model is an institutionalized approach to funding that is characterized by the combination of revenue sources and the methods used to generate revenue. Funding models are typically organized around the source or sources of revenue that are the most prominent or lucrative, such as public or private dollars.

IMLS Sources of Support for all Museums (2006)

TABLE 1: Institute of Museum and Library Services “Sources of Support for all Museums (2006)”¹⁶

Table IV.3. Sources of Support for All Museums in Sample, by Type, FY 2006

Museum Type	Source of Support				N
	Private	Earned	Investment	Government	
Art Museums	23.3%	46.1%	17.5%	13.1%	129
Children's Museums	24.4%	48.1%	20.5%	6.9%	41
History Museums	32.9%	21.6%	13.2%	33.2%	235
Natural History and Natural Science	29.5%	41.6%	5.7%	23.6%	39
Science and Technology Museums	22.8%	42.8%	4.0%	30.4%	41
Historical Societies	32.2%	21.5%	24.7%	21.6%	132
Arboretums and Botanical Gardens	34.1%	28.9%	13.7%	23.3%	29
Zoos, Aquariums and Zoological Societies	17.4%	60.3%	4.2%	18.1%	39
Hybrid and Other	27.2%	38.5%	9.6%	27.5%	48
Overall	24.4%	43.7%	12.2%	19.7%	733

Source: Urban Institute analysis, IMLS Museum Public Finance Survey, 2008.

In 2008 the Institute of Museum and Library Services (IMLS) published *Exhibiting Public Value*, which analyzed funding sources at museums in the United States from 2000 to 2006. The study found that history museums often underperform financially in comparison to other types of museums. For example, though science and technology museums and history museums received similar proportions of their funding from government entities, at 30.4% and 33.2%, respectively, the amount of public dollars the two types of museums received were profoundly different.¹⁷ While science and technology museums garnered a median amount of \$289,970 in combined government dollars, history museums secured a mere \$32,182.¹⁸ In addition, history museums and historical societies earned the least amount of total revenue compared to other types of museums, at a median amount of \$230,000 and \$153,630, respectively.¹⁹ In contrast, art museums earned a median total revenue of \$1,233,924; science

¹⁶ Urban Institute Analysis, *Sources of Support for All Museums in Sample, by Type, FY 2006*, table, in Carlos Manjarrez, Carole Rosenstein, Celeste Colgan, and Erica Pastore, *Exhibiting Public Value: Government Funding for Museums in the United States* (Washington, DC: Institute of Museum and Library Services, 2008), 26.

¹⁷ These percentages include federal, state, and local government funding combined.

¹⁸ Manjarrez et al., *Exhibiting Public Value: Government Funding for Museums in the United States*, 8.

¹⁹ Earned income consists of money museums made through entrance fees, events, gift shops, or other sales.

and technology museums earned a median total revenue of \$2,218,977; natural history and natural science museums earned a median total revenue of \$1,327,608, and children's museums earned a median total revenue of \$1,154,321.²⁰ This data suggests that history museums not only received less government support than other types of museums, but also that they failed to compete with other types of museums in terms of income they were able to generate.

Public attendance rates, however, at least partially contradict the funding deficits between history museums and other types of museums. While overall attendance rates at history museums have declined over the last thirty years, data from the mid-2000s revealed that history museums generated comparable attendance rates to other types of museums.²¹ In 2006, American adults (persons over the age of eighteen) made in-person visits to museums a total of 272 million times.²² Though museums at historic houses and sites were the most visited, at 77 million in-person visits, history museums ranked sixth out of eleven, at 53 million. These amounts can be compared to the 58 million adults who visited science or technology museums and the 67 million who visited art museums. Museums with fewer attendees than history museums were specialized museums at 40 million, children's museums at 44 million, natural history or anthropological museums at 45 million, and general museums at 46 million.²³ Even though history museums are around the middle of the pack in terms of attendance, it is still true that large and even famous historical attractions and museums have seen significant losses in recent years. For example, between 2000 and 2004 Mount Vernon's attendance dropped 28%, while Colonial

²⁰ Manjarrez et al., *Exhibiting Public Value*, 25.

²¹ Cary Carson, "The End of History Museums: What's Plan B?" *The Public Historian* 30, no. 4 (2008): 11.

²² José-Marie Griffiths and Donald W. King, *InterConnections: The IMLS National Study on the Use of Libraries, Museums, and the Internet, Museum Survey Results* (Washington, DC: University of North Carolina at Chapel Hill and University of Pittsburgh for the Institute of Museum and Library Services, 2006), 12, <http://interconnectionsreport.org/reports/IMLSMusRpt20080312kjm.pdf>.

²³ Griffiths and King, *InterConnections*, 31.

Williamsburg's dropped 18%, and Monticello's dropped 15%.²⁴ These two data sets reveal that while overall attendance at history museums has declined, they still receive more yearly visits on average than many other types of museums.

These statistics pose an interesting dilemma: though history museums garnered significantly less funding from the government and earned less total revenue than some other types of museums, they still only received moderately fewer in-person visits. The lack of research to explain these trends is alarming. Since 2008, no government agency has consistently tracked or published data on museum attendance or funding at the national level.²⁵ Currently, the IMLS is working to produce a renewed museum survey, which they plan to conduct during the summer of 2023 and release at a later date.²⁶ However, this represents a fifteen-year gap in which museums were left with no financial data on the national level and no metrics by which to compare their institution to those around the country. As a result, museum scholars and historians have had to perform major amounts of guesswork to evaluate the overall status of museum funding and performance. Though the IMLS reports from 2006 and 2008 suggest that the United States government underfunds and undervalues its history museums in comparison to other types of museums, as of now there is no current data to elaborate on those findings.

A BRIEF HISTORIOGRAPHY

The historiography on museum funding poses yet another problem: historians and museums professionals cannot agree on why history museums are failing, both in funds and

²⁴ Carson, "The End of History Museums," 11.

²⁵ Carson, "The End of History Museums," 11.

²⁶ "IMLS Announces New Pilot Survey of American Museums," The Institute of Museum and Library Services, April 28, 2022, <https://www.imls.gov/news/imls-announces-new-pilot-survey-american-museums>.

attendance.²⁷ Scholars can, however, agree that the societal role of museums shifted over the course of the 20th century. In *Museums: In Search of a Usable Future* (1970) historian and museum scholar Alma Wittlin argued that the function of museums transitioned from collections-oriented research institutions for academics and wealthy persons to public institutions geared toward mass education and acculturation.²⁸ Furthermore, in 1989 American historians Leon Warren and Roy Rosenzweig edited a collection of essays titled *History Museums in the United States: A Critical Assessment*, which recorded the development of history museums in the United States and assessed the problems that they faced. Warren and Rosenzweig mirror Wittlin's claim that history museums began to disseminate history to the public on a larger scale during the 20th century. In addition, they found that increased public interest caused history museums to emphasize social history in order to relate to and attract a layman audience.²⁹ These historians captured how museums changed to better accommodate a general, non-elite, and non-academic audience. However, they published their work before contemporary museum funding and its neoliberal origins were well established, and therefore they did not consider how these factors affected overarching changes in history museums.

Historians and museum experts such as Wittlin, Warren, and Rosenzweig have noted the changing environment that museums must navigate to survive. However, scholarly analyses of history museums remain woefully underdeveloped, perhaps due to the vast funding inequalities between history museums and other types of museums.³⁰ Thus, to get a sense of the chronology of museum funding in the United States, one must look to experts on other types of museums. In

²⁷ Carson, "The End of History Museums," 11-12.

²⁸ Alma S. Wittlin, *Museums: In Search of a Usable Future* (Cambridge, MA: MIT Press, 1970).

²⁹ Warren Leon and Roy Rosenzweig, *History Museums in the United States: A Critical Assessment* (Urbana: University of Illinois Press, 1989).

³⁰ Manjarrez et al., *Exhibiting Public Value*, 8.

Museums and Money (1996), sociologist and art historian Victoria D. Alexander used financial records from thirty large art museums in the United States between 1960 and 1986 to map the evolution of the funding landscape in the last half of the twentieth century. She found that from 1960 to 1966 most museums received the majority of their funding from private philanthropic donors. However, in the late 1960s a transitional period occurred, and models of funding began to shift. Between 1968 to 1972 museums began to rely on institutional funders, such as corporations, government, and foundations, over private philanthropic donors. Between 1974 to 1986 this shift became entrenched: from this point onward most of the funding for art museums stemmed from institutional funders. Alexander argued that when art museums changed the source of their funding it triggered new ideological approaches to museum programming that moved away from acquisition of art, conservation, and connoisseurship and towards combating art elitism, attracting more diverse audiences, and increasing exhibit production.³¹

Since there is no comparable body of financial data on funding at history museums like Alexander's study on art museums, it is useful to look at how museum scholars and historians have assessed the economic factors that affect history museums. In "From Being About Something to Being for Somebody" (1999), Stephen Weil argued that during the late twentieth and early twenty-first century museums became increasingly geared towards marketization. He posits that in order to keep up with competing institutions and secure corporate funding, museums transitioned from selling their content and products to marketing to their visitors, which entails finding out the public's demands and meeting those needs. This happens when museums have to rely on earned income— whether from ticket sales, gift shops, or other auxiliary

³¹ Victoria D. Alexander, *Museums and Money: The Impact of Funding on Exhibitions, Scholarship, and Management* (Bloomington: Indiana University Press, 1996).

services— rather than funds from government or philanthropic organizations.³² Since government funding decreased during the neoliberal era, marketization became an important strategy to mitigate those losses.

In *The Ellis Island Snow Globe* (2005), Erica Rand also discussed the marketization of museums but did so through analyzing the commodification of The Ellis Island National Museum of Immigration. Rand contrasted the heroic, heteronormative, nuclear, and racially homogeneous depictions of immigrants in the museum with immigrant histories that do not conform to the museum's narrative. These are stories like Frank Woodhull's, a masculine-presenting immigrant who was criticized by the media and almost denied entry to the United States on the basis that he had obscured his given sex.³³ Rand pointed to the commercialization of the site as a leading cause of the lack of representation for untraditional immigrant histories. The interviews that Rand conducted with employees at the museum and the National Park Service indicated that The Statue of Liberty-Ellis Island Foundation, the museum's governing body, "raised money to keep itself in business rather than to support the monuments."³⁴ Weil and Rand found that increased marketization, commodification, and commercialization led to conditions in museums that were more compatible with selling products and experiences than portraying accurate histories. However, these works did not explicitly identify why these factors exist in the first place or how larger political and socio-economic conditions have contributed to these changes.

³² Stephen E. Weil, "From Being about Something to Being for Somebody: The Ongoing Transformation of the American Museum," *Daedalus* 128, no. 3 (1999): 229–258.

³³ Erica Rand, *The Ellis Island Snow Globe* (Durham, NC: Duke University Press, 2005), 68-69.

³⁴ Rand, *The Ellis Island Snow Globe*, 154.

Despite the lack of fiscal research on overall funding trends, the fact that many museums have faced or are currently facing financial crises has not gone unnoticed within the museum community. In fact, several museum scholars and museum-oriented organizations have produced self-help guides to combat the rise of financial peril. Notable among these funding guides are Denise Wallen and Karen Cantrell's, *Funding for Museums, Archives, and Special Collections* (1988), the American Association of Museum's *Slaying the Financial Dragon* (2003), and Neil, Philip, and Wendy Kotler's *Museum Strategy and Marketing* (2008).³⁵ Advice in these guides ranges from best practices to increase grant procurement to the ways that museums can enhance technology use in order to improve their marketing, programming, and attendance. Regardless of their solutions, these guides typically framed deficits in funding as a problem that affects museums on an individual basis. Furthermore, they relied on the idea that museums can and should fix funding issues through creative marketing or fundraising endeavors, which organizations can use to improve grant acquisition, corporate support, or any number of different funding opportunities. The integral problem with this perspective is that these guides were not written to solve the current system of neoliberal influenced policy that bogs down museum finances, especially at history museums. Of course, no authors could ever hope to solve the external and overarching problems that have been decades in the making with a single publication. However, it is overwhelmingly evident that guides to better funding for museums typically only tackle the symptoms of systemic issues, and not the systemic issues themselves.

³⁵ Denise Wallen and Karen Cantrell, *Funding for Museums, Archives, and Special Collections* (Phoenix, AZ: Oryx Press, 1988); American Association of Museums, *Slaying the Financial Dragon: Strategies for Museums* (Washington, DC: American Association of Museums, 2003); Neil G. Kotler, Philip Kotler, and Wendy I. Kotler, *Museum Marketing and Strategy: Designing Missions, Building Audiences, Generating Revenue and Resources* (Hoboken, NJ: John Wiley & Sons, 2008).

Karin M. Ekström's edited collection of essays, *Museum Marketization: Cultural Institutions in the Neoliberal Era* (2020), is the sole sustained analysis of how neoliberalism has affected museums. Like Weil and Rand, Ekström focused on the marketization of museums, but, unlike other authors, Ekström looked to ideology to explain changes in funding models. She found that since the 1980s, neoliberal ideology has increasingly contributed to the marketization of society and changed the roles of government in museums. Over the course of the neoliberal era museums have become more market oriented, which reduced government roles in museum management and funding and contributed to the privatization and deregulation of museums.³⁶ In "Reflections on the Marketization of Art in Contemporary Neoliberal Capitalism," Eräranta, Moisander, and Penttilä argued that the effect of neoliberal governance on museums is most evident in changes to funding. Both private and public funders now expect museums to identify market needs so as to generate more public value and become more profitable, to adapt their programming to cater to diverse target audiences, and to demonstrate that they have various streams of income; in other words, to show that they are not overly reliant on government funds. In doing so, museums became more like private-sector businesses than traditional cultural institutions, dominated by the "all-powerful consumer-customer."³⁷ While Ekström and her accompanying authors were well versed at identifying the effects of neoliberalism on museums, they did not offer much quantitative research. In this paper, I explore funding at North Carolina's history museums over the course of the neoliberal era by combining insights from Ekström's

³⁶ Karin M. Ekström, *Museum Marketization: Cultural Institutions in the Neoliberal Era* (Abingdon; Oxford: Routledge, 2020).

³⁷ Kirsi Eräranta, Johanna Moisander, and Visa Penttilä, "Reflections on the Marketization of Art in Contemporary Neoliberal Capitalism" in *Museum Marketization: Cultural Institutions in the Neoliberal Era*, ed. Karin M. Ekström (Abingdon; Oxford: Routledge, 2020), 27.

analysis of how neoliberalism has affected museums with the kind of quantitative data that Alexander generated in her analysis.

Despite Alexander and Ekström's shortcomings, their work points to yet another discrepancy in museum historiography. Clearly museum scholars and historians concerned with art museums have conducted analyses on the effects of neoliberal influenced governance, policy, and economics far more than their counterparts at history museums.³⁸ In fact, apart from Ekström, there is a distinct lack of scholars who have seen the problems that history museums face, especially with their funding, as having any relationship with neoliberalism. However, it is undeniable that the state of the economy and economic political ideologies affects the financial health of all cultural institutions. Moreover, it is certainly evident that neoliberal ideology has had a long lasting and prominent influence on politics in the United States, such that many historians and economists refer to the 'neoliberal era' as stretching from the late 1970s or early 1980s to the current day.³⁹ Therefore, it is vital to understand the history of neoliberalism and how its effects contribute to the overall decline of the history museum.

AN OVERVIEW OF "MUSEUMS IN PERIL"

The first chapter, "History for Sale: Neoliberalism and the Transformation of the History Museum in NC (1980-2020)," covers the development of neoliberalism in the United States in

³⁸ See Rina Kundu and Nadine M. Kalin, "Participating in the Neoliberal Art Museum," *Studies in Art Education* 57, no. 1 (2015): 39-52; Victoria D. Alexander, "Enterprise Culture and the Arts: Neoliberal Values and British art institutions," in *Art and the Challenge of Markets Volume I: National Cultural Politics and the Challenges of Marketization and Globalization*, eds. Victoria D. Alexander, Samuli Hägg, Simo Häyrynen, and Erkki Sevänen (Cham: Springer International Publishing, 2018), 67-93; J. Keri Cronin and Kirsty Robertson, "Titanium Motherships of the New Economy: Museums, Neoliberalism, and Resistance," in *Imagining Resistance: Visual Culture and Activism in Canada* (Waterloo: Wilfrid Laurier University Press, 2011).

³⁹ See David A. Harvey, *A Brief History of Neoliberalism*; Daniel Stedman Jones, *Masters of the Universe: Hayek, Friedman, and the Birth of Neoliberal Politics* (Princeton: Princeton University Press, 2012); Julie MacLeavy, Kean Birch, and Simon Springer, *Handbook of Neoliberalism* (London: Routledge, 2016).

relation to cultural institutions and the history of museum funding in North Carolina. This chapter includes analysis of fiscal data sourced from the yearly financial documents of twenty history museums, including thirteen nonprofit museums and seven state-owned museums, as well as questionnaire responses from eight museum employees. In addition to covering those museums that experience financial peril, the chapter also reveals how certain museums have found success during the neoliberal era through commercialization and commodification. This chapter argues that neoliberal influenced policies on the national and state levels caused a shift in funding models that have resulted in chronic underfunding at the majority of North Carolina's history museums.

The second chapter, "From Public, to Private, to Gone: How Systems of Funding Shape Financial Success and Failure at History Museums," engages with the effects of underfunding at the micro-level through case studies on three history museums in North Carolina, all of which use different funding systems.⁴⁰ The findings come from interviews conducted with three executive directors, one each from the Wilmington Railroad Museum (nonprofit), Tryon Palace (state-owned), and the City of Raleigh Museum (municipal). This chapter argues that the effects of underfunding are most evident at nonprofit museums even though they are the conventional funding system throughout the state. However, the chapter also identifies the ways that neoliberal influenced policy affects museums even when it does not result in defunding or

⁴⁰ Here I define the three systems of funding: the term nonprofit museum applies to any museum that's governing body fits the definition of a nonprofit set out by the Internal Revenue Code Section 501(c)(3) and is registered as such with the Internal Revenue Service. A state-owned museum is a museum owned and managed by a state government that receives yearly appropriations via legislation passed in that state's legislature. A municipal museum is a museum owned and managed by a town, city, county, or sovereign nation that also receives yearly appropriations from that corresponding government entity.

underfunding. These three case studies indicate that neoliberal ideology has influenced museums regardless of if they experience financial peril.

The final chapter, “The Future of the History Museum,” offers solutions to mitigate museum funding issues in a neoliberal capitalist economy based on the above research findings. Most of the suggestions come directly from museum employees themselves, many of whom have worked in the museum industry in North Carolina for over a decade. I also discuss my struggles with finding willing participants, which indicates that discourse on underfunding is highly policed among museum administrators and funders, as well as potential avenues for further research. The paper ends with a discussion of the future of the history museum during and after the COVID-19 Recession.

“Museums in Peril” illuminates the effects of neoliberalism on history museums in North Carolina and thereby confronts the overarching systemic issues in museum funding across the United States. The research looks at funding on a state-wide level and over a forty-year period, which broadens the scope of how museum funding can be studied, discussed, and, hopefully, mitigated. Furthermore, this work contributes to a historiography that many museum scholars and historians have overlooked in favor of addressing short-term and individualistic solutions to funding issues. The purpose of “Museums in Peril” is to engage museum scholars, historians, and all those concerned with the state of history museums in a wider conversation about the dire effects of neoliberal influenced policy and how the systemic issues they cause can be identified and resolved.

CHAPTER ONE

HISTORY FOR SALE: NEOLIBERALISM AND THE TRANSFORMATION OF THE HISTORY MUSEUM IN NC (1980-2020)

“Council wary of funding museum vote,” “Sit-in museum owes \$933,155 in loan repayment by 2018,” and “Duke Energy may turn out the lights at Greensboro’s Civil Rights Museum,” are among some of the headlines that newspapers in North Carolina ran about the International Civil Rights Center & Museum (ICRCM) from between when it opened in 2010 and 2017.⁴¹ In fact, the museum’s financial troubles have regularly attracted such critical media attention in North Carolina’s newspapers.⁴² However, CEO and Director John L. Swaine claimed that close-fisted corporate donors and discriminatory political backlash, rather than mismanagement, were to blame for the museum’s precarious finances. Perhaps the most prominent example of this is the museum’s relationship with Duke Energy, a multi-billion-dollar corporation headquartered in Charlotte, NC. Though ICRCM had already paid the company “over \$1.2 million for service[s]” by 2017, the two still disagreed “when it [came] to making sizable donations to the institution.” Swaine postulated that part of ICRCM’s problem is that

⁴¹ Nancy McLaughlin, “Council Wary of Funding Museum Vote,” *Greensboro News & Record*, August 22, 2013, A1; Margaret Moffett, “City: Sit-in Museum Owes \$933,155 in Loan Repayment by 2018,” *Greensboro News & Record*, July 15, 2016, https://greensboro.com/news/local_news/city-sit-in-museum-owes-in-loan-repayment-by/article_852d9aa6-82fc-5030-9121-652f60266dd7.html; John Murawski, “Duke Energy May Turn Out the Lights at Greensboro’s Civil Rights Museum,” *News & Observer, The Web Edition Articles*, May 10, 2017, <https://infoweb-newsbank-com.eu1.proxy.openathens.net/apps/news/document-view?p=AWNB&docref=news/164511F6483CFE58>.

⁴² For more concerning headlines about the ICRCM, see Jasmine Spencer, “Audit Reports Debt and Loss for Civil Rights Museum; Director Disagrees,” FOX8 WGHP, July 29, 2015, <https://infoweb-newsbank-com.eu1.proxy.openathens.net/apps/news/document-view?p=AWNB&docref=news/156E7D92DBFFF800>; Jessica Mensch, “Greensboro Civil Rights Museum Owes \$57K in Property Taxes,” WFMY News 2, March 7, 2016, <https://www.wfmynews2.com/article/news/local/greensboro-civil-rights-museum-owes-57k-in-property-taxes/83-72517501>; Cash Michaels, “Museum Files Complaint Against Duke Energy,” *The Winston-Salem Chronicle*, April 27, 2017, <https://wschronicle.com/museum-files-complaint-duke-energy/>; Erica Stapleton, “International Civil Rights Museum and Duke Energy Reach Agreement in Billing Dispute,” WFMY News 2, August 3, 2017, <https://www.wfmynews2.com/article/news/local/international-civil-rights-museum-and-duke-energy-reach-agreement-in-billing-dispute/83-461664855>.

North Carolina's corporate community gives "large amounts of support to some similarly situated museums, and not others."⁴³ In addition to complicated donor-museum relationships, the museum has also received significant political criticism. Over the years an array of local politicians questioned the museum's viability, and some have even suggested that the organization move out of their central downtown location or transfer ownership over to the city.⁴⁴ Unfortunately, the ICRCM's funding hardships offer only limited insight into the larger systemic issues that plague cultural institutions in the United States.

The increasing dominance of neoliberal influenced economic policies, starting from the 1980s onwards, have been significant in the trend to defund and underfund cultural institutions like history museums. These policies not only encourage museums to operate more like private-sector businesses that focus on generating capital and diversifying their streams of income, but they also influence the quality of content and staffing at history museums. Under this system some history museums in North Carolina are thriving, notable among them being the Biltmore Estate and Old Salem Museum and Gardens. These institutions have successfully commodified the experience of the history museum and market not only their historical content but also a range of commercial products and experiences to their visitors. However, the situation is dramatically different for the vast majority of North Carolina's history museums. Those that have failed to embrace the neoliberal model are forced to scrape by on the succor of the corporate community, receding state and local government funds, private donations, grants, and the scant amount of earned income that they can generate on their own. Donors and museum leadership often view the funding systems at 'successful' museums as goal worthy. In

⁴³ Cash Michaels, "Civil Rights Museum Chief Promises to Overcome," *The Winston-Salem Chronicle*, January 5, 2017, <https://wschronicle.com/civil-rights-museum-chief-promises-overcome/>.

⁴⁴ Cash Michaels, "Civil Rights Museum Chief Promises to Overcome."

comparison, the funding at ‘unsuccessful’ museums is meager, their content is considered dated, and the salaries they offer are uncompetitive. Within the neoliberal model, the ‘unsuccessful’ history museum is seen not as an intrinsically valuable repository of knowledge and understanding, but as an economic and historical burden on the free market in need of large-scale reform.

REAGAN, THE NEH, AND THE DOWNFALL OF THE HISTORY MUSEUM

To better understand the history of museum funding it is important to revisit the political and economic origins of the current funding landscape. In 1967, when President Lyndon B. Johnson asked the Federal Council on the Arts and Humanities to determine the “unmet needs” of America’s museums, the Council focused on securing more financial support from the Federal Government.⁴⁵ Johnson soon met the Council’s requests. Federal appropriations to the NEH, the Federal Government’s main method of distributing funds to non-federally owned museums, increased throughout the 1970s. The federal funding that flowed through the NEH resulted in more prominent humanities-based cultural institutions on both the national and local level and encouraged a more diverse audience base to visit these institutions.⁴⁶ During Fiscal Year (FY) 1980, the NEH reached its peak federal appropriations at \$472.24 million dollars (2022 USD).⁴⁷ This era of government involvement influenced museums to make overarching changes to their missions, content, and funding models. To attract a more general audience, museums transitioned from being large repositories of artifacts for wealthy patrons and research-oriented academics to

⁴⁵ Alma S. Wittlin, *Museums: In Search of a Usable Future*, 188.

⁴⁶ Koch, “The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis.”

⁴⁷ American Academy of Arts and Science, *IV-01a: National Endowment for the Humanities Appropriation, Nominal and After Inflation Adjustment, Fiscal Years 1966–2023*, line graph, January 26, 2023, <https://www.amacad.org/humanities-indicators/funding-and-research/national-endowment-humanities-neh-funding-levels#31737>; For non-inflation adjusted appropriations, see “NEH Appropriations History,” National Endowment for the Humanities, last modified 2022, <https://www.neh.gov/neh-appropriations-history>.

public institutions geared toward mass education and enculturation.⁴⁸ This populist revolution, which the NEH incentivized with its grant programs, encouraged museums to reorient their funding priorities.⁴⁹ Instead of relying on wealthy individual private donors, museums looked to generate new monetary relationships with mostly government funders, but also private funders as well.⁵⁰

However, the Federal Government's support for museums dissipated significantly in the last two decades of the twentieth century. From 1981 onwards, the Reagan administration and Congress' adherence to neoliberal ideology led to overarching changes in the nation's economic policies. Unlike the previous two decades, which saw increased federal support for regulatory agencies, social insurance programs, and cultural institutions, the economic policies of the 1980s sought to limit the Federal Government's involvement in all of the above.⁵¹ In his first year itself, Reagan created the Presidential Task Force on the Arts and the Humanities to increase private support for the arts and humanities and decrease the Federal Government's intervention into cultural institutions.⁵² The task force created a committee of thirty-two members to advise the President, which included representatives from notable arts, theater, and music groups, as well as libraries, multiple university presidents, and many corporate executives ranging from Standard Oil to Hanes Corporation.⁵³ Despite its diversity, the committee only had two members from art

⁴⁸ Wittlin, *Museums: In Search of a Usable Future*.

⁴⁹ Warren Leon and Roy Rosenzweig, *History Museums in the United States*, 27.

⁵⁰ Alexander, *Museums and Money*.

⁵¹ Joel W. Johnson, *Political Economy of the United States* (London: Routledge, 2018), 116.

⁵² Ronald Reagan, "Executive Order 12308, Presidential Task Force on the Arts and Humanities," June 5, 1981, *Ronald Reagan Presidential Library and Museums*, accessed November 6, 2022, <https://www.reaganlibrary.gov/archives/speech/executive-order-appointment-presidential-task-force-arts-humanities-june-5-1981>.

⁵³ Barnabas McHenry, "Notes on the Presidential Task Force on the Arts and Humanities and the President's Committee on the Arts and Humanities," *The Annals of the American Academy of Political and Social Science* 471 (1984): 108.

museums and none from history museums.⁵⁴ In general, the task force favored federal funding for the arts and humanities. They encouraged Reagan to improve the current system to generate more private funds and grant matching programs *and* continue to supplement the arts and humanities with federal funding.⁵⁵ Some of Reagan's contemporaries alleged that the President had planned to eliminate the NEA and NEH altogether, but the committee's conclusion that these programs were integral to the social and cultural health of the country convinced him otherwise.⁵⁶ Though the NEA and NEH survived Reagan, he did not heed all of the committee's wishes.

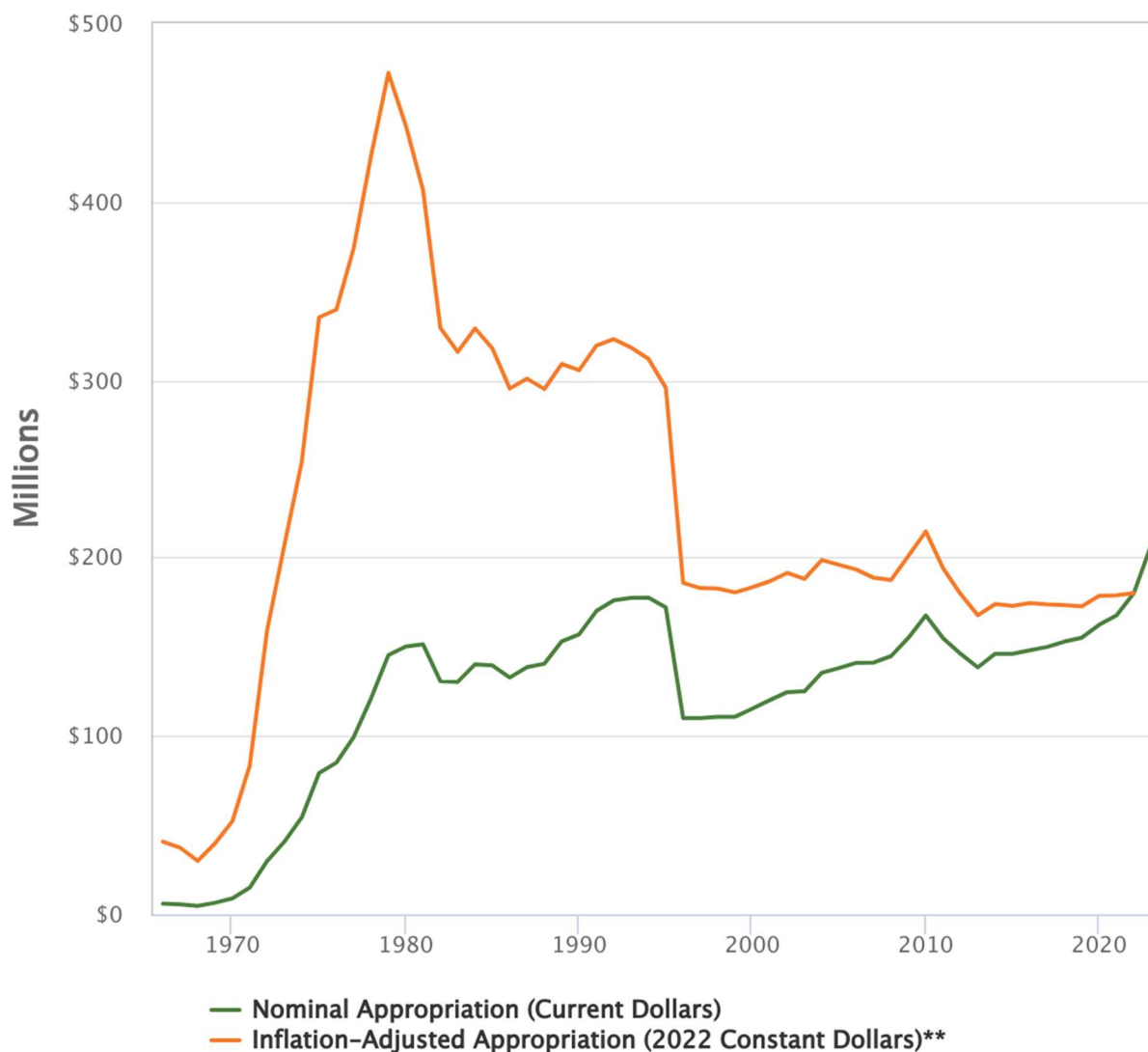
⁵⁴ Reagan, "Executive Order 12308, Presidential Task Force on the Arts and Humanities."

⁵⁵ McHenry, "Notes on the Presidential Task Force on the Arts and Humanities and President's Committee on the Arts and Humanities," 109.

⁵⁶ Livingston Biddle, *Our Government and the Arts: A Perspective from the Inside* (New York: ACA Books, 1988), 496, 505-506.

IV-01a: National Endowment for the Humanities Appropriation*

Nominal and after Inflation Adjustment, Fiscal Years 1966–2023



This appropriation trend excludes supplemental COVID relief appropriations. The agency received \$75 million in FY 2020 under the CARES Act. It received \$135 for FY 2021 under the American Rescue Plan Act.

Humanities Indicators, 2023|American Academy of Arts & Sciences

Figure 1: “National Endowment for the Humanities (NEH) Funding Levels.” This figure denotes appropriations to the NEH in inflation adjusted 2022 USD.⁵⁷

⁵⁷ American Academy of Arts and Science, *IV-01a: National Endowment for the Humanities Appropriation, Nominal and After Inflation Adjustment, Fiscal Years 1966–2023*, line graph, January 26, 2023, <https://www.amacad.org/humanities-indicators/funding-and-research/national-endowment-humanities-neh-funding-levels#31737>.

During FY 1981 Reagan proposed a federal budget that would decrease federal spending on a plethora of government agencies, including the NEA and NEH. Arts and humanities advocates, including many politicians and notable celebrities, did not accept the budget quietly. In fact, their protests, which included marches, Congressional testimonies, and the threat of a class-action lawsuit against the President's administration, helped to quell any proposed overhauls to the NEH system.⁵⁸ However, Reagan was committed to decreasing federal involvement in and appropriations for the arts and humanities despite the backlash he incurred. This is because his administration believed that the previous endowment system promoted "the notion that the Federal Government should be the financial patron of first resort for both individuals and institutions engaged in artistic [, cultural,] and literary endeavors."⁵⁹ The first budget cuts in FY 1981 were relatively minor, but the second budget cuts in FY 1982 were severe. In 1982, Congress approved a federal budget that included a 14% reduction to NEH's appropriations, from \$151,299,000 to \$130,560,000.⁶⁰ Between FYs 1982 and 1988 federal appropriations to the NEH teetered between \$130 million and \$140 million. The agency did not reach pre-Reagan amounts of funding until FY 1989, by which time inflation rates had taken their toll. Over the course of the 1980s, the NEH saw their appropriations cut approximately 50% in real dollar value.⁶¹

Unfortunately, attacks on federal funding for the arts and humanities did not end with Reagan but continued on into the 1990s. Under the Clinton administration the Democratic Party

⁵⁸ Koch, "The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis."

⁵⁹ In the final budget document, Reagan's budget committee changed "literary endeavors" to "cultural endeavors," of which Biddle commented that someone must have explained that "'literary endeavors' did not precisely describe the work of the Humanities Endowment," Biddle, *Our Government and the Arts: A Perspective from the Inside*, 492, 494.

⁶⁰ "NEH Appropriations History," National Endowment for the Humanities, last modified 2022, <https://www.neh.gov/neh-appropriations-history>.

⁶¹ Koch, "The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis."

embraced certain neoliberal influenced economic policies, such as the North American Free Trade Agreement. This development marked an uneven, but nonetheless significant, shift towards neoliberal political ideology in both major political parties. The influence of neoliberalism became even more profound in 1994, when the Republican Party gained a majority in Congress for the first time in forty years and for the first time since the founding of the NEH. This conservative group of Republicans embraced neoliberal ideology even more readily than their Democratic counterparts.⁶² This is most evident in the 1996 federal budget, which resulted in major cuts to domestic spending. Like Reagan, many conservatives in Congress wanted to privatize the NEH and proposed cutting all federal funds to the agency.⁶³

One argument against the NEH was that it had grown too political. In 1994, the nation erupted in controversy over the National History Standards, a program initiated by the George H. W. Bush administration to create a standardized curriculum for American and world history in public schools. Soon after its publication, Lynne Cheney, who had just finished a term as Chair of the NEH the previous year, published an editorial piece in the *Wall Street Journal* titled "The End of History," which criticized the standards for being dismissive of "traditional history."⁶⁴ Other opponents, especially those in conservative media outlets, agreed with Cheney and argued that the standards included anti-Western and anti-American propaganda.⁶⁵ Both the Department of Education and the NEH were implicated in the controversy because they contributed funds towards the program's development, even though the agencies did not directly influence its tendentious contents. When the bill to approve the National History Standards reached the Senate

⁶² Johnson, *Political Economy of the United States*, 145.

⁶³ Koch, "The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis."

⁶⁴ Lynne Cheney, "The End of History," *Wall Street Journal*, October 20, 1994.

⁶⁵ Diane Ravitch, "The Controversy Over National History Standards," *Bulletin of the American Academy of Arts and Sciences* 51, no. 3 (1998): 17.

floor Democrats and Republicans banded together to vote 99-1 against it. Thereafter, Republicans in Congress continued to associate the controversial program with the NEH to bolster their arguments against the agency.⁶⁶ Arguments in favor of deregulating and defunding federal humanities programs indicated not only a widespread acceptance of neoliberal ideology in government, but also a growing belief within the Republican Party that liberal influence was degrading the quality of history education.

Though the dissolution of the NEH never came to fruition, in 1995 Congress voted to restructure and consolidate NEH programs. The resulting 1996 federal budget included a 36% reduction in the agency's federal appropriations, Congress' largest ever single-year budget cut to the NEH, and a 38% reduction in their staff.⁶⁷ Since FY 1996, appropriations to the NEH have been relatively stable but also considerably lower than they were in the mid-twentieth century (see figure 1). Ever since the 1980s, the debate over the government's role in the arts and humanities has become a matter of partisan politics, with conservatives favoring limited or even no spending on these programs and liberals favoring government support. Of course, spending on the NEH was contested in Congress and in the media even before Reagan, but the onset of neoliberal ideas that he encouraged began a series of calculated attacks on funding for the humanities that those within the discipline have been fighting ever since.⁶⁸ The NEH is the most significant example of this battle on the federal level. During its prime, the NEH made lasting positive impacts on funding, content, and attendance at museums and its decline has been detrimental for museums on every level. Though the NEH has never been the single largest

⁶⁶ Koch, "The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis."

⁶⁷ "NEH Appropriations History," National Endowment for the Humanities, last modified 2022, <https://www.neh.gov/neh-appropriations-history>; "NEH Timeline," National Endowment for the Humanities, last modified 2014, <https://www.neh.gov/about/history/timeline>.

⁶⁸ Koch, "The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis."

funding source for most museums, their block grant, grant matching, and competitive grant programs have always incentivized state and local governments, as well as nonprofit and private philanthropic organizations, to spend more on museums.⁶⁹ The withdrawal of support at the federal level created a negative multiplier effect, which led to a decrease in the amount of funds museums could expect to get from non-federal sources.⁷⁰

THE NEH AND HISTORY MUSEUMS IN NORTH CAROLINA

Reviewing the grants that the NEH awarded to history museums in North Carolina between 1977 and 2020 provides an example of the negative effects that neoliberal influenced economic policy has had on funding at history museums. Throughout its lifetime the NEH has provided a substantial amount of funding to history museums in North Carolina. Though only thirty-two of the 546 grants the NEH awarded for history-based projects in the state went to history museums, the combined total of those thirty-two grants equates to approximately \$10.4 million dollars in inflation-adjusted value (2022 USD).⁷¹ NEH grants typically consist of large cash awards, ranging from thousands to millions of dollars, distributed over a span of one to five years. Though the NEH awarded a roughly equal number of grants during the twentieth and twenty-first centuries, around 85% of the grant money, or approximately \$8.8 million dollars (2022 USD), was distributed during the twentieth century. The decline in grant value after the

⁶⁹ Patricia N. Hughes and William A. Luksetich, "The Relationship Among Funding Sources for Art and History Museums," *Nonprofit Management & Leadership* 10, no. 1 (1999): 21-22; Leon and Rosenzweig, *History Museums in the United States*, 27.

⁷⁰ My use of the term multiplier effect comes from this definition: "The multiplier effect is an economic term, referring to the proportional amount of increase, or decrease, in final income that results from an injection, or withdrawal, of capital," see Akhilesh Ganti, "What Is the Multiplier Effect? Formula and Example," *Investopedia*, August 30, 2022, <https://www.investopedia.com/terms/m/multipliereffect.asp>.

⁷¹ "Funded Projects Query Form, State: North Carolina, Project field: History: All," National Endowment for the Humanities, accessed November 7, 2022, <https://shorturl.at/rxCeL>; "Funded Projects Query Form, Organization type: History Museum, State: North Carolina, Date range: 1966-2023," National Endowment for the Humanities, accessed November 7, 2022, <https://shorturl.at/fhknv>; "Funded Projects Query Form, State: North Carolina, Keywords: museum (ANY of these words -- matching substrings), Date range: 1966-2023," National Endowment for the Humanities, accessed November 7, 2022, <https://shorturl.at/lGKO5>.

twentieth century is a direct result of the Reagan Administration and the 1996 federal budget.

The correlation between neoliberal influenced policies on the federal level and reduced funding at state and local museums suggests that neoliberal ideology exacerbates financial crises at history museums on every level.

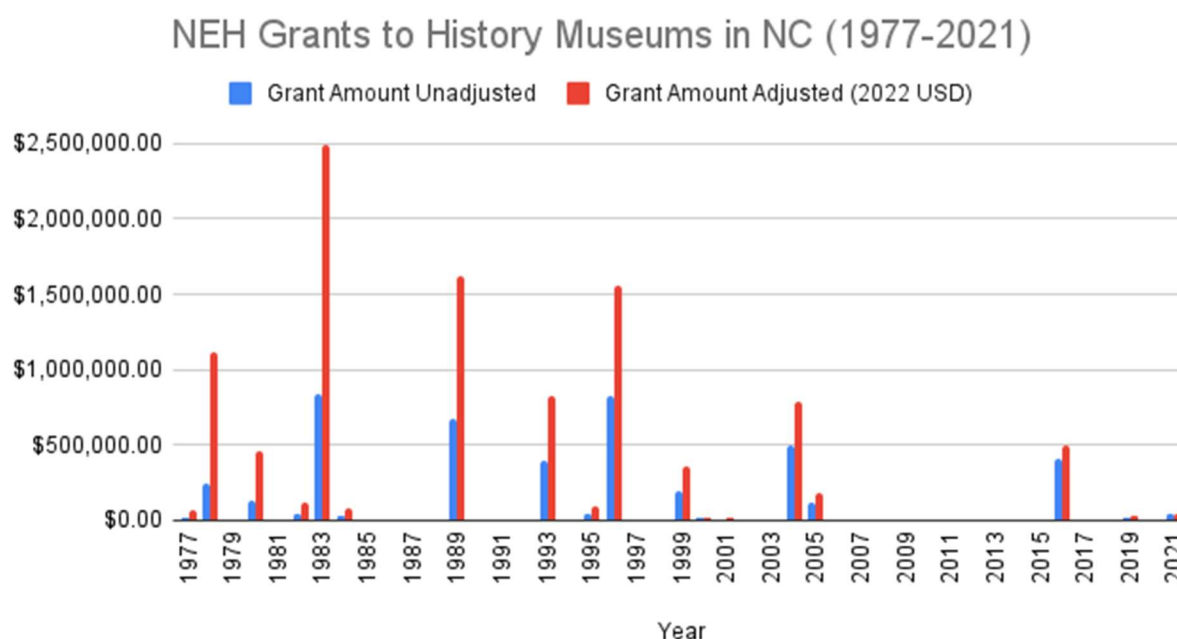


FIGURE 2: Grants to History Museums in NC (1977-2021). This figure denotes appropriations to the NEH in unadjusted value and inflation adjusted 2022 USD.⁷²

History museums in North Carolina saw spikes and then a gradual decline in the monetary value of federal grant awards as a result of decreased federal appropriations to the NEH. NEH grant awards to history museums in North Carolina peaked at just under \$2.5 million

⁷² For the data set from figure 2, see “Funded Projects Query Form, Organization type: History Museum, State: North Carolina, Date range: 1966-2023,” National Endowment for the Humanities, accessed November 7, 2022, <https://shorturl.at/fhknv>; “Funded Projects Query Form, State: North Carolina, Keywords: museum (ANY of these words -- matching substrings), Date range: 1966-2023,” National Endowment for the Humanities, accessed November 7, 2022, <https://shorturl.at/lGKO5>; Inflation calculations for figures 2-8 and 11-12 come from the U.S. Bureau of Labor Statistics “CPI Inflation Calculator” with July as the designated month for all years, see “CPI Inflation Calculator,” U.S. Bureau of Labor Statistics, last modified 2023, https://www.bls.gov/data/inflation_calculator.htm.

dollars (2022 USD) in FY 1983, after the Reagan administration had already begun cutting the agency's appropriations. However, during this time the NEH's federal appropriations still amounted to \$315.83 million dollars (2022 USD), approximately half of what the agency received on average after the 1996 budget cuts (see figure 1). FY 1983 is also one of the only years where the NEH awarded multiple grants to history museums in North Carolina. Old Salem Museum and Gardens received the two largest grants that year, valued at \$234,292.33 and \$2,224,294.29 (2022 USD). The NEH has always awarded more grant money to Old Salem compared to other museums in the state: out of the thirty-two grants that the NEH awarded to history museums in North Carolina, fourteen went to Old Salem. This is perhaps because of the museum's continued success in funding and generating attendance, which NEH grants undoubtedly helped to foster.

The second spike in FY 1989 occurred because proponents of the NEH were finally successful at pressuring the Reagan administration to propose a budget that did not include cuts to federal spending on the arts and humanities.⁷³ This decision led to increased grant money for state and local history museums, which in North Carolina amounted to \$1,615,689 (2022 USD). The third spike in FY 1996 was the result of another large grant to Old Salem, totaling \$1,135,021 (2022 USD), and one to the Museum of the Cherokee Indian, totaling \$416,817.56 (2022 USD).⁷⁴ These spike years are the result of long-standing relationships that the NEH built with museums throughout the twentieth century as well as the work of pro-humanities advocates who continually fought against neoliberal influenced economic policies. After these three peak

⁷³ Judith Michaelson, "Arts Budget: It's a No-Slash Cash Request," *Los Angeles Times*, February 19, 1988, <https://www.latimes.com/archives/la-xpm-1988-02-19-ca-29676-story.html>.

⁷⁴ "Funded Projects Query Form, Organization type: History Museum, State: North Carolina, Date range: 1966-2023," National Endowment for the Humanities, accessed November 7, 2022, <https://shorturl.at/fhknv>; "Funded Projects Query Form, State: North Carolina, Keywords: museum (ANY of these words -- matching substrings), Date range: 1966-2023," National Endowment for the Humanities, accessed November 7, 2022, <https://shorturl.at/IGKO5>.

years, the dollar value of NEH grant awards to history museums in North Carolina trended downward going into the twenty-first century.

FINANCIAL DATA ON HISTORY MUSEUMS IN NORTH CAROLINA (1980-2020)

Much like federal appropriations to the NEH and subsequent NEH grants to history museums, average income at history museums in North Carolina has also declined in recent years. Though this trend is apparent in both state-owned and nonprofit museums, the data on state-owned museums encompasses the largest time range and so it is best to begin with this type of museum. All seven state-owned history museums exist within the North Carolina Department of Cultural Resources (NCDRC), which allocates appropriations to all state-owned history museums and historic sites and supplements funding at multiple nonprofit history museums across the state. The North Carolina Office of Archives and History (OAH), formerly the North Carolina Division of Archives and History, is a state agency within the NCDRC that oversees the Division of State History Museums, as well as the State Archives and the State Historic Sites.⁷⁵ Currently, the Division of State History Museums includes the North Carolina Museum of History, the Museum of the Albemarle, the Mountain Gateway Museum, the Museum of the Cape Fear Historical Complex, the NC Maritime Museum in Beaufort, the NC Maritime Museum at Southport, and the Graveyard of the Atlantic Museum.

By 1980, the North Carolina Museum of History and its two regional museums, the Museum of the Albemarle and the Mountain Gateway Museum, were already state-owned entities and included in the NCDRC budget. In 1988, the department added a third regional

⁷⁵ The OAH was formerly the North Carolina Division of Archives and History before the 2000-2002 biennium, see North Carolina Office of Archives and History, *Forty-Ninth Biennial Report of the Office of Archives and History*, 2003, 1, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/25793>.

museum, the Museum of the Cape Fear Historical Complex.⁷⁶ In 1997, the NCDCCR established the Maritime Museum system, headed by the NC Maritime Museum in Beaufort.⁷⁷ The Maritime Museum system later added the NC Maritime Museum at Southport in 1999 and the Graveyard of the Atlantic Museum in 2007.⁷⁸ The NC Maritime Museum at Roanoke Island was also a part of the Maritime Museum system from 1998 to 2008 but was later transferred over to the Roanoke Island Historical Commission.⁷⁹ All of the state-owned history museums in North Carolina receive yearly recurring appropriations from the state budget. In addition, these museums also have associated nonprofit organizations, typically referred to as “friends” organizations, for fundraising purposes. For these reasons, the financial data from state-owned museums includes both state appropriations and nonprofit revenue. These museums also receive grants and generate earned income, which may not be reflected in figure 3.

⁷⁶ “About Us,” Museum of the Cape Fear Historical Complex, accessed April 18, 2023, <https://museumofthecapefear.ncdcr.gov/about-us>.

⁷⁷ North Carolina Division of Archives and History, *Forty-Seventh Biennial Report of the Office of Archives and History*, 1999, 1, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/734036>.

⁷⁸ “About,” NC Maritime Museum at Southport, accessed April 18, 2023, <https://ncmaritimemuseumsouthport.com/about/>; North Carolina Office of Archives and History, *Fifty-Second Biennial Report of the Office of Archives and History*, 2009, 2, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/92152>.

⁷⁹ North Carolina Office of Archives and History, *Fifty-Second Biennial Report of the Office of Archives and History*, 64.

Total Revenue of State-Owned History Museums in NC (1980-2020)

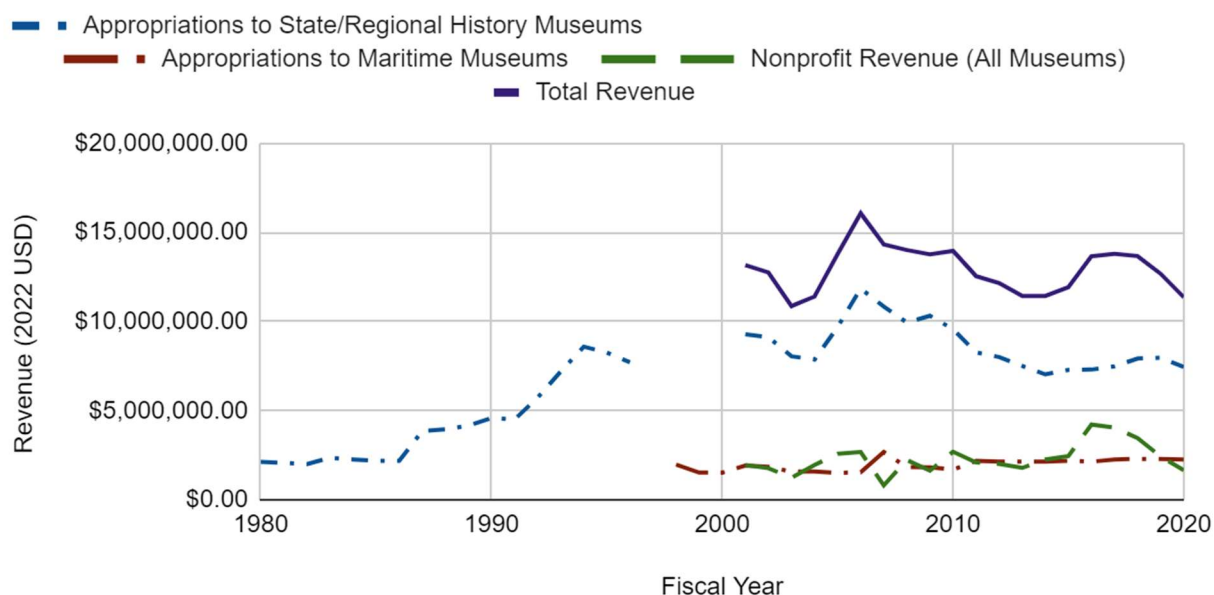


FIGURE 3: Total Revenue of State-Owned History Museums in NC (1980-2020). This figure denotes total revenue in inflation adjusted 2022 USD. The museums included in this data set are the North Carolina Museum of History, the Museum of the Albemarle, the Mountain Gateway Museum, the Museum of the Cape Fear Historical Complex, the NC Maritime Museum in Beaufort, NC Maritime Museum at Southport, and Graveyard of the Atlantic Museum.⁸⁰

The data from figure 3 comes from the North Carolina Office of Archives and History's *Biennial Reports* from 1980 to 2018, which records state appropriations to the Division of State History Museums, and 990 tax forms from ProPublica nonprofit database. The purpose of this figure is to display fluctuations in average total revenue at state-owned history museums from

⁸⁰ See the bibliography for the full citations of the OAH's *Biennial Reports* (1980-2018) and nonprofit data from ProPublica (2001-2020) as well as Appendix B and C. Currently, the OAH has not released their *Biennial Reports* for 2018-2020 and 2020-2020 because of the COVID-19 pandemic. Instead, data on state appropriations from those years was provided by Stephan K. Demeritte (Chief Financial Officer of the North Carolina Museum of History), "Museum of History Budget SFY 17-18, 18-19, and 19-20," email to author, April 6, 2023. In addition, revenue from the Friends of the Museum North Carolina Maritime Museum INC. in 2006 has been removed because it is a negative outlier at -\$5,605,085.47 (2022 USD) and unrepresentative of the typical revenue at most nonprofits associated with state-owned history museums. Furthermore, this figure *does not* include any revenue from earned income because there is no consistent data on that source of funding.

1980 to 2020. The nonprofit data, however, is limited to FYs 2001-2020.⁸¹ The seven state-owned history museums are separated into two categories based on the ‘system’ they represent within the Division of State History Museums; the four State/Regional History Museums and the three Maritime Museums.⁸²

During the 1970s, the OAH saw “several successive bienniums of considerable budgetary expansion.”⁸³ However, during the early 1980s, neoliberal influence from the Reagan Administration and Congress began to trickle down to the North Carolina legislature. From FYs 1980 to 1983, the North Carolina General Assembly implemented new economic policies to reduce expenditures, which resulted in decreased appropriations for cultural institutions. To begin, the state cut nearly half a million dollars (approximately \$1.5 million in 2022 USD) from the OAH’s operating budget and eliminated 5% of their staff.⁸⁴ Though these cuts prevented most staff travel, limited equipment and supply purchases, and curtailed printing, the agency and the state’s history museums still saw great successes.⁸⁵ During this time instruction in state history became mandatory curriculum for all eighth graders, historic sites garnered near record attendance rates, and the North Carolina Museum of History’s nonprofit grew to include 5000

⁸¹ See “History for Sale,” 47-48, for an explanation of the limitations of digital nonprofit databases.

⁸² This data excludes nonprofit revenue from the Mountain Gateway Museum. Though the museum does have an associated nonprofit, that organization does not publish their 990 forms on ProPublica or any other free public database. In addition, there have only ever been three or less museums in the Maritime Museum branch at a time. From 1997 to 2008 the third museum was the NC Maritime Museum at Roanoke Island. After this museum became part of the Roanoke Island Historical Commission in 2008, the Graveyard of the Atlantic Museum took its place as the third maritime museum, see North Carolina Division of Archives and History, *Forty-Eighth Biennial Report of the North Carolina Division of Archives and History*, 2001, 2, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/734565>.

⁸³ North Carolina Division of Archives and History, *Fortieth Biennial Report of the North Carolina Division of Archives and History*, 1985, 1, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/732464>.

⁸⁴ North Carolina Division of Archives and History, *Thirty-Ninth Biennial Report of the North Carolina Division of Archives and History*, 1983, 1-2, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/732464>.
<https://digital.ncdcr.gov/digital/collection/p249901coll22/id/732227/rec/91>.

⁸⁵ North Carolina Division of Archives and History, *Fortieth Biennial Report of the North Carolina Division of Archives and History*, 1.

members.⁸⁶ Budget retrenchment continued until FY 1983, when the state restored (but did not expand) the agency's appropriations. William S. Price, then director of the OAH, credits the agency's funding successes to the public's "general high regard for the program," which helped to bolster support during the 1984 General Assembly session.⁸⁷

Despite funding cuts on the national level, the latter half of the 1980s spelled good fortune for North Carolina's history museums: between FYs 1984 and 1990, the budget for state-owned history museums more than doubled (see figure 3). The decision to restore and then improve the OAH's funding had a significant positive impact on the state's museums and historic sites. In 1984, the State Historic Site in Manteo opened the *Elizabeth II*, a replica sixteenth century ship used in the Roanoke Voyages, which attracted two million people including British Royal Princess Anne. In 1985, the North Carolina Museum of History launched their first international exhibit with the British Library, entitled "Raleigh and Roanoke," which attracted upwards of 100,000 visitors. The museum's success persuaded the General Assembly to allocate funding for a new building, which enabled them to abandon plans to inherit the old art museum.⁸⁸ Even nonprofit museums benefited from the state's renewed commitment to history; in 1989 the General Assembly approved \$100,000 (or \$238,163.99 in 2022 USD) for grant matching programs to nonprofit historical attractions. By the end of the decade the OAH boasted 400 employees, the largest staff size of any state historical agency in the United States.⁸⁹

⁸⁶ North Carolina Division of Archives and History, *Thirty-Ninth Biennial Report of the North Carolina Division of Archives and History*, 2.

⁸⁷ North Carolina Division of Archives and History, *Fortieth Biennial Report of the North Carolina Division of Archives and History*, 1.

⁸⁸ North Carolina Division of Archives and History, *Forty-First Biennial Report of the North Carolina Division of Archives and History*, 1987, 1, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/732717>.

⁸⁹ North Carolina Division of Archives and History, *Forty-Third Biennial Report of the North Carolina Division of Archives and History*, 1991, 1, <https://archive.org/details/biennialreportof1988nort/page/n9/mode/2up?view=theater>.

State Appropriations to the Office of Archives and History (1969-2017)

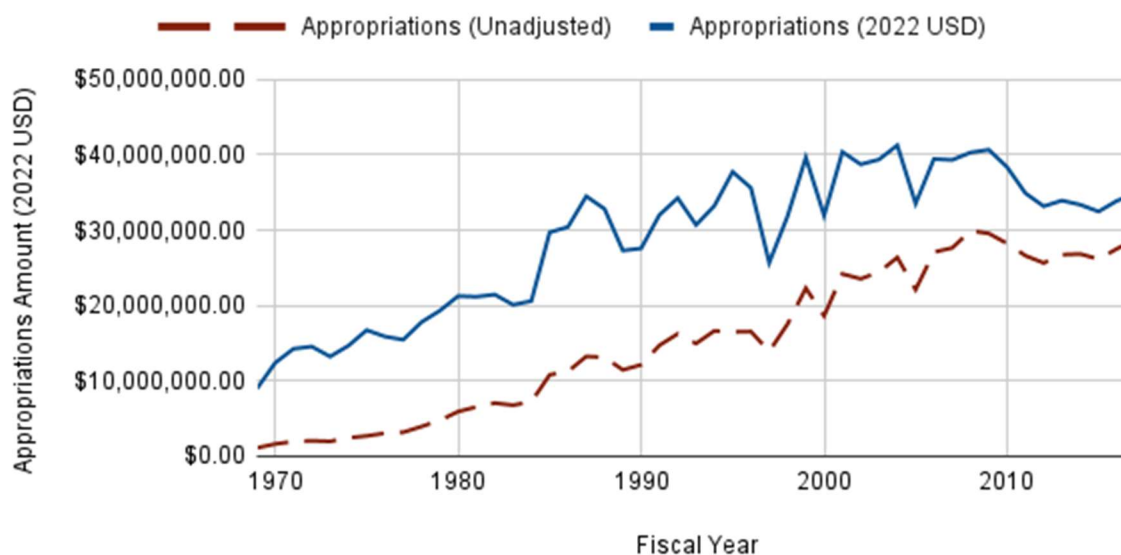


FIGURE 4: State Appropriations to the Office of Archives and History (1969-2017). This figure denotes total revenue in inflation adjusted 2022 USD.⁹⁰

However, this era of government involvement and heightened appropriations did not continue into the 1990s. Throughout the final decade of the twenty-first century, the OAH experienced a series of alternating budget cuts and expansions. This trend eventually culminated in a concerted effort by certain politically conservative members of the General Assembly to defund the OAH and state-owned history museums. In the *Forty-Eighth Biennial Report* (1998-2000), OAH Deputy Secretary Jeffrey J. Crow stated that, “the decade of the 1990s was tough. Budget cuts trimmed operating budgets every year since 1991 and eliminated more than forty positions.”⁹¹ Much like the NEH budget cuts after 1996, FYs 1996 to 1997 signaled the OAH’s

⁹⁰ For the data set from figure 4, see North Carolina Office of Archives and History, “Appendix 3: Annual Appropriations and Expenditures, 1966–2016,” in the *Fifty-Seventh Biennial Report of the North Carolina Office of Archives and History*, 2019, 172, <https://digital.ncdcr.gov/digital/collection/p16062coll9/id/541699>. See also Appendix D.

⁹¹ North Carolina Division of Archives and History, *Forty-Eighth Biennial Report of the North Carolina Division of Archives and History*, 3.

largest ever single-year budget cut, which amounted to a 28% reduction in appropriations from \$35,611,776.61 to \$25,690,367.00 (2022 USD).⁹² Furthermore, reductions in government spending during the 1990s catalyzed shifts in funding models at history museums. Crow noted as much in the forty-eighth “Director’s Report,” where he claimed that, “it will take the concerted efforts of the citizens of North Carolina, of a new administration, of private, nonprofit, and philanthropic organizations, as well as the tireless commitment of the division’s staff and management to provide the kinds of services and programs that North Carolinians have come to expect.”⁹³ Crow’s statement indicates two important facts: first, that the general public recognized the social and cultural importance of history museums; and second, that as state and federal funds receded near the end of the twenty-first century, the private sector became a more prominent source of funding for museums and historic sites.

Though Crow’s report explicitly identified a decrease in funding, there is a distinct lack of data on appropriations to State/Regional History Museums from FYs 1997 to 2000. This is because in 1997 the legislature approved Senate Bill 327, which declared that the North Carolina Museum of History and its three regional museums had expanded enough to justify their removal from the OAH. Thereafter, the four State/Regional History Museums became their own division within the NCDRC, entitled the “North Carolina Museum of History Division.”⁹⁴ Since the OAH no longer managed the State/Regional History Museums, *Biennial Reports* from 1996-1998 and 1998-2000 did not include any appropriations data on the museums. The Museum of History

⁹² Office of Archives and History, “Appendix 3: Annual Appropriations and Expenditures, 1966–2016,” 172. See also Appendix D.

⁹³ North Carolina Division of Archives and History, *Forty-Eighth Biennial Report of the North Carolina Division of Archives and History*, 3.

⁹⁴ The General Assembly of North Carolina, Senate, *An act to make technical changes to the General Statutes governing The Department of Cultural Resources and the North Carolina Historical Commission (S.L. 1997-411 Senate Bill 327)*, August 20, 1997, <https://www.ncleg.gov/Sessions/1997/Bills/Senate/PDF/S327v2.pdf>.

Division published three of their own *Biennial Reports* from 1994-2000, but they did not include their appropriations history.⁹⁵ In addition, because the archived budget documents from the General Assembly's Division of Fiscal Research do not include line items for each department of the State Government, it is unclear how much money the state appropriated to the North Carolina Museum of History Division during FYs 1997-2000.

However, it is apparent that the General Assembly made overarching changes to state-owned history museums during this time. For example, during sessions in 1995 and 1996 the General Assembly mandated that the North Carolina Museum of History should “eliminate [the] salaries and related benefits of nine and one-half (9.5) positions,” and reduce funds for supplies and materials, maintenance and repairs, telecommunications bills, equipment, exhibits, and artifacts purchases.⁹⁶ These sessions also required the North Carolina Maritime Museum in Beaufort to participate in a feasibility study to see if the museum should implement admission fees.⁹⁷ Similarly, in 1997 the legislature appropriated \$608,945 to build a new restaurant in the North Carolina Museum of History, the revenue from which would support their “programs and projects.”⁹⁸ The North Carolina Museum of History Division's *Biennial Report* from 1996-1998 stated that “the museums enjoy great support from the North Carolina General Assembly, the North Carolina Department of Cultural Resources, and their array of nonprofit support.”⁹⁹

⁹⁵ North Carolina Museum of History Division, *Biennial Report of the North Carolina Museum of History Division 1994-1996* (Raleigh: NCDRC, 1997); North Carolina Museum of History Division, *Biennial Report of the North Carolina Museum of History Division 1996-1998* (Raleigh: NCDRC, 1999); North Carolina Museum of History Division, *Biennial Report of the North Carolina Museum of History Division 1998-2000* (Raleigh: NCDRC, 2001).

⁹⁶ Fiscal Research Division of the North Carolina General Assembly, *Overview: Fiscal and Budgetary Actions, North Carolina General Assembly, 1995 Session and 1996 Session*, 1997, G-16 (118), https://sites.ncleg.gov/frd/wp-content/uploads/sites/7/2020/09/Overview_1995_and_1996.pdf.

⁹⁷ Fiscal Research Division of the North Carolina General Assembly, *Overview: Fiscal and Budgetary Actions, North Carolina General Assembly, 1995 Session and 1996 Session*, J-7 (289).

⁹⁸ Fiscal Research Division of the North Carolina General Assembly, *Overview: Fiscal and Budgetary Actions, North Carolina General Assembly, 1997 Session*, 1998, G-12 (96) and M-4 (268), https://sites.ncleg.gov/frd/wp-content/uploads/sites/7/2020/09/Overview_1997.pdf.

⁹⁹ North Carolina Museum of History Division, *Biennial Report of the North Carolina Museum of History Division 1996-1998*, 1.

However, during the 1998-2000 biennium the legislature cut the Museum of History Division's operating budget by \$165,623 (or \$283,970.60 in 2022 USD).¹⁰⁰ These cuts also resulted in \$5,258,695 (or \$9,016,349.07 in 2022 USD) being taken from previously funded capital projects.¹⁰¹ Despite the lack of appropriations data, it is clear that the General Assembly enacted neoliberal influenced policies to decrease their financial responsibility to history museums and instead encouraged them to pursue alternative forms of funding, especially from earned income.

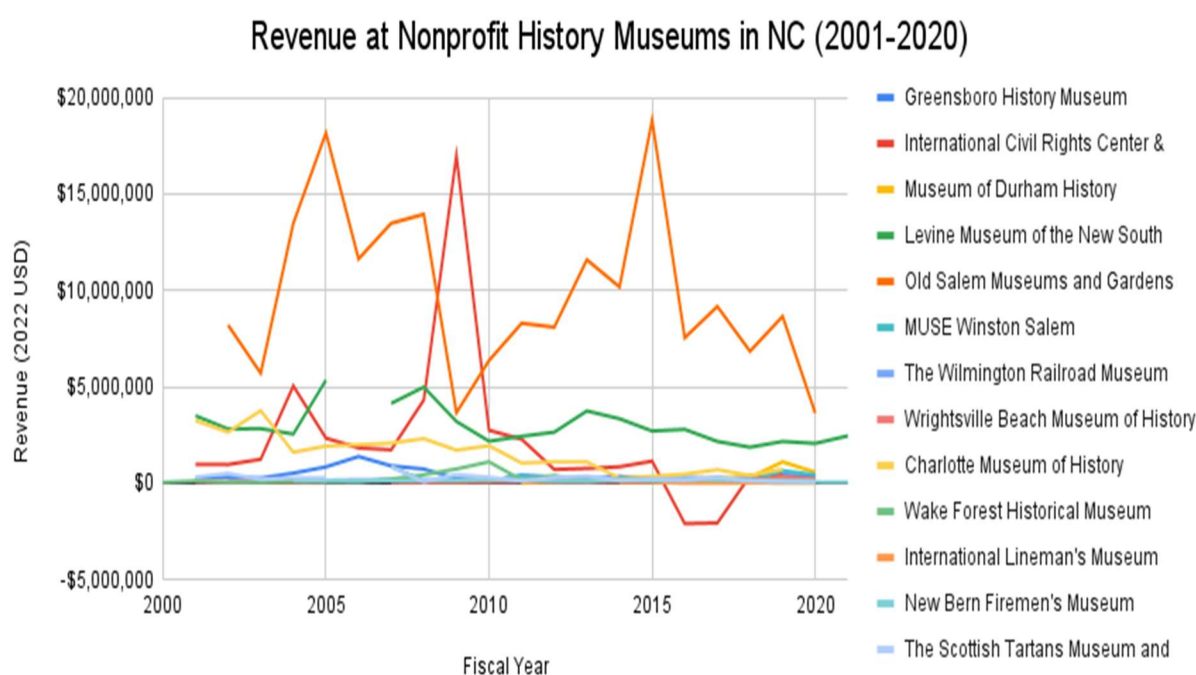


FIGURE 5a: Revenue at Nonprofit History Museums in NC (2001-2020). This figure denotes individual total revenue in inflation adjusted 2022 USD.¹⁰²

¹⁰⁰ North Carolina Museum of History Division, *Biennial Report of the North Carolina Museum of History Division 1998-2000*, 1.

¹⁰¹ North Carolina Museum of History Division, *Biennial Report of the North Carolina Museum of History Division 1998-2000*, 1.

¹⁰² For the data set from figure 5a, see ProPublica Nonprofit Explorer Database (see bibliography for full citations) as well as Appendix E.

Average Total Revenue at Nonprofit History Museums in NC (2001-2020)



FIGURE 5b: Average Total Revenue at Nonprofit History Museums in NC (2001-2020). This figure denotes average total revenue in inflation adjusted 2022 USD.¹⁰³

In 2000, the legislature dissolved the Museum of History Division and created the Division of State History Museums. This decision reinstated the OAH as the managerial head of all the state-owned history museums and mandated that the new division absorb the Maritime Museum system.¹⁰⁴ Thereafter, appropriations history for all seven state-owned history museums began to appear in the OAH's *Biennial Reports* once more. In addition, the turn of the twenty-first century also marked a time when financial data on nonprofit museums became publicly available. There is a wealth of data on nonprofit museums because section 501(c)(3) of the Internal Revenue Code requires tax exempt organizations to disclose their annual reports for the

¹⁰³ For the data set from figure 5b, see ProPublica Nonprofit Explorer Database (see bibliography for full citations) as well as Appendix F. The outliers in the data set are Old Salem for all years and the ICRCM in 2009. The average total revenue and the average total revenue without high outliers are depicted with separate trend lines because the outlier years at Old Salem and the ICRCM museums are unrepresentative of the typical revenue at most nonprofit history museums in North Carolina.

¹⁰⁴ North Carolina Office of Archives and History, *Forty-Ninth Biennial Report of the Office of Archives and History*, 2003, 1, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/25793>.

sake of public transparency. Online archives, such as ProPublica, publish this information for free on the internet going back as far as 2001. Though nonprofit museums do not receive yearly appropriations from the state, the General Assembly often earmarks non-recurring funds and grant matching programs for nonprofit history museums in the state budget. Therefore, it is important to include nonprofit history museums in policy analysis. The data from figures 5a and 5b are sourced from the income that nonprofit museums reported on their 990 tax forms, which is the Internal Revenue Service's main method of collecting information on tax-exempt organizations. These figures display fluctuations in individual total revenue, average total revenue, and average total revenue without high outliers at thirteen nonprofit history museums in North Carolina between 2001 and 2020. The museums included in this data set are diverse in content, size, and location and represent the variety of history museums that North Carolina has to offer.

One of the most obvious trends that the data reveals is that revenue at both state-owned and nonprofit museums reached a peak in FYs 2006 and 2008, respectively, and then sloped into a gradual decline (see figure 3 and figure 5b). This decline is related to a series of budget cuts the North Carolina General approved to NCDCCR and the OAH during the twenty-first century.¹⁰⁵ The cuts began to affect state-owned history museums after FY 2006, when the General Assembly decreased appropriations to the State/Regional History Museums by approximately \$1 million dollars (2022 USD). At the time that these funding cuts occurred, many Republicans in

¹⁰⁵ For more on budget cuts to the NCDCCR, see the following: During FY 2006, appropriations from the General Fund to the NCDCCR amounted to \$73,458,514, but decreased to \$68,338,163 during FY 2007, see Fiscal Research Division of the North Carolina General Assembly, *Overview: Fiscal and Budgetary Actions, North Carolina General Assembly, 2005 Session*, 2006, B-4 (20), https://sites.ncleg.gov/frd/wp-content/uploads/sites/7/2020/09/Overview_2005.pdf; Fiscal Research Division of the North Carolina General Assembly, *Overview: Fiscal and Budgetary Actions, North Carolina General Assembly, 2006 Session*, 2007, B-4 (14), https://sites.ncleg.gov/frd/wp-content/uploads/sites/7/2020/09/Overview_2006.pdf; For data on budget cuts to the OAH, see Appendix D.

Congress and in the North Carolina General Assembly were concerned that some museums were receiving irresponsible amounts of public dollars. One particularly controversial example of this is the Teapot Museum in Sparta, North Carolina. In 2005, the General Assembly awarded \$400,000 to the museum in hopes that its opening would increase tourism in the small mountain town. Republicans who opposed the decision adopted the museum as “their poster child for pork barrel and wasteful spending by Democrats.”¹⁰⁶ The Teapot Museum became a famous example of pork barrel spending, which undoubtedly contributed to the budget cuts after FY 2006.

Between FYs 2007 and 2010, appropriations to the Division of State History Museums decreased from \$9.5 to \$8.3 million dollars, which, when adjusted for inflation, represents a loss of 16.7% (see figure 3).¹⁰⁷ These cuts caused high staff turnover rates due to “the inability to compete with salaries in the private sector or in other states” and mandatory layoffs, which made it particularly difficult for museums, and the NCDHR in general, to maintain operations.¹⁰⁸

When the Great Recession of 2008 began, museums and other cultural institutions across the nation were among the first organizations to see their funding slashed by draconian budget cuts.¹⁰⁹ This was also true for museums in North Carolina. In 2012, OAH Deputy Secretary Crow summarized the hardships that cultural organizations in North Carolina confronted during and after the recession in his final *Biennial Report*.

I depart as the agency, state, and nation continue to confront the worst financial crisis since the Great Depression. The North Carolina General Assembly this past year passed a budget over the

¹⁰⁶ Chris Fitzsimon, “Museums and Pork Barrel,” *North Carolina Policy Watch*, April 12, 2006, <https://ncpolicywatch.com/2006/04/12/wednesday-commentary-26/>.

¹⁰⁷ In FY 2007, appropriations to the Division of State History Museums amounted to \$9,504,034.00 (\$13,518,150.24 in 2022 USD), but by FY 2010 appropriations had decreased to \$8,287,911.00 (\$11,263,234.97 in 2022 USD) (see Appendix B).

¹⁰⁸ Jeffrey J. Crow, “Deputy Secretary’s Report,” in North Carolina Office of Archives and History, *Fifty-Second Biennial Report of the North Carolina Office of Archives and History*, 2009, 4, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/92152/rec/2>.

¹⁰⁹ Ford W. Bell, “How Are Museums Supported Financially in the U.S.?” *Embassy of the United States of America*, March 2012, https://static.america.gov/uploads/sites/8/2016/03/You-Asked-Series_How-Are-Museums-Supported-Financially-in-the-US_English_Lo-Res_508.pdf.

governor's veto that reduced appropriations to the Department of Cultural Resources by 11.9 percent. Because the department's operational funds had eroded by 61 percent with budget cuts during the previous two years, both vacant and filled positions as well as pass-through grants were used to meet those reductions. Overall, the department has lost 26 percent of its budget in the last four years.¹¹⁰

Although the Great Recession had a noticeable impact on museum funding, a shift in the General Assembly's dominant political ideology also helped to bolster defunding initiatives. In 2010, at the same time that Republicans in the House of Representatives secured the biggest shift in seats since 1948, the Republican Party in North Carolina also gained the majority in the General Assembly for the first time in more than a century.¹¹¹ The party's victory came with a slew of neoliberal influenced policy initiatives that have continued to have a major influence on state-wide politics ever since. In general, the Republican Party ran on calls to reduce North Carolina's state budget, which can be seen in the large cuts they approved to programs for education, health care, public safety, and many cultural institutions.¹¹² Another example of neoliberal influenced policy from this era is the Tax Simplification and Reduction Act of 2013, which reduced corporate and individual tax rates 58.3% and 9.48%, respectively, between FYs

¹¹⁰ Jeffrey J. Crow, "Deputy Secretary's Report," in North Carolina Office of Archives and History, *Fifty-Fourth Biennial Report of the North Carolina Office of Archives and History*, 2013, 1, <https://digital.ncdcr.gov/digital/collection/p16062coll9/id/541809>.

¹¹¹ "Republican Party Takes Control Over NC General Assembly," *WECT News 6*, last modified November 6, 2010, <https://www.wect.com/story/13434773/republican-party-takes-control-over-nc-general-assembly/>.

¹¹² Claudio Sanchez, "Education Cuts Squeeze N.C. Teachers," *National Public Radio*, July 31, 2011, <https://www.npr.org/2011/07/31/138862695/north-carolina-cuts-squeeze-education-programs>; Rose Hoban, "Governor's Budget has Rough Cuts for Health & Human Services," *North Carolina Health News*, May 17, 2012, <https://www.northcarolinahealthnews.org/2012/05/17/governors-budget-has-rough-cuts-for-health-human-services/>; Suzy Khachaturyan and Alexandra Forter Sirota, "A Budget that Leaves North Carolina Worse Off," *North Carolina Budget and Tax Center*, April 12, 2022, <https://ncbudget.org/a-budget-that-leaves-north-carolina-worse-off/>; Tazra Mitchell, "Update: Why the 2015 State Budget Undermines North Carolina's Competitiveness," *North Carolina Policy Watch*, December 13, 2012, <https://ncpolicywatch.com/2014/12/03/update-why-the-2015-state-budget-undermines-north-carolinas-competitiveness/>; Benjamin Filene, "Hurting Ourselves with Cultural Cuts," *North Carolina Policy Watch*, August 28, 2012, <https://ncpolicywatch.com/2012/08/28/hurting-ourselves-with-cultural-cuts/>.

2014 and 2020.¹¹³ The grave effects of neoliberal influenced policies are evidenced in the fact that state funding for museums declined steeply after 2010, which effectively downsized the State Government's role in and financial responsibility to its history museums and historic sites.¹¹⁴

Miraculously, all of North Carolina's state-owned museums managed to survive both the recession and the legislature's renewed defunding initiatives, though the effects were considerable. Some of the most compromised museums include the North Carolina Transportation Museum, which lost 50% of its appropriations and 55% of its staff, the Museum of the Cape Fear, which also lost over 50% of its appropriations, and Tryon Palace, which lost a total of \$1.92 million dollars in annual appropriations.¹¹⁵ As a result, many museums in the state were forced to abandon "major programs..., reduce operating hours, and increase admission fees" to make ends meet.¹¹⁶ For a time some museums, such as the Museum of the Albemarle, the Mountain Gateway Museum, and the History Center at Tryon Palace, even faced closure.¹¹⁷ Nonprofit museums most of all witnessed the detrimental effects of this decade; even after the economy recovered from the Great Recession during the mid-2010s, average revenue at these

¹¹³ Fiscal Research Division of the North Carolina General Assembly, "North Carolina History of Major Tax Rates," last modified May 2022, 2, https://sites.ncleg.gov/frd/wp-content/uploads/sites/7/2022/06/History-of-State-Tax-Rates_Updated.pdf.

¹¹⁴ Kevin Reopelle, "Historic Sites Could Face Closure Due to Budget Cuts," *Spectrum News 1*, May 26, 2011, https://spectrumlocalnews.com/nc/coastal/archives/2011/05/26/historic-sites-could-face-closure-due-to-budget-cuts.NC_641565.

¹¹⁵ Jeffrey J. Crow, *Fifty-Fourth Biennial Report of the North Carolina Office of Archives and History*, 2.

¹¹⁶ Victoria Torres, "With State Funding Drying Up, Museums and Archives Turn to the Private Sector," *History News Network*, February 27, 2014, <https://historynewsnetwork.org/article/154860>.

¹¹⁷ Benjamin Filene, "Hurting Ourselves with Cultural Cuts:" Mike Conley, "State Budget Threatens Mountain Gateway Museum," *Hickory Daily Record*, March 21, 2013, https://hickoryrecord.com/state-budget-threatens-mountain-gateway-museum/article_e8b42cb2-926c-11e2-8c3b-0019bb30f31a.html.

museums continued to decrease. In fact, between FYs 2008 and 2020, nonprofit revenue fell by approximately 70% (see figure 5b).¹¹⁸

While revenue at nonprofit museums reached record lows, nonprofits associated with state-owned history museums began to mitigate the state's withdrawal of funds. From FYs 2010 to 2020, appropriations to the Division of State History Museums declined 13.8% or \$1.55 million dollars (2022 USD) (see figure 3).¹¹⁹ Following the 2008 recession, nonprofit revenue from "friends" organizations mirrored this downward trajectory. However, from FYs 2013 to 2016, revenue from "friends" organizations increased at an average rate of 35.6% per year. Remarkably, nonprofit revenue counteracted stagnation in state funding during the 2010s and helped to increase total revenue at state-owned museums by 20.7%.¹²⁰ While this evidence demonstrates the resilience and innovation of state-owned history museums and their nonprofit partners, it also signifies that funding models shifted away from traditional sources. Furthermore, these brief bursts of success were not sufficient to replace state appropriations in the long term. After FY 2017, nonprofit revenue fell steeply while appropriations stayed relatively stable, which resulted in yet another regression in total revenue. This trend signifies both the precariousness of nonprofit funds and their inability to satisfy the financial needs of history museums on their own, which is discussed at length in the following chapter, "From Public, to Private, to Gone."

In general, funding at history museums in North Carolina can be understood as largely resistant to the national trend toward neoliberalism until 2010. Historically, when the General

¹¹⁸ Between FYs 2008 and 2020, average revenue without high outliers at nonprofit history museums decreased from \$1,340,489.35 to \$418,172.03 (see Appendix F).

¹¹⁹ Appropriations to the Division of State History Museums (includes all seven state-owned history museums) amounted to \$11,263,234.97 (2022 USD) in FY 2010 but fell to \$9,708,000.84 (2022 USD) by FY 2020 (see Appendix B).

¹²⁰ See Figure 3 and/or Appendix B.

Assembly approved budget cuts to history museums, revenue would decrease for a short period of time but then return to or exceed previous amounts. All of these periods of decreased funding, including after 2010, can be linked to times when the Republican Party gained partial or complete majorities in the General Assembly. Likewise, restoration or increases in funding can be linked to times when the Democratic Party gained back seats in the North Carolina legislature.¹²¹ However, since 2010, Republicans have controlled both the North Carolina House of Representatives and the Senate, and as a result appropriations to state-owned museums have been largely stagnant. Similarly, funding at nonprofit museums declined for almost a decade before increasing marginally in recent years. The current state of funding is even more concerning considering that during the twenty-first century North Carolina's population increased by nearly 30% and the size of the state's economy increased by nearly 40%.¹²² Though the state should hypothetically have sufficient tax dollars with which to subsidize its cultural institutions and a large population base to attend them, funding has not increased in proportion to these developments. This evidence suggests that neoliberal influenced policies, which have strong support among the Republican Party, are more persistent and influential now than they have been at any other time in North Carolina's history.

RESPONSES FROM MUSEUM DIRECTORS AND STAFF

To assess the wellbeing of history museums during the twenty-first century, an anonymous questionnaire was sent to several museum employees in North Carolina. This questionnaire asked staff to respond to ten short answer questions about the current and past

¹²¹ "General Assembly of North Carolina," Ballotpedia, The Encyclopedia of American Politics, last modified 2023, https://ballotpedia.org/General_Assembly_of_North_Carolina.

¹²² "North Carolina Population 1900-2021," Macrotrends, accessed December 8, 2022, <https://www.macrotrends.net/states/north-carolina/population>; "Real Gross Domestic Product (GDP) of the Federal State of North Carolina from 2000 to 2021," Statista, accessed December 8, 2022, <https://www.statista.com/statistics/188097/gdp-of-the-us-federal-state-of-north-carolina-since-1997/>.

effects of underfunding and defunding (see appendix A). While twenty-three museums were solicited for comments, only eight persons representing seven museums (two nonprofits, three state-owned, and two municipal museums) participated in the questionnaire. Seven of the eight respondents identified themselves as directors, but all of the participants stated that they were knowledgeable about their museum's funding. The respondents from nonprofit and state-owned museums reported that they struggle with moderate to severe underfunding, while both municipal museums reported having very little to no issues with funding. Their responses corroborate findings from the previous section on financial data, but more importantly they reveal the manifold ways that underfunding and defunding wreak havoc on history museums.

One of the most significant findings is that the legislature's reluctance to adequately fund cultural institutions is one of the biggest struggles that history museums face. In fact, three of the four of the respondents from state-owned museums indicated that they spend time every year convincing the General Assembly that their museums are worth the public dollars that they receive. One staff member stated that "the vagaries of the legislative mood" have a "huge impact" on the financial well-being of state-owned museums.¹²³ In order to appeal to politicians, museums are tasked with "[educating] them about what we do" and convincing the General Assembly that "what we bring to North Carolina is bearing fruit."¹²⁴ Decreases in annually recurring appropriations have created museum professionals that are especially adept at securing non-recurring funds in the state budget. For example, in 2020, the North Carolina Museum of History garnered around \$135,000 from the state to borrow an exhibit on women in country

¹²³ Anonymous Interviewee #1, Questionnaire Response to Author, October 28, 2022.

¹²⁴ Anonymous Interviewee #2, Questionnaire Response to Author, October 17, 2022.

music on loan from the Grammy Museum.¹²⁵ While it is not uncommon for the state to award additional funds to several museums each budget cycle, these instances do not compensate for the overall defunding that North Carolina's history museums have experienced at the hands of the General Assembly.

In the wake of the Great Recession and reduced government support, museums have increasingly turned to the private sector to make up for their losses. Using corporate donations to supplement federal, state, and local funds has become a standard practice in the museum industry. In fact, in recent years the NCDCCR began to encourage all of its museums and historic sites to facilitate relationships with local corporations to mitigate the lack of funds from traditional sources.¹²⁶ In order to adapt to changing models of funding, both state-owned and nonprofit museums have had to learn how to market themselves to the corporate community. One director at a nonprofit museum stated that their museum is struggling to change funding methods that are outdated in the current climate. In the past this museum sustained itself on generous donations from wealthy patrons, which often measured in the hundreds of thousands. However, in recent years the museum's donor base has been "dying off," leaving the organization without adequate sources of funding.¹²⁷ The museum looks to "rebrand/separate ourselves from the poor decisions from the past and to build relationships with [the local] corporate community."¹²⁸ Out of the eight questionnaires received from museum professionals across the state, six of the respondents explicitly indicated that their museum pursues and/or maintains funding relationships with corporate sponsors.

¹²⁵ "The Power of Women in Country Music," North Carolina Museum of History, accessed December 9, 2022, <https://www.ncmuseumofhistory.org/exhibits/power-women-country-music>.

¹²⁶ Victoria Torres, "With State Funding Drying Up, Museums and Archives Turn to the Private Sector," *History News Network*, February 27, 2014, <https://historynewsnetwork.org/article/154860>.

¹²⁷ Anonymous Interviewee #3, Questionnaire Response to Author, September 26th, 2022.

¹²⁸ Anonymous Interviewee #3, Questionnaire Response to Author, September 26th, 2022.

This pro-corporation mindset has not always been as prominent in the museum industry as it is today. This is not to say that it was ever common for museums to turn down corporate donations when they were offered, especially before government support became the norm during the mid-1960s.¹²⁹ However, it is common for museums to emphasize their relationships with individual philanthropic donors and governments over those with corporate funders. This is related to the traditional societal conception of museums as cultural institutions, which understands them as trusted repositories of knowledge without a commercial focus. Historically, museums that publicly advertised their partnerships with corporations risked looking unauthentic to their audience base.¹³⁰ Even today museums must be careful to align themselves with corporations that do not detract from their public image. The British Museum made this mistake in 2022, when they partnered with BP, a multinational oil and gas company, for their “World of Stonehenge” exhibition. Many of the museum’s critics argued that it was unethical to accept funds from a company that profited from harming the environment while also claiming to care about the preservation and protection of ancient structures.¹³¹ However, the belief that museums and corporations can and should have mutually beneficial relationships is becoming more standard.

Though individual scholars have questioned the ethics of mixing cultural institutions with corporate interests, many prominent museum organizations and consulting firms support these

¹²⁹ Koch, “The Contest for American Culture: A Leadership Case Study on The NEA and NEH Funding Crisis.”

¹³⁰ Sarah Alhouti, Catherine M. Johnson, and Betsy Bugg Holloway, “Corporate Social Responsibility Authenticity: Investigating its Antecedents and Outcomes,” *Journal of Business Research* 69, no. 3 (2016): 1242–1249.

¹³¹ Elaine Velie, “Dripping in ‘Oil,’ Activists Protest BP Sponsorship of Stonehenge Exhibition,” *Hyperallergic*, April 13, 2022, <https://hyperallergic.com/724322/activists-protest-bp-sponsorship-of-stonehenge-exhibition/>; Veronica Ferrari, “Paving the Way for Ethical Sponsorship of Cultural Institutions,” *Museum Identity*, March 21, 2022, <https://museum-id.com/paving-the-way-for-ethical-sponsorship-of-cultural-institutions/>; For another example of visitors protesting corporate sponsors, see “How Sackler Cash Made Museums a Target for Protests,” *The Economist*, March 28, 2019, <https://www.economist.com/international/2019/03/28/how-sackler-cash-made-museums-a-target-for-protests>.

relationships.¹³² In fact, the American Alliance of Museums, the United States' largest professional museum organization, set the national standard for best practices in corporate-museum relationships with their publication *Guidelines for Museums on Developing and Managing Business Support*.¹³³ Other notable publications include the International Council of Museums' "Code of Ethics," which encouraged museums to accept corporate funds so long as their content and integrity remained uninfluenced, and Grayling Public Relations' *Museums at the Crossroads*, which argued that corporate sponsorships are necessary for museums to meet the demand for faster content production.¹³⁴ Many of these organizations recognize that the increased need for and acceptance of corporate support is a product of changing models of funding. For example, former President of the American Association of Museums Ford W. Bell stated that decreased appropriations from state and local governments as well as the lasting effects of the Great Recession forced museums to "display their entrepreneurial side," which included creating new monetary relationships with the private sector.¹³⁵

In North Carolina, the uptick in corporate-museum relationships during the twenty-first century has produced both positive and negative effects. In some instances, partnerships between museums and corporations can improve both parties' public image. Audiences tend to favor corporate-museum relationships that they perceive as more authentic, such as those with small and local businesses or those that emphasize shared history or values.¹³⁶ This was certainly true

¹³² For a sustained evaluation and critique of corporate-museum relationships and their effect on culture, art, and cultural institutions, see Mark W. Rectanus, *Culture Incorporated: Museums, Artists, and Corporate Sponsorships* (Minneapolis: University of Minnesota Press, 2002).

¹³³ American Association of Museums Ethics Committee, et al., *Guidelines for Museums on Developing and Managing Business Support* (Washington, DC: American Alliance of Museums, 2001).

¹³⁴ International Council of Museums, "Code of Ethics," 2017, accessed December 9, 2022, <https://icom.museum/wp-content/uploads/2018/07/ICOM-code-En-web.pdf>; Anastasia Elaeva, *Museums at the Crossroads: The Role of Corporate Partnerships* (Moscow: Grayling, 2019).

¹³⁵ Bell, "How Are Museums Supported Financially in the U.S.?" 1.

¹³⁶ Veronica Ferrari, "Paving the Way for Ethical Sponsorship of Cultural Institutions."

for Tryon Palace in 2010 when PepsiCo., which was founded just down the street from the museum in downtown New Bern, North Carolina, partially sponsored the museum's new History Center. The partnership, which was part of a multi-decade-long capital campaign, helped the museum afford millions in high-tech upgrades. As part of the partnership, Tryon Palace named one section of its new museum the Pepsi Family Center.¹³⁷ In other places this partnership may have come across as disingenuous due to the company's international status, but because of Pepsi's unique history with New Bern it was received positively.

While corporate sponsorships are an effective way for museums to garner much-needed funds, they also can also endanger a museum's ability to self-govern. In order to arrange sponsorships, corporate donors typically want to see that museums are pursuing a diverse range of funding opportunities, that they have well-laid plans for future projects, and that their programming is compatible with the public image the corporation wants to uphold. The downward trends in revenue during the twenty-first century make meeting these high stakes demands even more difficult. Changing models of funding also suggests that corporations now have more power to control how a museum operates. Due to dire financial need and resource scarcity, museums may feel pressured to comply with corporate demands.¹³⁸ In times of financial peril, some museums will have to choose between their autonomy and funding that will keep them alive.

The shift from the traditional model of funding to the neoliberal model has produced three main side effects: decreased quality of content, inability to recruit and retain staff, and increased reliance on revenue from auxiliary services. Professionals at history museums in North

¹³⁷ Ben Steelman, "N.C. History Center Will Serve as a Portal to New Bern Historic Sites," *Star-News*, October 30, 2010, <https://www.starnewsonline.com/story/news/2010/10/30/nc-history-center-will-serve-as-a-portal-to-new-bern-historic-sites/30844533007/>.

¹³⁸ "Bossy Sponsors: American Museums," *The Economist (London)* 331, no. 7861 (1994): 124.

Carolina stated that defunding and underfunding has had a significant impact on content quality and their ability to facilitate successful programming. Out of the eight respondents, six indicated that insufficient funds have prevented them from creating newer and better exhibits. Three of the seven specifically referenced the amount of time that has passed since they have last been able to update their displays and exhibits. One director of a small nonprofit museum stated that their display cases are over twenty years old, while a site manager at a state-owned historic site and museum revealed that their “exhibits have remained the same since the late 1980’s.”¹³⁹

Employees at these museums expressed their dissatisfaction with the fact that they do not have the money or staff to create immersive exhibits that would help their museums thrive. They listed outdated historic narratives, subpar graphics, “text heavy panels,” “old fashioned boxy display cases,” and a lack of interactive elements as just some of the things that detract from the visitor experience.¹⁴⁰ The vast majority of the museum workers surveyed stated that they have witnessed the effects of underfunding and defunding on their museum’s content and programming, which indicates that this problem is widespread.

The quality of a museum's content is closely tied to their ability to hire and retain adequate staff. All but one of the respondents stated that their museum experiences issues related to staffing and wages. Their problems range from not being able to afford part-time workers to not having the budget to adequately compensate their full-time staff members. Several of the respondents indicated that insufficient funding prevents them from offering competitive salaries compared to the private sector, which makes it difficult to recruit and retain experienced staff.

¹³⁹ Anonymous Interviewee #4, Questionnaire Response to Author, November 16, 2022; Anonymous Interviewee #5, Questionnaire Response to Author, December 8, 2022.

¹⁴⁰ Anonymous Interviewee #4, Questionnaire Response to Author, November 16, 2022; Anonymous Interviewee #3, Questionnaire Response to Author, September 26th, 2022; Anonymous Interviewee #6, Questionnaire Response to Author, December 6, 2022.

Employees at state-owned museums were especially outspoken about the meagerness of state-sponsored salaries. Staff at one state-owned museum revealed that after the legislature cut the bulk of their funding in 2011, they were forced to lay off their entire curatorial team. This meant that their collections team had to assume all of the curatorial responsibilities as well as their usual duties. The executive director of the museum stated that they “could do much more programming and outreach with a full staff,” while another employee said that they do not have the staff capacity to host the amount of field trips they once did.¹⁴¹ Their responses indicate that there is a direct correlation between funding, staffing, and content quality. When a museum has adequate funding, they can offer fair and competitive wages. This then in turn improves the quality of content because employees have the resources they need to achieve maximum productivity and are incentivized to stay with the company to develop their skills. A satisfied workforce produces better content, which then attracts more visitors.

One of the strategies that museums have used to mitigate the effects of underfunding and defunding is to supplement their revenue with earned income from auxiliary services. For the purpose of this paper, auxiliary services are defined as commercial offerings that are not a part of the traditional services that museums offer, such as exhibits and educational programs. For instance, it is more popular than ever for museums to advertise their gallery spaces, conference rooms, or grounds as rental venues. This practice has become so prevalent among museums that the American Alliance of Museums even developed a best practices guide for organizations that rent their facilities to the public.¹⁴² In fact, out of the twenty history museums from figures 3 and

¹⁴¹ Anonymous Interviewee #2, Questionnaire Response to Author, October 17, 2022; Anonymous Interviewee #1, Questionnaire Response to Author, October 28, 2022.

¹⁴² “Renting Museum Facilities for Events,” *American Alliance of Museums Magazine*, July 1, 2011, <https://www.aam-us.org/2011/07/01/renting-museum-facilities-for-events/>.

5a, thirteen advertise their museum as a rental space.¹⁴³ (The Museum of the Albemarle uses a particularly catchy slogan to entice visitors to use their rental services: “Say ‘I Do’ to History.”)¹⁴⁴ However, there are ethical concerns that arise when a space that was made for education and acculturation becomes a place for parties and weddings. Museums risk property damage and contamination when they allow outside materials, foodstuffs, and people into their facility. Most importantly though, when museums have to rely on auxiliary services for revenue their focus is removed from being trusted educators and purveyors of history. One director even expressed embarrassment that their museum depends on event rentals for the majority of their income because it takes time and resources away from “revenue streams that speak more realistically about what we do here.”¹⁴⁵ The fact that museums offer auxiliary services is not concerning in and of itself, but it is concerning that these services often detract from more traditional and mission-based programming.

THE COMMERCIALIZATION AND COMMODIFICATION OF THE HISTORY MUSEUM

¹⁴³ “Rent the Museum,” North Carolina Museum of History, accessed April 18, 2023, <https://www.ncmuseumofhistory.org/rent-museum>; “Renting Our Facilities,” Museum of the Albemarle, accessed December 10, 2022, <https://www.museumofthealbemarle.com/rent-museum>; “Rent the Museum,” Mountain Gateway Museum, accessed April 18, 2023, <https://www.mgmnc.org/about-us/rent-museum>; “2020-21 Event Planning Guide for the North Carolina Maritime Museum Beaufort, NC,” North Carolina Maritime Museum Beaufort, accessed April 18, 2023, <https://ncmaritimemuseumbeaufort.com/wp-content/uploads/2020/02/ncmm-event-planning-guide-2020-21.pdf>; “Shell-e-brations,” North Carolina Maritime Museum at South Port, accessed April 18, 2023, <https://ncmaritimemuseumsouthport.com/facility-rentals/shell-e-brations/>; “Contact Us- Rent the Museum,” Old Salem, accessed April 18, 2023, <https://www.oldsalem.org/contact-us/>; “Rent the Museum,” Greensboro History Museum, accessed April 18, 2023, <https://greensborohistory.org/about-us/rent>; “Rentals,” International Civil Rights Center & Museum, accessed April 18, 2023, <https://www.sitinmovement.org/rentals>; “Rental Info,” Museum of Durham History, accessed April 18, 2023, <https://www.museumofdurhamhistory.org/visit/rental-info/>; “Venue Rental,” Wilmington Railroad Museum, accessed April 18, 2023, <https://www.wrrm.org/venue-rental.html#/>; “Site Rentals,” Charlotte Museum of History, accessed April 18, 2023, <https://charlottemuseum.org/site-rentals/>; “Grounds Use Policy,” Wake Forest Historical Museum, accessed April 18, 2023, https://wakeforestmuseum.org/?page_id=4138; “Contact & Admission,” New Bern Firemen's Museum, accessed April 18, 2023, <https://www.newbernfiremuseum.com/contact-admission>.

¹⁴⁴ “Renting Our Facilities,” Museum of the Albemarle.

¹⁴⁵ Anonymous Interviewee #3, Questionnaire Response to Author, September 26th, 2022.

One of the ways that a select few history museums have found success in the neoliberal era—despite its profoundly harmful effects at most other institutions— is through commercialization and commodification. Two of the most prominent examples of this in North Carolina are Biltmore Estate in Asheville and Old Salem Museum and Gardens in Winston Salem. Though Biltmore markets itself as a house museum, it is a private for-profit business more akin to an amusement park or a shopping mall than a traditional cultural institution. For this reason, extensive analysis of its operations will be omitted from this study. Old Salem, however, is a nonprofit open-air museum and one of the premier cultural institutions in North Carolina. The museum explores nearly two centuries of Moravian, African American, and Native American history and culture through twenty-three different structures across the Old Salem Historic District. Since opening in 1950, Old Salem has continued to be one of the most lucrative museums in North Carolina. In fact, Old Salem’s average revenue is over ten times that of other nonprofit history museums in the state (see figure 5a). Part of their success stems from their ability to compete with other cultural organizations for large donations and grants— with the millions the museum garnered from the NEH being a prime example of this.

However, Old Salem’s aptitude for marketing and sales also makes them remarkable compared to other museums in the state. Unlike conventional history museums, whose commercial products are usually limited to tickets and gift shop wares, Old Salem offers a plethora of merchandise, retail shopping, and paid experiences to their visitors. While it is free to wander the seventy-five-acre historic district, in order to access the museum's exhibits visitors must purchase tickets. Old Salem employs a tier system for their ticket sales: \$27 buys visitors an all-inclusive experience, while \$18 buys a pass into the Frank L. Horton Museum Center and

just two of the other seven ticketed exhibits.¹⁴⁶ At Christmas, Old Salem's busiest time of year, tickets get even more expensive. The rate that the museum charges reveal the demand for their products; all-inclusive tickets at Old Salem are almost four times the median price of museum admission in the United States.¹⁴⁷ Along with spending money on tickets, guests are encouraged to visit several prime shopping locations, including three restaurants and cafes, one bakery, two gift shops, one bookstore, and two inns. Though not all of these commercial entities directly fund the museum, they are all used as a marketing tool to encourage visitation and incentivize spending at the site.¹⁴⁸

The example that Old Salem sets for other museums is both inspiring and concerning. On one hand Old Salem's financial success allows them to support a range of education and research programs, but on the other hand one must wonder if the commodification of the site detracts from its scholarly integrity.¹⁴⁹ Do people visit Old Salem to learn about its history or do they go for the food, shopping, and upscale lodgings? And conversely, is the site directed at educating the public or getting them to spend their money? Certainly, the answer to these questions is that both are true, but at what point do the commercial aspects supersede the historic ones? Museums must consider these questions when they look to Old Salem and other similar organizations as models for success. Since it is unlikely that the neoliberal era will end anytime soon, museums should critically examine the commercial ventures available to them and choose only those that

¹⁴⁶ "Ticket Information," Old Salem, accessed April 18, 2023, <https://www.oldsalem.org/ticket-information/>; "Open Venues & Time," Old Salem, accessed April 18, 2023, <https://www.oldsalem.org/open-venues-and-time/>.

¹⁴⁷ "Annual Condition of Museums and the Economy," *American Alliance of Museums*, April 2013, <https://www.aam-us.org/wp-content/uploads/2018/01/acme-2013-final.pdf>.

¹⁴⁸ "Eat, Shop, & Stay," Old Salem, accessed April 18, 2023, <https://www.oldsalem.org/eat-shop-stay/>.

¹⁴⁹ In "Diversification of Revenue Strategies: Evolving Resource Dependence in Nonprofit Organizations," Karen A. Froelich illuminates the various ways that nonprofits are expanding their commercial holdings to supplement traditional funding sources in times of scarcity, *Nonprofit and Voluntary Sector Quarterly* 28, no. 3 (1999): 245-367.

align with their missions. Surely there is a compromise between the history museum as a shopping mall and the end of the history museum altogether.

The financial data and questionnaire responses indicate that decreases in private donations and apathetic treatment at the hands of the Federal and State Government have put most history museums into crisis mode. In North Carolina, budget cuts to cultural institutions began during the early 1980s and intensified during the mid to late 1990s. In 2010, when the General Assembly gained a persistent Republican majority, funding cuts to museums became entrenched and continued even after the economy recovered from the Great Recession. Neoliberal ideology has been a significant factor in the shift from traditional models of funding to contemporary models of funding. Similar to the defunding of the NEH between 1980 and 1996, since 2010 the North Carolina General Assembly has adhered to policies that minimized the State Government's role in cultural organizations. These actions, coupled with reduced private donations during and after the Great Recession, forced museums to change funding models. While state-owned museums still get most of their income from the state budget, nonprofit fundraising and earned income are now a much more prominent part of their funding. The effects are even more evident at nonprofit museums, where earned income and/or corporate sponsorships have, in many cases, supplanted private donations. Even though museums have adapted to these changes, revenue at both state-owned and nonprofit museums remains well below what it was during the mid-2000s. This hands-off approach to funding at the state level fails to recognize the inherent value of the history museum as a place of education, acculturation, and community.

While it is necessary to recognize that neoliberal influenced economic policies catalyzed shifts in funding models at history museums, it is more important to note the detrimental effects.

Draconian budget cuts, reduced revenue, inability to recruit and retain qualified staff, outdated displays, and lower quality exhibits are all connected to the incursion of neoliberal influenced policies that began in the 1980s. Furthermore, in order to cope with resource scarcity, it is becoming more common for museums to establish potentially harmful donor relationships with the private sector. In order to secure vital funds, museums have become more like the private-sector businesses they rely on. They must market to their audience base, which at times includes offering auxiliary services even when they detract from the museum's purpose. They must create diversified streams of income, not only to interest prospective funders who want to see them generating profit, but also because cobbling together motley sources of income is the only way that they stand a chance of survival. Indeed, the neoliberal era has spelled disaster and misfortune, and perhaps even death, for the history museum. The weight of these developments lies with the Federal and State Government, whose neoliberal influenced policies have undoubtedly exacerbated financial crises at history museums.

CHAPTER TWO

FROM PUBLIC, TO PRIVATE, TO GONE: HOW SYSTEMS OF FUNDING SHAPE FINANCIAL SUCCESS AND FAILURE AT HISTORY MUSEUMS

During the Great Recession Ernest Dollar served as the executive director of the Preservation Society of Chapel Hill, where he also witnessed the last days of the town's local history museum.¹⁵⁰ The Chapel Hill Museum began as a nonprofit history museum in Chapel Hill, North Carolina, born out of the town's bicentennial celebration in 1993. From its inception the museum maintained a close relationship with the town's government, which intended for the museum "to support [the] revitalization of [Chapel Hill's] downtown and be an integral part of the Town's focus on culture as a revenue generator."¹⁵¹ After opening to the public in 1996, the museum garnered around 15,000 visitors annually and enjoyed both the support of the town's affluent community and its proximity to the University of North Carolina at Chapel Hill.¹⁵² In sum, the Chapel Hill Museum seemed to have all of the necessary components for financial success. However, when the Great Recession hit the small town in 2008, the museum faced and ultimately succumbed to financial ruin.

In an open letter posted on the museum's now deactivated website, an anonymous representative stated that since the beginning of the Great Recession two years prior the museum had struggled to pay bills and maintain operations. In an attempt to avoid a permanent shutdown, leaders at the museum approached the Town Council and requested \$34,250 in appropriations, "or less than 1/10 of 1% of the Town's annual budget," to help pay for their upkeep and

¹⁵⁰ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

¹⁵¹ Editor/Unknown Author, "Chapel Hill Museum to Close on July 11," *Museum Publicity*, July 5, 2010, <https://museumpublicity.com/2010/07/05/chapel-hill-museum-to-close-on-july-11/>.

¹⁵² Ed Morgan, *Raleigh, Durham, Chapel Hill: A Photographic Portrait* (Rockport, MA: Twin Lights Publishers, Inc., 2011), 107-108.

utilities.¹⁵³ The letter mentions that in the past the museum had complied with the town's every request, in which they "completed the Town's twice annual measurable standards since 2006, provide[d] open access to finances, and [met] all requirements stated in the Museum's lease with the Town."¹⁵⁴ In light of their past relationship, museum leaders expressed hope that the town would not only approve their request for emergency funds but also assume ownership of the museum in the near future. Despite their efforts, the town denied both requests. While the Town Council did agree to spare some funds for the museum, the appropriations they allotted were not nearly enough to mitigate the loss of support from "long-time donors, foundations, and sponsors" that occurred as a result of the recession.¹⁵⁵ By July of 2010, the museum had no other choice but to close its doors forever.

Dollar, who kept close tabs on the story as it developed, recalled being appalled at the Town Council's actions. "When the Chapel Hill Museum was closing," said Dollar, "I was beating my head against the wall saying 'how could Chapel Hill, [home of the] first state university, [with] such an affluent community who understands the value of the past, let this go down?'" In the aftermath of the shutdown, Dollar watched in horror as the museum was forced to auction off their collection of historical artifacts, many of which came from local families. In Dollar's opinion, "the worst thing you [can] do in a museum is to [betray] people who trust in you to keep [their] family artifacts in perpetuity." However, Dollar does not blame the Chapel Hill Museum for their actions. Rather, he said that the event "shows that [the town] did not feel that [the museum] was a necessary or needed part of the community." For Dollar, the Chapel Hill Museum is a prime example of how the nonprofit system of funding often fails to produce

¹⁵³ Editor/Unknown Author, "Chapel Hill Museum to Close on July 11."

¹⁵⁴ Editor/Unknown Author, "Chapel Hill Museum to Close on July 11."

¹⁵⁵ Editor/Unknown Author, "Chapel Hill Museum to Close on July 11."

financially successful history museums. In his experience, “it’s harder for nonprofits to succeed because... there are so many variables to their budgets.”¹⁵⁶ Dollar’s assessment of financial success at nonprofits— or lack thereof— is echoed in much of my own findings on museum funding in North Carolina.

Though the nonprofit system of funding is the conventional model for history museums in North Carolina, it is also the least effective. Not only do nonprofit museums experience all of the same effects of underfunding as state-owned and municipal museums (see the previous chapter, “History for Sale,” for more in-depth explanation), they also often have less staff, lower wages, worse facility conditions, less total revenue, and, in general, are more at risk for permanent closure due to financial constraints. One reason for this is that the donations, grants, and earned income that nonprofit museums subsist on are less reliable than the yearly— and typically guaranteed— appropriations that state-owned and municipal museums receive. In addition, all of the state-owned and municipal museums studied also have associated nonprofit organizations, which allows them to accrue revenue from both funding systems. The result is that the nonprofit system of funding is inherently less effective than both the state-owned and municipal systems.

To substantiate this argument an exploration of the effects of underfunding was examined in three case studies. The findings are based on interviews conducted with the executive directors of three history museums, all of which use different systems of funding, as well as financial data collected from each institution. The featured museums are the Wilmington Railroad Museum (nonprofit), Tryon Palace Historic Sites & Gardens (state-owned), and the City of Raleigh

¹⁵⁶ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

Museum (municipal). The case studies focus on the twenty-first century because that is the period from which the majority of the interviewees' knowledge and experience stems. Though the case studies are separated by the funding system they represent, all of the directors have first-hand knowledge about or experience with two or more funding systems and so their commentary has been incorporated when relevant. The findings in these case studies offer a sustained critique of neoliberal ideology, the policies that it influences, and its negative effects on museum funding. The following is in no way meant to disparage the interviewees or the featured museums. In fact, these case studies hopefully display the sheer talent, wit, and determination that museum staff exhibit in the face of current and past funding crises.

NONPROFIT MUSEUMS: FIGHTING AN UPHILL BATTLE

Holli Saperstein, the current executive director of the Wilmington Railroad Museum, worked in the corporate world for over two decades before she first ventured into nonprofit management in 2014.¹⁵⁷ For many who have worked at charitable organizations this will seem like an odd transition; usually people flee from nonprofits to corporations, not the other way around. However, Saperstein contended that even though nonprofits are often underfunded, and nonprofit history museums perhaps even more so, there is “a general sense of goodwill from the public towards nonprofits,” that gives her hope.¹⁵⁸ Saperstein arrived at the Wilmington Railroad Museum in 2019 with virtually no experience in the museum industry but has since set forth a lofty track record of improvements. During her relatively short tenure she has cultivated

¹⁵⁷ John Staton, “Making a Splash with Panache: After 25 Years Away from Theater, Holli Saperstein Jumps Back in with Both Feet,” *Star-News*, August 15, 2019, <https://www.starnewsonline.com/story/entertainment/local/2019/08/15/after-25-years-away-from-theater-holli-saperstein-jumps-back-in-with-both-feet/4461510007/>.

¹⁵⁸ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

advances in attendance, gift shop revenue, and, in the last two years, a shift towards better overall financial health at the museum. Even still, funding at the Wilmington Railroad Museum has not always been so lucrative, and Saperstein thinks that if the COVID-19 Recession gets much worse that the museum may be in grave danger. “If I am concerned,” she said of the recession, “donors are concerned. So, they are going to hold tighter to their purse strings.”¹⁵⁹ As Saperstein’s interview revealed, underfunding at nonprofit history museums is akin to fighting an uphill battle. Though the museum’s practitioners may be both talented and hardworking, their content interesting, and their funders willing, the nonprofit system generally does not produce prolonged financial success. The following case study provides a brief history of the museum going back to the nineteenth century as well as Saperstein’s testimony and extensive quantitative financial data to expand on this argument.

During the Civil War, the Wilmington & Weldon Railroad (W&W) was one of the main supply and transportation lines for Confederate troops in North Carolina. Unlike many other railroad companies at the time, the W&W lines were largely unscathed during the early years of the war which allowed the company to generate considerable profits. Though the company sustained heavy damages near the end of the war, W&W went on to rebuild and then maintain successful operations throughout the post-war period.¹⁶⁰ In 1900, W&W merged with the Atlantic Coast Line Railroad (ACL), who had recently acquired several other smaller rail lines along the East Coast. To complete their business venture, the ACL Company settled its headquarters in Wilmington, North Carolina, and began using the northern half of the former

¹⁵⁹ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

¹⁶⁰ James C. Burke, *The Wilmington & Weldon Railroad in the Civil War* (Jefferson, NC: McFarland, 2012).

W&W Railroad as part of its main line.¹⁶¹ For over 125 years the railroad industry held dominion over the port city, with ACL at its head. During its height, railroad companies employed one out of every three people in Wilmington and occupied the entire north end of the city. This all changed in 1960, when ACL relocated its headquarters from Wilmington to Jacksonville, Florida, along with 1,000 employees and their families. With its main industry and a significant portion of its workforce gone, the entirety of New Hanover County faced a devastating economic blow.¹⁶²

In the tumultuous years after ACL's departure, Wilmington's railroad legacy was in danger of fading into obscurity until three local women, Hazel Kimrey Morse, Gerda Quelch Wootten, and Marguerite James, banded together in 1979 to form the Wilmington Railroad Museum.¹⁶³ The trio first displayed their collection of ACL artifacts at former Governor Edward Dudley's mansion, but by 1983 the museum had taken residence in a former ACL Freight Office Building.¹⁶⁴ After almost a quarter century in their original accommodations, the museum moved into an 1883 railroad freight warehouse where it has remained since 2007.¹⁶⁵ During its forty-four year history the museum has continued to build their artifact collection, conduct research, and educate the public on the history of Wilmington's railroad industry. Since 1980 the museum

¹⁶¹ George A. Kennedy, "Wilmington & Weldon Railroad," in *Encyclopedia of North Carolina*, ed. William S. Powell (Chapel Hill: The University of North Carolina Press, 2006), <https://www.ncpedia.org/wilmington-weldon-railroad>.

¹⁶² Holli Saperstein, "History of The Wilmington Railroad Museum," interview by Rebekah Carmichael, YouTube, August 22, 2020, <https://www.youtube.com/watch?v=CxDNmiRhm9U>.

¹⁶³ Holli Saperstein (executive director of the Wilmington Railroad Museum), email to author, March 13, 2023.

¹⁶⁴ The Wilmington Railroad Museum maintains a public FaceBook page with many avid fans. In 2015, on a FaceBook post commemorating the museum's thirty-five-year anniversary, user Missy Aslund stated, "I remember when my mother, Gerda Wootten and friends Hazel Morse and Marguerite James had the first display at the Governor Dudley mansion," as found in "What were you doing 35 years ago?" Wilmington Railroad FaceBook Group, FaceBook, August 27, 2014, <https://www.facebook.com/profile/100063862021158/search/?q=dudley>; "A Brief History of the Wilmington Railroad Museum," Wilmington Railroad Museum, last modified 2018, https://www.wrrm.org/history.html#.

¹⁶⁵ "A Brief History of the Wilmington Railroad Museum," Wilmington Railroad Museum.

has operated as a tax exempt 501(c)3 nonprofit organization that draws the vast majority of its revenue from earned income, supplemented by donations and grants.¹⁶⁶

During the interview, Saperstein provided a breakdown of the museum's approximate earnings during recent years. The museum's largest revenue stream is and has always been ticket sales, which currently make up 54% of total income. Visitors to the museum pay \$10 for adult admission, \$7 for military and seniors, \$6 for children, and \$0 for children under the age of three. Since Saperstein became the director, the museum raised admission prices around 40% (from \$7 for an adult ticket to \$10), but she maintained that the Wilmington Railroad Museum cost much less than most other nonprofit museums in the area. She estimated that similar institutions charge around \$17-\$25 for admission, which is 70% to 150% more expensive. The next largest revenue stream is gift shop sales at 23%. In addition to their usual wares, such as t-shirts, toys, and other baubles, the museum also repairs and sells donated model trains, which alone make up 7% of all gift shop sales. Between 8% and 10% of the museum's annual revenue comes from highly competitive grants, mostly from local charitable organizations such as the Landfall Foundation.¹⁶⁷ Membership dues from individuals and businesses make up the next largest portion of donation-based earnings at 7-8% annually.¹⁶⁸ The dues range from \$50 to \$1000 or more per year depending on the buyer's desired package deal or sponsorship level.¹⁶⁹ The museum lists Sam's Club, CSX Transportation, and Walmart as its main business sponsors.¹⁷⁰

¹⁶⁶ "Wilmington Railroad Museum Foundation INC: Tax Filings by Year," Nonprofit Explorer, ProPublica, last modified November 24, 2020, <https://projects.propublica.org/nonprofits/organizations/561537564/>.

¹⁶⁷ "Museum Supporters," Wilmington Railroad Museum, accessed April 18, 2023, https://www.wrrm.org/supporters.html#.

¹⁶⁸ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

¹⁶⁹ "Museum Membership," Wilmington Railroad Museum, accessed March 22, 2023, https://www.wrrm.org/membership.html#.

¹⁷⁰ "Museum Supporters," Wilmington Railroad Museum.

Fundraising events, such as the museum's *Polar Express* Christmas event, are the smallest source of funding at 7% of total revenue.¹⁷¹

The museum does not receive any consistent amount of public dollars from the state, county, or city government. In fact, the museum pays around \$42,000 per year in rent to the city of Wilmington to use the historic ACL freight warehouse as a gallery space. Saperstein estimated that around ten similarly situated nonprofits in Wilmington have “sweetheart deals” with Wilmington City Government or New Hanover County Government, which allows those organizations to rent out underutilized or vacant buildings for a nominal fee of, for example, \$1 per year. Saperstein stated that the city's rent prices are one of the largest financial burdens the museum faces each year.¹⁷² For instance, in 2019 the museum used approximately 21.6% of its total revenue to satisfy rent payments.¹⁷³ Saperstein said that she is currently in negotiations with the city government to arrange a lease agreement that would reduce these costs.¹⁷⁴

¹⁷¹ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

¹⁷² Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

¹⁷³ For the Wilmington Railroad Museum's total revenue from FY 2019, see “Wilmington Railroad Museum Foundation INC: Form 990 for Period Ending March 2019,” Nonprofit Explorer, ProPublica, last modified March 25, 2020, https://projects.propublica.org/nonprofits/display_990/561537564/03_2021_prefixes_52-57%2F561537564_201903_990_2021032317819753.

¹⁷⁴ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.



FIGURE 6: Wilmington Railroad Museum Total Revenue (2002-2020). This figure denotes yearly total revenue in inflation adjusted 2022 USD.¹⁷⁵



FIGURE 7: Wilmington Railroad Museum Net Income (2002-2020). This figure denotes yearly net income in inflation adjusted 2022 USD.¹⁷⁶

¹⁷⁵ For the data set from figure 6, see “Wilmington Railroad Museum Foundation INC,” Nonprofit Explorer, ProPublica, last modified November 24, 2020, <https://projects.propublica.org/nonprofits/organizations/561537564>. See also Appendix G.

¹⁷⁶ For the data set from figure 7, see “Wilmington Railroad Museum Foundation INC: Tax Filings by Year,” Nonprofit Explorer, ProPublica, last modified November 24, 2020, <https://projects.propublica.org/nonprofits/organizations/561537564/>. See also Appendix H.

The Wilmington Railroad Museum's net income (total revenue minus total expenses) from the twenty-first century indicates that the museum experienced significant and extended periods of underfunding. Between FYs 2002 and 2009, the Wilmington Railroad Museum's average yearly revenue amounted to \$175,972.20 (2022 USD) per year, but after FY 2010 it jumped 21.8% to \$214,310.30 (2022 USD). In total, revenue at the museum increased approximately 55% between FYs 2002 and 2020. Both the decade-to-decade comparison and the overall increase reveal that the museum's total revenue continued to grow throughout the twenty-first century. When considered individually these findings suggest that the museum made significant financial gains during this period. However, in eleven out of eighteen of those years the museum generated a negative net income, meaning that their total expenses outweighed their total revenue. Though many people think that nonprofits are not supposed to have any significant net revenue, Saperstein revealed that it is crucial for nonprofits to keep a healthy checking balance. In the past when net revenue went into the negative, the museum was often forced to dip into its emergency trust to be able to cover bills and payroll.¹⁷⁷ When coupled with Saperstein's testimony, these metrics indicate the Wilmington Railroad Museum has experienced sustained periods of moderate to severe underfunding for at least two decades.

One way that underfunding impacts the Wilmington Railroad Museum is through staff size, turnover, and experience. In addition to Saperstein, the museum employs one other full-time staff member and around three part-time interns, most of which are graduate students at the nearby University of North Carolina at Wilmington. Saperstein's most prominent staffing issue is that the museum cannot afford to hire an optimal number of staff members. This creates an

¹⁷⁷ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

uneven workload distribution, meaning that the current employees must do extra work to make up for the deficit. Saperstein described the executive director position as a catch-all for tasks around the museum that, in an ideal work environment, would be delegated to other employees, “because of our limited staffing... I wear a lot of hats.” She listed “executive director, development, social media, public outreach, [and] education coordinator,” as just a few of the many responsibilities she handles as a result of budget constraints. Saperstein went on to state that if the museum had adequate funding, she would hire a full-time curator or archivist rather than take on those tasks herself or assign them to her interns, who, despite their willingness, typically lack the time and training that a seasoned professional could contribute. While Saperstein said that she enjoys having graduate students work at the museum, she also observed that they are highly transient. In her experience, graduate interns typically do not stay with the railroad museum after graduation, but rather migrate to “big museums” that can afford to pay higher wages and offer full-time hours. Saperstein reported that the museum’s undersupply of fully trained, full-time staff members also prevents the museum from creating new content, “what lacks because of the inadequate amount of payroll hours and staffing and just the cost of redoing exhibits... is that a lot of [the] displays are in some significant need of updating.”¹⁷⁸

While Saperstein knows that updating the content and display cases would provide guests with more accurate and engaging historical content, the cost of such changes, which are often upwards of five figures, prevents her or anyone else at the museum from acting. When Saperstein arrived at the museum, she learned that past staff had obtained many of the display cases secondhand from department stores and that they are over twenty years old. Even though

¹⁷⁸ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

the displays are outdated, Saperstein said that funding prevents her from purchasing the type of aesthetically pleasing and interactive equipment that other museums have access to. In addition, the funding the museum receives directly relates to the quality of content the staff can produce. “If I had great funding,” said Saperstein, “my cases would be a better narrative for the public. I could teach more; I could show more.” The content at the museum often falls behind developments and paradigm shifts within the public history field. For example, the museum’s display case on the roles of Black people in the railroad industry has not been updated for sixteen years and “does not reflect today’s climate and today’s narrative” about Black history. One particularly concerning detail is that the display has no mention of the impacts of slavery even though enslaved laborers were instrumental in the creation of the railroad industry in Wilmington. Saperstein said that when she walks by outdated content at the museum, such as the case on Black history or women’s history, “it just makes me think about money.”¹⁷⁹

Another of Saperstein’s main concerns is the deteriorating facility condition at the museum. Though the city of Wilmington owns the 140-year-old freight warehouse, they do not cover the cost of all of the updates and maintenance that the building needs. This means that when the aging property needs repairs it often comes directly out of the museum’s already tight budget. Saperstein said that the museum’s HVAC system, which controls the temperature, humidity, and air purity in the building, is an example of a major renovation that she will have to finance in the near future. HVAC systems in particular are important tools that museums use to ensure the safety of their collections. If the HVAC system malfunctions before Saperstein can find the funds to repair it, it could result in thousands of dollars of damage to the museum’s

¹⁷⁹ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

prized collection. In addition to potential property damage, facility conditions at the museum also prevent them from leasing exhibits or borrowing artifacts from many other cultural institutions. Saperstein said that there are multiple organizations that the Wilmington Railroad Museum would like to collaborate with but cannot because their facility does not meet the necessary requirements. The director also divulged that the facility conditions at the Wilmington Railroad Museum are vastly different from the municipal museums in the Wilmington area. For example, the curator at the Cape Fear Museum, which is funded by New Hanover County, can check the humidity levels at the museum via an app on their smartphone, which is a luxury that Saperstein would love to have but cannot currently afford.¹⁸⁰

Since the Great Recession museums have increasingly relied on granting institutions to fill in budget gaps, but Saperstein claimed that the high level of competition between nonprofits makes securing that money all the more difficult. Saperstein estimated that the Wilmington Railroad Museum receives between \$12,000 to \$15,000 per year in grants, but that grants “are actually one of the smaller funding sources for [the museum] even on a good year.” Even so, Saperstein still aggressively pursues grant opportunities, especially for specific needs such as with the HVAC system. The main reason that grants are not a larger revenue stream for the museum is because of the steep competition between charitable organizations, “as a nonprofit, a big disadvantage is that you are competing with all sorts of other nonprofit organizations, and I don’t mean just museums... there’s all sorts of places that people can give [to] and [that] foundations can give [to].” In one example of the level of competition between nonprofits, Saperstein recalled speaking to several museum directors in the Wilmington area who all applied

¹⁸⁰ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

for the same grant from a local foundation, “none of us got that money, it all went to other nonprofits in town with differing objectives.”¹⁸¹ Saperstein went on to list organizations for children, impoverished people, and un-homed people as some of the main competitors that nonprofit history museums have to contend with when applying for grants.

IMLS Grants to NC Museums (FYs 1997-2022)

TABLE 2: IMLS Grants to NC Museums (FYs 1997-2022).¹⁸²

Type of Museum	# of Museums that Received IMLS Grants	# of Grants	Combined Dollar Value
Art	31	72	\$4,616,142.00
Children's	7	15	\$1,929,615.00
History	50	71	\$2,827,846.00
Science/ Nat. Science	11	36	\$3,829,207.00
Total	99	194	\$13,202,810.00

Even within the museum industry there is a hierarchy among cultural organizations in terms of grant opportunities.¹⁸³ Saperstein said that “organizations that are associated with children do far better [in terms of securing grants]. A children’s museum is going to have an

¹⁸¹ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

¹⁸² For the data set from table 2, see “Search Awarded Grants,” NC, Office of Museum Services, FYs 1997-2022, Institute of Museum and Library Services, last modified 2022, <https://shorturl.at/hstJR>. Grants to zoos, aquariums, wildlife conservation/rehabilitation centers, gardens, and arboretums as well as some grants to commissions, councils, associations, departments, foundations, universities, institutes, and sovereign nations have been excluded from the count on the basis that these institutions do not fit within the typical scope of an art, children’s, history, or science museum or they do not host permanent exhibits.

¹⁸³ There is much debate among scholars of nonprofit studies, management, and policy on whether government funds incentivize or impede private giving. To see sustained analysis of “crowd out” versus “crowd in” theories see Daniel Tinkelman and Daniel Gordon Neely, “Revenue interactions: crowding out, crowding in, or neither?” in *Handbook of Research on Nonprofit Economics and Management*, Eds. Bruce A. Seaman and Dennis R. Young (Cheltenham: Edward Elgar Publishing Limited, 2018) and Arthur C. Brooks, “Public Subsidies and Charitable Giving: Crowding Out, Crowding In, or Both?” *Journal of Policy Analysis and Management* 19, no. 2 (2000): 451-464.

easier time fundraising than, let's say, a house museum.”¹⁸⁴ In order to be competitive, Saperstein emphasizes to donors the extensive amount of children’s programming the Wilmington Railroad Museum offers. Data from the Institute of Museum and Library Services (IMLS) corroborates Saperstein’s observations. From FYs 1997 to 2022, children’s museums made up only 7% percent of museums in North Carolina that received IMLS grants and yet they collected 14.61% of the total value of those federal funds. This is also true of art museums and science museums, who made up only 31% and 11% of institutions that received IMLS grants, and yet received 35% and 29% of the total value. Unsurprisingly, history museums received the least amount of grant money proportional to their presence in the state; though they represent 50% of the museums that received IMLS grants, they secured a mere 21.4% of the total value (see table 2).¹⁸⁵ Saperstein’s commentary on the effects of underfunding on staffing, content, facility conditions, and competition for grants indicates that these problems severely hinder the museum’s programming.

When asked how funding challenges differ between nonprofit museums and state-owned or municipal museums, Saperstein replied that “there is a huge difference.” In her own research she used public databases to compare staff compensation between nonprofit and state-owned museums and found that the latter typically have more robust budgets and are therefore able to offer higher wages. She also noted that people in leadership roles at state-owned museums earn “sometimes double what a private nonprofit can pay.”¹⁸⁶ Public databases that publish state, city, and nonprofit employee salaries corroborate Saperstein’s statements. For example, in 2020 Saperstein earned \$30,286, while in comparison the executive directors at the City of Raleigh

¹⁸⁴ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

¹⁸⁵ “Search Awarded Grants,” Institute of Museum and Library Services.

¹⁸⁶ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

Museum and Tryon Palace earned \$59,096 and \$101,626.46, respectively.¹⁸⁷ The larger budget that state-owned and municipal museums possess also affords them more staff. In comparison to the Wilmington Railroad Museum's staff of five, the City of Raleigh Museum has eleven employees, and Tryon Palace has fifty-four employees.¹⁸⁸ Saperstein said that though her staff is already "barebones," prolonged financial hardship could result in additional cost cutting measures, such as reduced staff positions and payroll hours.¹⁸⁹

One of the reasons that underfunding creates more severe effects at nonprofits than it does at other types of museums is because nonprofit museums rely on less reliable streams of income. Saperstein said that a benefit of being a nonprofit is that the public is generally sympathetic to their cause. Furthermore, she claimed that the museum's funders tend to recognize the museum's financial needs and mitigate them through donations, membership dues, and other charity. However, these streams of revenue are often volatile and heavily dependent on both the wellbeing of the economy and Saperstein's own marketing abilities. In contrast, she observed that state or municipal appropriations are much more reliable. "When I put together a budget," Saperstein said, "I'm hoping that the goals and metrics that I have for admissions,

¹⁸⁷ "Wilmington Railroad Museum Foundation INC: Form 990 for Period Ending March 2020, Part IV," Nonprofit Explorer, ProPublica, March 25, 2020, https://projects.propublica.org/nonprofits/display_990/561537564/06_2021_prefixes_54-58%2F561537564_202003_990EZ_2021060218243792; "Ernest Dollar A," North Carolina Employers, City of Raleigh, GovSalaries, 2020, <https://govsalaries.com/dollar-ernest-a-129279919>; "McCrea William Joseph," North Carolina State Employees, Open the Books, 2020, https://www.openthebooks.com/north-carolina-state-employees/?F_Name_S=howard%20ken&Year_S=0.

¹⁸⁸ Tryon Palace is vastly larger in both physical size and operations than the Wilmington Railroad Museum and the City of Raleigh Museum, which is one of the main contributing factors as to why it employs more staff members. However, the latter two museums are roughly the same size, which indicates that nonprofits typically have a smaller staff than other types of museums. Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023; Ernest Dollar (executive director of the COR Museum), email to author, February 28, 2023; William "Bill" McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

¹⁸⁹ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

membership, facility rentals, whatever, come through [because of] my actions,” whereas state-owned and municipal museums “know that every month their bills are paid.”¹⁹⁰ Funding at nonprofit museums is often higher stakes because a museum’s ability to generate revenue directly relates to whether or not they can afford to pay their bills and stay open, as evidenced by the demise of the Chapel Hill Museum. In Saperstein’s opinion, the same cannot be said for state-owned and municipal museums, where state and local governments subsidize the cost of operations.

STATE-OWNED MUSEUMS: THE STATE GOVERNMENT’S ROLE IN FUNDING CRISES

In 1981, William “Bill” McCrea was at the outset of his forty-year career with the North Carolina Department of Cultural Resources (NCDCCR) as the head of Architecture and Restoration for the North Carolina Division of State Historic Sites.¹⁹¹ He recalled that in the aftermath of the American Bicentennial in 1976, which was commemorated with a range of special events and exhibits, the NCDCCR increased operations at many of the state's history museums and added several new historic sites. Amid the public’s excitement about history there was a “rush of interest and money in sites associated with the [American] Revolution,” such as Tryon Palace.¹⁹² McCrea also claimed that in the late twentieth century funding at state-owned history museums and sites functioned much differently than it does today. If a museum wanted to be financially successful in the 1980s, they needed to cultivate support from local politicians who would then represent their needs to the entire General Assembly. McCrea observed that Assembly members often voted for history projects and funding, as well as other similar

¹⁹⁰ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

¹⁹¹ Bill McCrea, “Bill McCrea, Tryon Palace,” Interview by Museums are Here blog, June 24, 2021, <https://museumsarehere.com/2021/06/interview-with-bill-mccrea-tryon-palace/>.

¹⁹² William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

initiatives, on a quid pro quo basis regardless of their political affiliation. For example, if a Republican politician from Charlotte supported the funding initiative of a Democratic politician in Raleigh, then at some point in the future the Raleigh politician would repay the favor. While current museum employees still work hard to build relationships with state officials, McCrea said that in today's climate political polarization often keeps politicians from developing mutually beneficial relationships across party lines. This ultimately impedes initiatives to improve funding at history museums and historic sites.¹⁹³ After working a plethora of jobs for the NCDCCR, including serving as the Associate Director of the North Carolina Museum of History and Director of Regional Museums from 1999 to 2018, McCrea arrived at Tryon Palace in 2019. The Palace's history goes back to the eighteenth century, but the majority of the findings in this case study pertain to the museum's funding decline during the twenty-first century.¹⁹⁴

During his reign as the Royal Governor, William Tryon observed that there was a great need for a central government house in North Carolina's capital city of New Bern. He took these concerns to the state legislature, who approved levying taxes on the colony's residents, most of whom were poor farmers, to finance the construction of such a building. Construction lasted from 1767 to 1770 and cost taxpayers a then colossal sum of £15,000.¹⁹⁵ When complete, the Governor's Palace, now known as Tryon Palace, was one of the largest and most expensive houses in the American colonies.¹⁹⁶ Many North Carolinians at the time perceived the governor's expenditures as grossly excessive, which only added to the commonfolk's growing discontent

¹⁹³ William "Bill" McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

¹⁹⁴ Bill McCrea, "Bill McCrea, Tryon Palace," Interview by Museums are Here.

¹⁹⁵ "Palace History," Tryon Palace, accessed March 22, 2023, <https://www.tryonpalace.org/the-palace-historic-homes/tryon-palace/palace-history>; "The Cost of Tryon Palace," Anchor: A North Carolina History Online Resource, NCpedia, January 3, 2018, <https://www.ncpedia.org/anchor/cost-tryon-palace#:~:text=The%20cost%20of%20the%20building,to%20celebrate%20the%20project's%20completion.>

¹⁹⁶ David T. McCoy, "North Carolina, Financial Highlights Fiscal Year End June 30, 2010," North Carolina Office of the State Controller, 2, December 17, 2010, https://files.nc.gov/ncosc/June_30_2010_Popular_Report.pdf.

over oppressive taxation. Those sentiments helped to fuel the Regulator Movement, a rebellion against corrupt government in North Carolina that some historians view as the beginning of the American Revolution. In 1775, when the Revolution began in earnest, Governor Josiah Martin was forced to flee after patriot troops seized the residence. During the postwar era, Tryon Palace became the first meeting place for North Carolina's General Assembly and the home of the state's first four governors.¹⁹⁷

In the winter of 1798 disaster struck Tryon Palace when a fire erupted in the house's cellar and devastated the palace proper, leaving behind only the kitchen and stable offices. Over the next 130 years development claimed almost all the palace's structures, land, and gardens as New Bern grew with the rest of the county. By the twentieth century the stable offices, which were then being used as apartments, were the only remaining structure left from the original palace complex.¹⁹⁸ This changed in the 1930s when a movement to restore New Bern's colonial monuments and preserve its existing history gained traction across the state. Supporters of the movement eventually located the palace's original blueprints, which prompted New Bern native Maude Moore Latham to ask the General Assembly to subsidize the cost of restorations with public dollars. In 1945, the General Assembly established the Tryon Palace Commission, a twenty-five-person committee tasked with organizing the reconstruction of Tryon Palace on its original grounds. In addition, the state also agreed to take charge of the site once it was complete. For fourteen years the Commission worked to rebuild and restore Tryon Palace. Finally, in 1959, the museum and historic site opened to the public and has remained a state-owned entity ever since. Currently, the site sits on twenty acres and encompasses thirty-nine structures as well as

¹⁹⁷ "Palace History," Tryon Palace.

¹⁹⁸ "Palace History," Tryon Palace; "Stable Office," Tryon Palace, accessed March 22, 2023, <https://www.tryonpalace.org/the-palace-historic-homes/palace-grounds/stable-office>.

several gardens. In 2010, the site opened the North Carolina History Center, a second museum in addition to the Palace reconstruction. This second, larger museum is 50,000 square feet and hosts multiple exhibit galleries, offices, and meeting rooms as well as a gift shop, cafe, and theater.¹⁹⁹

Tryon Palace's funding stems from three main sources listed from most to least lucrative: appropriations from the state budget, private funds, and earned income. Like all state-owned museums, the majority of Tryon Palace's appropriations recur yearly, meaning that the site gets a set amount of public dollars every fiscal year. In addition, Tryon Palace also occasionally receives non-recurring funds, or one-time funds. These funds are a less prominent part of their public revenue because the General Assembly typically only approves non-recurring funds for specific needs, special projects, or emergency assistance. The site's private funds include revenue from their associated nonprofit organization, the Tryon Palace Foundation, individual and corporate donations, fundraisers, and membership dues. McCrea said the site benefits from its many longtime and generous private donors and members. Some private donors give earmarked funds, in which they specify exactly how they want their money to be used, while others give unrestricted funds, where the museum decides how to spend the money. According to McCrea, private funding has been strong for Tryon Palace for a long time, but "has accelerated over the past ten to twelve years as it has become clear that we need non-state support."²⁰⁰ Earned income is the smallest part of Tryon Palace's funding and comes from a diverse array of commercial offerings, including ticket sales, venue rentals, weddings, educational programming, and sales from the gift shop and cafe.²⁰¹

¹⁹⁹ "Palace History," Tryon Palace; William "Bill" McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²⁰⁰ William "Bill" McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²⁰¹ William "Bill" McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023; Single day tickets at Tryon palace cost \$20 for adults, \$10 for children ages six to fourteen, and \$0 for children five

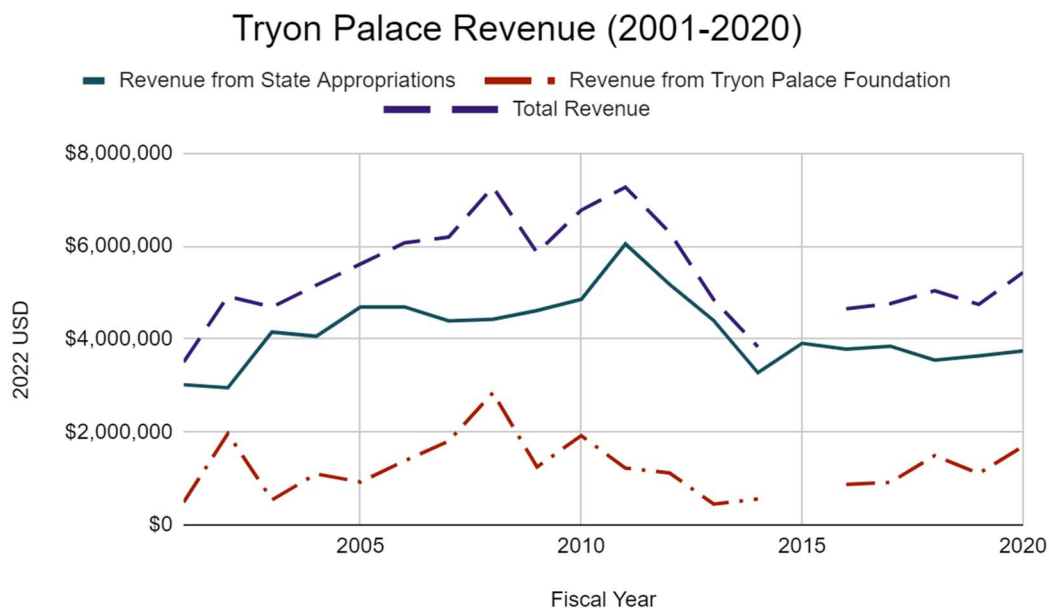


FIGURE 8: Tryon Palace Revenue (2001-2020). This figure denotes yearly total revenue in inflation adjusted 2022 USD.²⁰²

and under. The price of the site's tickets has stayed the same since at least 2011. See George Olson, "Tryon Palace Officials Worry Senate Budget Could Bring Shut-Down," *Public Radio for Eastern North Carolina*, May 27, 2011, <https://www.publicradioeast.org/pre-news/2011-05-27/tryon-palace-officials-worry-senate-budget-could-bring-shut-down>; "Tickets and Tours," Tryon Palace, accessed March 22, 2023, <https://www.tryonpalace.org/plan-your-visit/tickets>.

²⁰² For the data set from figure 8, see Appendix I and well as the following sources: "Tryon Palace Foundation INC: Tax Filings by Year," Nonprofit Explorer, ProPublica, last modified October 4, 2021, <https://projects.propublica.org/nonprofits/organizations/561795949>; See the bibliography for the full citations of the OAH's *Biennial Reports* (2000-2018); For state appropriations data from FYs 2018-2020, see "NC Budget and Spending: FY 2018, NCDCCR, Budget, General Fund, Budget and Spending Table," Open Budget, NC Reports, accessed April 19, 2023, https://ncreports.ondemand.sas.com/SASVisualAnalytics/?reportUri=/reports/reports/b00debfc-51e7-45a6-92d4-3efaf33a3daa§ionIndex=0&sso_guest=true&reportViewOnly=true&sas-welcome=false; "NC Budget and Spending: FY 2019, NCDCCR, Budget, General Fund, Budget and Spending Table," Open Budget, NC Reports, accessed April 19, 2023, https://ncreports.ondemand.sas.com/SASVisualAnalytics/?reportUri=/reports/reports/b00debfc-51e7-45a6-92d4-3efaf33a3daa§ionIndex=0&sso_guest=true&reportViewOnly=true&sas-welcome=false; "NC Budget and Spending: FY 2020, NCDCCR, Budget, General Fund, Budget and Spending Table," Open Budget, NC Reports, accessed April 19, 2023, https://ncreports.ondemand.sas.com/SASVisualAnalytics/?reportUri=/reports/reports/b00debfc-51e7-45a6-92d4-3efaf33a3daa§ionIndex=0&sso_guest=true&reportViewOnly=true&sas-welcome=false.

This figure *does not* include any revenue from earned income because there is no consistent data on that source of funding going back to 2001 (see figures 8 and 10). The gap in nonprofit revenue and total revenue exists because data on Tryon Palace for FY 2015 is not available on ProPublica.

During the first decade of the twenty-first century the site's total revenue increased steadily, except during years when the state experienced significant economic turmoil. The decrease in total revenue in FY 2003 stemmed from the early 2000s Recession, which caused "a serious and continuing budget crisis," for the OAH.²⁰³ Similarly, the losses in total revenue in FY 2009 were largely caused by the Great Recession, which Jeffrey J. Crow described as the state's "most challenging financial situation since the Great Depression."²⁰⁴ While state appropriations during the FYs 2003 and 2008 increased, revenue from the Tryon Palace Foundation declined significantly which resulted in a sharp drop in the site's total revenue. In both cases the site regained and even exceeded previous levels of revenue intake once the state's economy improved. However, during the second decade of the twenty-first century Tryon Palace's total revenue declined steeply and remained well below where it was during the first decade. In FY 2011, the site received peak appropriations at approximately \$6 million dollars (2022 USD), but just three years later, in FY 2014, appropriations plummeted to a decade low of \$3.27 million dollars (2022 USD). From FYs 2015 to 2020, funding increased marginally to an average of \$3.74 million dollars (2022 USD). However, even after the site's total revenue stabilized it remained an average of 38% lower than it was in FY 2011 (see figure 8).

McCrea said that the rapid decline in funding stemmed from budget cuts that the General Assembly approved after the 2010 election. He explained that "when there was a change in the General Assembly's leadership between 2010 and 2012, a number of history museums had substantial cuts in their funding, most of which, from my perspective, appeared to be politically

²⁰³ Kay P. Williams, "Division of State Historic Sites and Properties," in North Carolina Office of Archives and History, *Fiftieth Biennial Report of the North Carolina Office of Archives and History*, 2004, 41, <https://digital.ncdcr.gov/digital/collection/p249901coll22/id/25794/rec/42>.

²⁰⁴ Jeffrey J. Crow, "Deputy Secretary's Report," in North Carolina Office of Archives and History, *Fifty-Third Biennial Report of the North Carolina Office of Archives and History*, 2010, 1, <https://digital.ncdcr.gov/digital/collection/p16062coll9/id/541809>.

based.” In McCrea’s opinion these changes were part of a fight over “political territory” where “a new Republican General Assembly [began] cutting projects that had been endorsed by Democrats in the past.” Though McCrea said that “it’s very unfair to classify the current and past Republican majority as anti-history,” he allowed that when politicians disagree with contemporary interpretations of history, namely those that take a social history perspective or include diversity measures, they are more likely to vote against funding for history museums.²⁰⁵ According to McCrea, from 1959 to 2011 the state’s appropriations supported nearly all of the site’s operating costs, but since then state appropriations have only covered approximately 50% of expenses.²⁰⁶ To mitigate the lost appropriations, the site increased efforts to cultivate private funds and earned income (see figures 4 and 5).

²⁰⁵ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²⁰⁶ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023; Resource Dependency Theory states that “because firms are unable to reduce uncertainty and interdependence on the larger social system (including the government), they undertake other means to reduce the uncertainty and interdependence from these environmental contingencies.” In the context of Tryon Palace, the site formed a dependence on state appropriations and an interdependence on the State Government. When that source of funding became unreliable, the site moved on to alternative forms of funding, see Amy J. Hillman, Michael C. Withers and Brian J. Collins, “Resource Dependence Theory: A Review,” *Journal of Management* 35, no. 6 (2009): 1411.

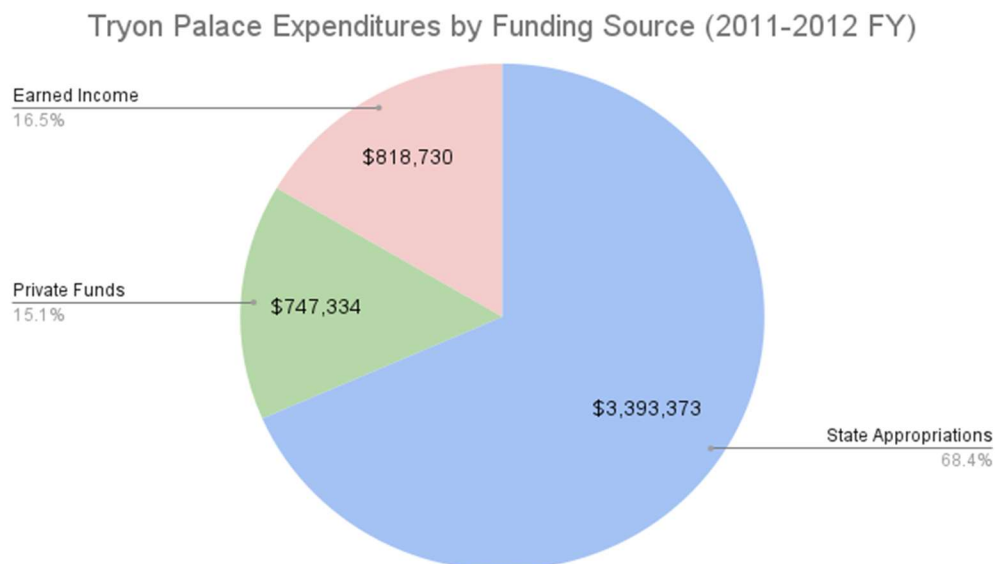


FIGURE 9: Tryon Palace Expenditures by Funding Source (FY 2011-2012). This figure denotes expenditures by source during FY 2011-2012. This figure *does not* denote revenue.²⁰⁷

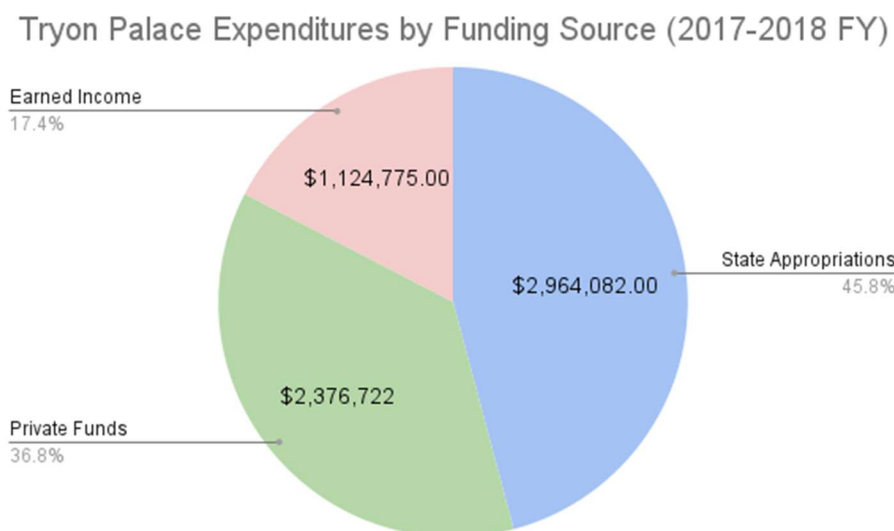


FIGURE 10: Tryon Palace Expenditures by Funding Source (FY 2017-2018). This figure denotes expenditures by source during FY 2017-2018. This figure *does not* denote revenue.²⁰⁸

²⁰⁷ The data from figure 9 was provided by Lindy Cummings (Tryon Palace research historian), "Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2011 through June 2012," From the Tryon Palace Accounting Department, email to author, March 13, 2023.

²⁰⁸ For the data from figure 10, see Tryon Palace, "Tryon Palace: 2019 Annual Report," 2020, 15, https://www.tryonpalacefoundation.org/wp-content/uploads/2021/01/2019_Annual_Report_booklet.pdf.

The shift from public to private models of funding is one that McCrea said he has witnessed across the United States, “nation-wide, and North Carolina is included in that, there is an emphasis or desire to see more of a public-private partnership [at museums].” At Tryon Palace, increased reliance on private funds has produced a plethora of adverse side effects. McCrea stated that since the museum was forced to diversify its streams of revenue, he has noticed that Tryon Palace “need[s] to do a lot more to raise funds.” Now the museum devotes far more effort to procure funds from individual donors, corporations, granting institutions, members, and fundraising activities. Much like Saperstein, McCrea noted that competition for funding between museums and other cultural institutions has ramped up in recent years. “In a community like New Bern,” stated McCrea, “there are only so many companies that you can approach, and they also are being approached by everyone else.” Grants are also one of the private funding sources that Tryon Palace readily pursues, but much like state appropriations grant money can come with “an awful lot of strings attached.” In fact, it is not unprecedented for private funders of all types to create certain stipulations that museums must meet to receive donations or grants. Funders frequently request reports of what is being done with their money, which requires extra time and resources to create.²⁰⁹ McCrea’s statements indicate that deficits in traditional sources of funding from yearly appropriations have resulted in the museum having to rely on less stable sources of income as well as increased competition between organizations and workload for the museum’s staff.

²⁰⁹ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

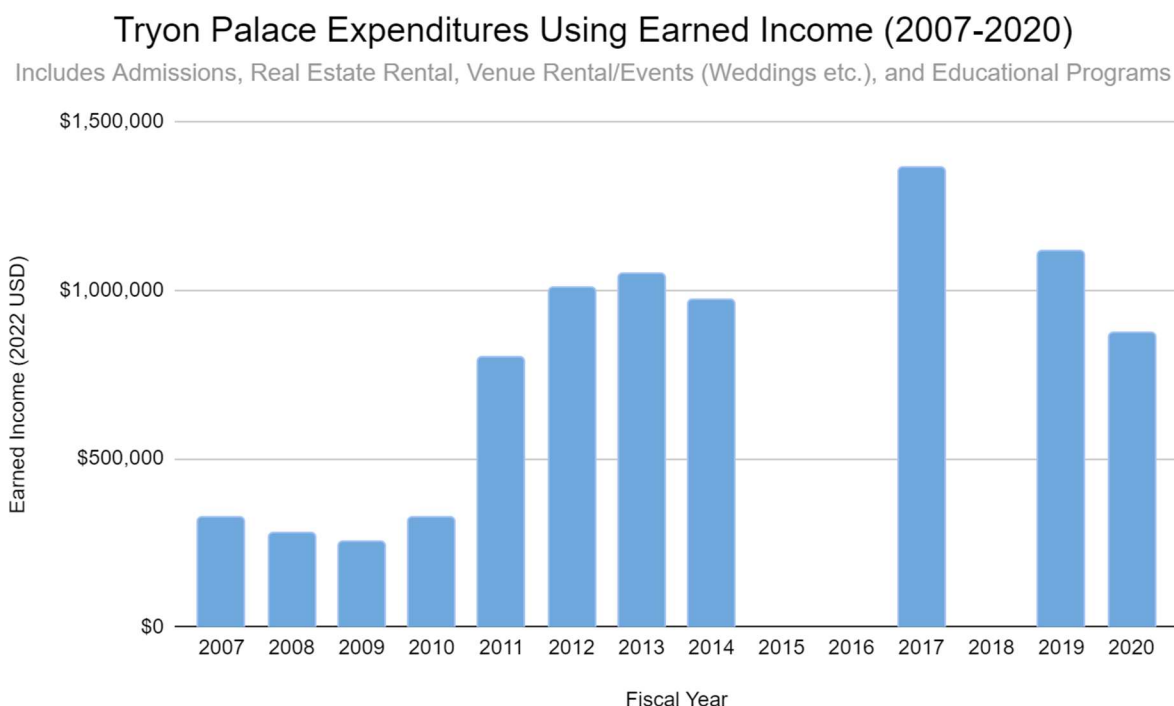


FIGURE 11: Tryon Palace Expenditures Using Earned Income (2007-2020). This figure denotes expenditures from earned income in 2022 USD. This figure *does not* denote revenue from earned income.²¹⁰

²¹⁰ The data set for figure 11, see Appendix J. The data set was provided by Lindy Cummings (Tryon Palace research historian), “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2007 through June, 2008,” “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2008 through June, 2009,” “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2009 through June, 2010,” “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2010 through June, 2011,” and “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2011 through June, 2012,” from the Tryon Palace Accounting Department, email to author, March 13, 2023; For the data from 2012-2020, see Tryon Palace, “Tryon Palace: 2013 Annual Report,” 2014, 7, https://www.tryonpalacefoundation.org/wp-content/uploads/2021/01/2019_Annual_Report_booklet.pdf; Tryon Palace, “Tryon Palace: 2014 Annual Report,” 2015, 6, https://www.tryonpalace.org/wp-content/uploads/2021/06/tryonannualreport2014_web.pdf; Tryon Palace, “Tryon Palace: 2015 Annual Report,” 2016, 6, https://www.tryonpalace.org/wp-content/uploads/2021/06/tp_annualreport2015_lowres.pdf; Tryon Palace, “Tryon Palace: 2018-2019 Annual Report,” 2020, 15, https://www.tryonpalacefoundation.org/wp-content/uploads/2021/01/2019_Annual_Report_booklet.pdf; Tryon Palace, “Tryon Palace: 2020 Annual Report,” 2021, 15, https://www.tryonpalacefoundation.org/wp-content/uploads/2021/05/2020_Annual_Report_booklet-1.pdf; Tryon Palace, “Tryon Palace: 2021 Annual Report,” 2022, 17, https://www.tryonpalacefoundation.org/wp-content/uploads/2022/12/2021_Annual_Report_booklet-updated-12.16.22_.pdf. The gaps in data for FYs 2015, 2016, and 2018 exist because Tryon Palace either did not create or did not publish an “Annual Report” for the corresponding calendar years.

In addition to increased reliance on private funds, another significant change is that Tryon Palace now directs more effort and resources towards the cultivation of earned income from auxiliary services, especially venue rentals. McCrea said that former executive director Kay Williams (1983 to 2012) was “not supportive” of renting the site’s buildings and grounds for weddings and wedding receptions.²¹¹ However, when yearly appropriations began to dwindle after FY 2011, rental services became a way to replace lost revenue. Though McCrea acknowledged their necessity, he also admitted that rental services come along with considerable side effects. For example, when the preparation for an event occurs during the site’s standard hours of operation it can diminish the visitor experience for the museum’s regular attendees. In addition, when events use trucks and other equipment for the setup process it can cause excessive wear and tear on the buildings and grounds. Despite this, McCrea maintained that the positive outcomes from rental services work to counteract their negative side effects. Rental services are not only lucrative; they also act as an advertisement for the museum. McCrea revealed that when guests come for weddings, events, and corporate meetings the museum gets the opportunity to expose “who we are and what we do to a larger audience who may or may not be [typical] museum visitors.”²¹² Tryon Palace now offers a plethora of rental services for weddings, events, meetings, and more at sites across their campus. In fact, venue rentals for weddings and other large gatherings are so popular that the site maintains a formal partnership with two local wedding and event planning firms in New Bern.²¹³

²¹¹ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²¹² William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²¹³ “Your Wedding at Tryon Palace...” Tryon Palace, accessed March 22, 2023, <https://www.tryonpalace.org/hosted-events/weddings>.

Aside from the site's newfound reliance on private funds and earned income, shifts in models of funding also severely affected Tryon Palace's staff size and composition. In 2010, the North Carolina History Center opened after two decades of planning. In order to realize this momentous feat, the museum organized a successful \$60.6 million dollar capital campaign—\$42.7 million of which came from the state, while “\$1.5 million [came] from the City of New Bern, and \$1.3 million [came] from Craven County, with the remainder from individuals, federal grants, foundations, and corporations.”²¹⁴ To accommodate for the expansion, the site's management planned to add thirty-eight new positions to their staff for a total of ninety-five employees. However, by 2012, budget cuts required that the museum eliminate thirty-three positions, which left the staff size roughly the same as it was before the new museum opened.²¹⁵

To mitigate the increased workload and loss of positions, the site's leadership reconfigured the work structure of the museum. One of the most significant consequences was that management was forced to lay off the entire exhibit and curatorial team, whose responsibilities were then delegated to the collections team on top of their previous workload. In the thirteen years since the History Center opened, the museum has still not returned to regular operations. In fact, the museum never recovered the full extent of the staff positions they lost in 2012. The result is that some programs and content the museum used to offer, such as certain live historic interpretation displays, have since disappeared. Furthermore, McCrea said that the workload continues to be burdensome even more than a decade later, “I think it's fair to say that

²¹⁴ Kay Williams and Philippe Lafargue, “Tryon Palace,” in North Carolina Office of Archives and History, *Fifty-Third Biennial Report of the North Carolina Office of Archives and History*, 2011, 18, <https://digital.ncdcr.gov/digital/collection/p16062coll9/id/541809>.

²¹⁵ Kay P. Williams, “Deputy Secretary's Report,” in North Carolina Office of Archives and History, *Fifty-Fourth Biennial Report of the North Carolina Office of Archives and History*, 2013, 9, <https://digital.ncdcr.gov/digital/collection/p16062coll9/id/541939>.

just about every employee is doing the work that two employees had done previously.”²¹⁶

Nevertheless, McCrea maintained that the quality of content that the site produces is still on par with what it was in 2010.

Another effect that the General Assembly’s budget cuts had on Tryon Palace’s staff is that the site had to challenge long standing precedents that mandate how museums and historic sites can use ticket sale revenue. Chapter 121, section 7.7 of the North Carolina General Statutes declares that state-owned museums and historic sites must deposit all revenue from ticket sales into a special funds account and that those monies may only be used for “operation, interpretation, maintenance, preservation, development, and expansion.”²¹⁷ Though it is not stated explicitly in the statutes, McCrea disclosed that special funds money was never intended to be used to pay the salaries of any staff member in a permanent, full time position. McCrea said that before 2012 Tryon Palace often used their special fund for maintenance and repair costs. However, after the budget cuts were introduced the Tryon Palace Commission had to reorient special funds money to be able to make payroll for their maintenance staff. Currently, twelve of the site’s maintenance staff are paid using money from the special fund.²¹⁸ This means that the special fund is stretched thinner, and that that money may not be available for its more traditional uses. These effects indicate that staff size, staff composition, and workload at Tryon Palace were subjected to negative changes when state appropriations decreased. Moreover, these negative effects have persisted even though the revenue the museum can generate from private funds and

²¹⁶ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²¹⁷ The General Assembly of North Carolina, *Chapter 121, Archives and History, Article 1, General Provisions*, last modified 2020, https://www.ncleg.net/enactedlegislation/statutes/html/bychapter/chapter_121.html.

²¹⁸ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

earned income do not provide the same amount of financial support or stability as state appropriations.

McCrea said that one of the reasons that Tryon Palace's funding has remained consistently lower than it was during and before 2011 is because the General Assembly is now more reluctant to increase existing yearly appropriations and approve the creation of new recurring funding. In addition, he stated that this trend has affected what type of funds museums can garner from the State Government. "The General Assembly has historically been more comfortable funding one-time money," said McCrea, "than to fund, say, staff positions because staff positions are recurring."²¹⁹ In recent years, Tryon Palace has been able to secure one-time funding, or non-recurring appropriations, for specific purposes, such as for repairs to the site's grounds and buildings. However, the non-recurring funds they have received do not compensate for the monetary losses that the site sustained after 2011, nor were they ever meant to. The General Assembly's newfound preference for non-recurring funds is just one of the ways that they have limited their financial responsibilities to history museums during the neoliberal era. This is not to say that the State Government does not ever support new or increased recurring funding but, as McCrea's testimony indicates, this type of funding has become much harder to procure over the last decade. The result is that museums not only receive less money from state appropriations, but that museum staff in North Carolina must also work harder than ever to convince the General Assembly that history museums are worth the public dollars that they receive.

²¹⁹ William "Bill" McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

In addition to funding issues and shifts on the state level, McCrea has also noticed that national politics have begun to affect the funding and content at history museums. McCrea stated that prior to the two most recent Presidential Elections in 2016 and 2020, he had not noticed any significant changes in museum funding after a national election. However, in recent years he has observed indicators that national politics now affect history museums more readily. He points to increased political polarization and the ongoing debate between conservative and liberal politicians on whether the government should regulate historical narratives on social issues, such as racism and sexism, in public education as evidence for his claims.²²⁰ However, disagreements between conservative and liberal groups over historical narratives are not at all recent. As seen from the controversy over the National History Standards program in 1994 (see “History for Sale”), this debate is part of a larger social and political conflict known as the “Culture Wars,” which has been going on since at least the 1990s.²²¹

Nevertheless, McCrea argued that “if you disagree with the way history is being told, researched, and interpreted in the current day,” which is more likely to incorporate a variety of minoritized voices, then you may be against funding for history museums. He went on to add that the content and programming that history museums now offer is very different than it was when he began his career in 1981. Narratives about Black people, Native American people, and women are now much more prominent among contemporary historians. It is because of these paradigm shifts that many history museums have diverted away from the “simple, declarative, and linear narrative[s]” that they used to espouse, though some conservative politicians would

²²⁰ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²²¹ Laura Ansley, “‘The Culture Wars—They’re Back!’ Divisive Concepts, Critical Race Theory, and More in 2021,” *Perspectives on History*, August 11, 2021, <https://www.historians.org/research-and-publications/perspectives-on-history/september-2021/the-culture-wars%E2%80%94theyre-back-divisive-concepts-critical-race-theory-and-more-in-2021>; William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

like to see them make a comeback. McCrea asserted that Tryon Palace has strayed far away from the “great white fathers” narrative that was so popular in decades past, despite that this may affront politicians who cling to outdated historical interpretations.²²²

Despite ongoing difficulties with funding on the national and state levels, the appropriations that state-owned museums receive from the General Assembly are still one of the biggest benefits that they have over nonprofit museums. McCrea stated that recurring appropriations give Tryon Palace financial stability and security because, barring any major overhauls to current state policies, the site can rely on those funds year to year. McCrea described state-owned museums as having the “best of both worlds” because they possess the “underlying structure of the state’s support” in addition to nonprofit proceeds. The duality of the state-owned funding system gives state-owned museums an advantage over nonprofit museums. Though museums in the state-funded system are subject to the vagaries of the General Assembly and the political ideologies that lawmakers espouse, they still have guaranteed funds each year, which is a luxury that most nonprofit museums do not have access to. Furthermore, even though state-owned museums have seen huge drops in revenue since 2010, they still generate more total revenue than most nonprofit museums (see figures 3 and 5b). In comparison to nonprofits, state-owned museums benefit from higher budgets, more competitive salaries, and better employee benefits. Perhaps most importantly, state-owned museums have more resources and manpower at their disposal, which affords them the time and ability to seek out alternate sources of funding when traditional sources fail.²²³

²²² William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

²²³ McCrea said that being an agent of the state is “particularly [helpful] when you're recruiting employees.” Though staff at history museums are often attracted to higher paying salaries in private industries, McCrea stated that the benefits at state-owned museums, such as state employee’s health insurance, entice those who choose to stay in the field, William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023.

MUNICIPAL MUSEUMS: MUSEUM ENTERTAINMENT INC. INCOMING

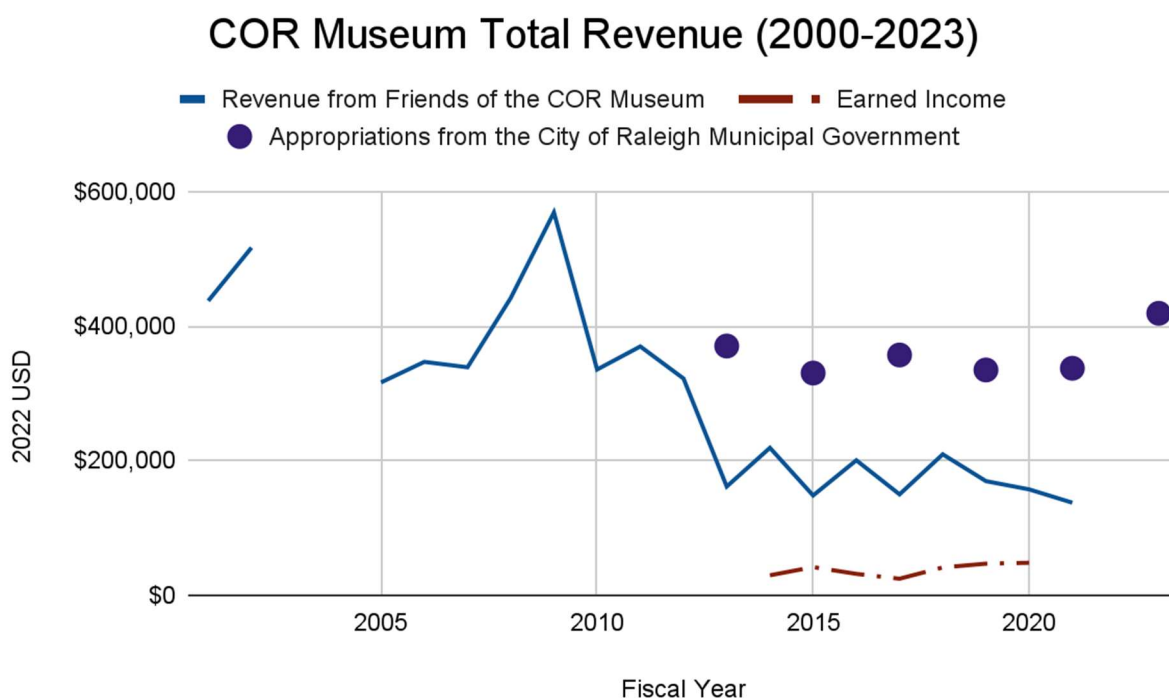
One year after the Chapel Hill Museum closed its doors forever, an eerily similar financial crisis occurred just thirty miles away at the Raleigh City Museum. Like many history museums in the state, the Raleigh City Museum began as a nonprofit born out of local historian Beth Crabtree's dream to establish a historical repository for North Carolina's capital city. After the city's bicentennial anniversary in 1992, community support bolstered a movement to establish a museum focused on Raleigh's history.²²⁴ In 1995, the museum and two other nonprofit organizations purchased the historic 1874 Briggs Hardware Building in downtown Raleigh and, in 1998, the museum opened its first permanent exhibits to the public. "The Raleigh City Museum was... always in and out of financial problems throughout their tenure here," said Ernest Dollar, the museum's current executive director.²²⁵ Much like the Chapel Hill Museum, the Great Recession exacerbated the Raleigh City Museum's preexisting financial problems, but their struggles with money came to a head in 2011 when the museum's HVAC system required costly repairs. The museum's leadership soon came to the grim realization that they could not afford to pay those bills and also maintain an operating budget. A permanent shutdown seemed imminent until the leaders of the museum approached the City of Raleigh Municipal Government, who, unlike Chapel Hill's Town Council, agreed to purchase the museum and assume control of its operations.

In 2012, the Raleigh City Museum became the City of Raleigh Museum (COR Museum), a city-owned, operated, and funded organization. However, the museum's previous leaders did

²²⁴ "The City of Raleigh Museum," COR Museum, accessed March 22, 2023, <https://www.cityofraleighmuseum.org/>; Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²²⁵ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

not disappear completely. The former board of directors became a part of the new board for the Friends of the COR Museum, a nonprofit fundraising organization. Before Dollar joined the COR Museum, he first worked at two nearby nonprofit history organizations. He began his public history career in 2001 with the Orange County Historical Museum of Hillsborough, but he soon left that position in 2004 to pursue a master's degree in public history from North Carolina State University. While there he worked at several historic sites in Charleston, South Carolina as well as some in North Carolina. After graduation, Dollar went on to become the executive director of the Preservation Society of Chapel Hill, until he left that position to join the COR Museum in 2012. Now Dollar works within Raleigh's Parks, Recreation, and Cultural Resources Department and oversees both the COR Museum and its subsidiary, the Pope House Museum.²²⁶



²²⁶ The Pope House Museum is the former residence of Manassas Pope, who was one of the first licensed Black doctors in North Carolina. Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

FIGURE 12: COR Museum Total Revenue (2000-2023). This figure denotes yearly total revenue in inflation adjusted 2022 USD, except for FY 2023.²²⁷

COR Museum Earned Income FYs 2014-2020

Table 3: COR Museum Earned Income FYs 2014-2020.²²⁸

	FY13-14	FY 14-15	FY15-16	FY16-17	FY 17-18	FY 18-19	FY 19-20
Rental Revenue	\$14,795	\$21,120	\$13,400	\$7,945	\$18,410	\$22,350	\$32,846
Gift Shop Revenue	\$9,091	\$9,291	\$9,631	\$9,403	\$10,649.84	\$9,933	\$6,531.87
Donations		\$333	\$563	\$180	\$310.18	\$3,825.10	\$701
Donation Box		\$3,005	\$2,245	\$2,823	\$3,535.48	\$4,100	\$2,159.62
Tours					\$1,340	\$790	0
Total	\$23,886	\$33,749	\$25,839	\$20,351	\$35,204	\$40,698.10	\$42,238.50

The COR Museum draws most of its revenue from the city’s yearly appropriations, but it also receives private funds, mostly from the Friends of the COR Museum, as well as earned income. Out of the seven museums whose staff consented to the questionnaire in “History for Sale,” Dollar was one of only two respondents who indicated that their museum does not struggle with underfunding; the second being the only other municipal museum to participate in the study.²²⁹ However, as Dollar indicated in the interview, the museum’s finances were not

²²⁷ For the data set from figure 12, see Appendix K as well as the following sources: “Friends of the City of Raleigh Museum: Tax Filings by Year,” Nonprofit Explorer, ProPublica, last modified January 10, 2022, <https://projects.propublica.org/nonprofits/organizations/582069400>; The data on municipal appropriations was provided by Ernest Dollar (executive director of the COR Museum), “FY 2023 Budget Document,” email to author, April 13, 2023 and “Budget Document FYs 2013, 2015, 2019, and 2021,” and “Earned Income Graph FYs 2014-2020,” email to author, April 20, 2023. The gap in nonprofit revenue exists because data from the Friends of the COR Museum for FYs 2003 and 2004 is not available on ProPublica.

²²⁸ The data set for table 3 was provided by Ernest Dollar (executive director of the COR Museum), “Earned Income Graph FYs 2014-2020,” email to author, April 20, 2023.

²²⁹ Ernest Dollar: Interviewee #7 (Executive Director: Municipal Museum), Questionnaire Response to Shelby Dains, November 15, 2022; Anonymous Interviewee #8 (Executive Director: Municipal Museum), Questionnaire Response to Shelby Dains, November 15, 2022.

always so stable. Before the city assumed ownership of the museum in 2012, the museum's revenue exhibited similar trends to many other nonprofit museums in North Carolina. Nonprofit revenue from the Friends of the COR Museum rose to a high in FY 2009, at \$568,675.31 (2022 USD), but then shrank to \$161,546.75 (2022 USD) by FY 2013 (see figure 12). However, since then the city's appropriations have moved in to replace deficits in nonprofit earnings.

Unlike many other museums in the state, the COR Museum's total revenue has increased in recent years. Between FYs 2015 to 2019, average total revenue at the museum amounted to \$567,540.76 (2022 USD), which is almost equal to nonprofit revenue in FY 2009 and significantly higher than nonprofit revenue before and after that peak year. In fact, appropriations revenue from FY 2023 reached a record high at \$418,876.06 (see figure 12). Though the museum's total revenue for FY 2023 is not yet available, it is probable that with the combined earnings from appropriations, private funds, and earned income, FY 2023 will be the museum's most lucrative year to date. In addition to the revenue displayed in figure 12, Dollar disclosed that in 2012 the City Council also put aside \$500,000 for the museum in a grant matching program with the expectation that the Friends of the COR Museum would raise an equal amount through fundraising. This strategy sought to give the museum a one million dollar starting point to build a "first class exhibit to tell the history of the city," though the nonprofit has only managed to raise around \$150,000 to date.²³⁰ Evidence from figure 12 and Dollar's own testimony indicates that after the museum adopted the municipal system their previous problems with underfunding disappeared almost entirely.

²³⁰ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

When asked what factors contribute to the COR Museum's financial success, Dollar replied that it is directly correlated with the fact that "the city has shown through its funding that it does have a desire and a care for the historical education and the cultural enrichment of its constituency."²³¹ In 2016, when Raleigh's city government developed their "Strategic Plan" on how to better serve their constituents, they used public meetings and surveys to deduce that culture and history were something that the local community valued.²³² In response, the city redirected their budget to invest in repositories of history and culture, such as the COR Museum. In addition, the museum is located in the state capital and the Research Triangle, both of which benefit the organization through sustained academic interest.²³³ Raleigh also possesses a large population base, an affluent—and highly taxable—community, and a local government that supports raising tax rates, all of which work together to provide the city, and thereby the museum, with substantial public dollars. Dollar said that the COR Museum is exceptionally fortunate to be "in a community that can support the museum and other cultural resources." He revealed that the museum's working relationship with Raleigh's city government is much different than many other municipalities in the state, where local governments either do not have expendable income or they do not see the value in providing monetary support to history museums.²³⁴

Dollar relayed that after the museum gained the city's full support in 2012, the museum's funding, content, and programming underwent substantial transformations. Some of these

²³¹ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²³² "Strategic Plan," City of Raleigh, accessed April 20, 2023, <https://raleighnc.gov/government/strategic-plan>.

²³³ The Research Triangle is a name for the area of the piedmont where three of North Carolina's most prominent research Universities exist in relative proximity to one another. Those Universities are North Carolina State University in Raleigh, Duke University in Durham, and the University of North Carolina at Chapel Hill in Chapel Hill.

²³⁴ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

changes occurred immediately upon transitioning from the nonprofit to the municipal system of funding. According to Dollar, the city's appropriations provided never-before-seen financial stability, which afforded the museum some much needed facility repairs and upgraded exhibit equipment. The museum was also able to create new staff positions and hire more highly trained professionals, which resulted in a more even distribution of the workload as well as improved content and programming. Other changes, especially among the museum's private funders, developed more subtly. "I think the old museum really worked with the community because they needed the donations," Dollar reported, "so they would do a lot of vanity exhibits on the big families in town." After the museum added measures to ensure that their content became more democratic, Dollar noticed a shift in funder demographics. He stated that some of the "old Raleigh families," or local families with wealth and power, cut back their support for the museum while a new and more diverse cohort of donors moved in to take their place. Similarly, the museum's funders also shifted when they began to produce more histories centered on people of color and women, "I do a lot of diversity programming, and we have lost and gained people because of that."²³⁵ Others stopped giving once the city took over because they interpreted the change as meaning that the museum no longer needed their support (see figure 12).²³⁶

Dollar contended that one of the reasons that the city continues to fund the COR Museum is because the museum uses its content and programming to emphasize how the past shapes the present. Furthermore, he argued that doing so is a way to show funders that protecting the financial health of history museums also fosters critical thought, cultural understanding, and historical knowledge within the community. He provided Raleigh's growing gentrification crisis

²³⁵ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²³⁶ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

and the local civil rights movement as examples of past events that continue to shape present-day life in the city. The COR Museum features displays on both topics that track “the entire trajectory of how we got to this point by looking at the past and all these injustices.” When the Black Lives Matter grassroots movement took the United States by storm during the summer of 2020, the COR Museum asked the city government to allow them to create programming that would help the community better understand the nation’s history of racism. To do this, the museum created the ‘Historic Equity Tour,’ a free self-guided walking tour that explains the history of race in the South through seven Black history sites around the city. Dollar’s account of the museum’s initiatives to contextualize local history serves as a compelling testimony of what museums can accomplish when they have adequate funding.²³⁷

Though the museum has not experienced financial hardship since adopting the municipal system, this does not mean that they bear none of the effects of the neoliberal era. In fact, some symptoms of neoliberalism present just as prominently at the COR Museum as they do elsewhere. One effect that all three museums reported is that they must constantly exhibit their economic value to funders, both public and private, to be considered a worthy candidate for monetary support. For instance, Dollar stated that the COR Museum has a “symbiotic relationship” with the Greater Raleigh Convention and Visitors Bureau (GRCVB), which is a city and county operated marketing firm that promotes the museum, and other destinations in Wake County, as a tourist attraction.²³⁸ In order to capitalize on the GRCVB’s marketing campaigns— which work to brand Raleigh as the “Smithsonian of the South” for its many free

²³⁷ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²³⁸ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023; “Greater Raleigh Convention & Visitors Bureau,” City of Raleigh, accessed March 22, 2023, <https://raleighnc.gov/greater-raleigh-convention-visitors-bureau>.

and public museums—, the museum must show that their presence encourages visitors to travel to the city and spend money.²³⁹ This is similar to McCrea likening Tryon Palace to a “big business” which draws people to New Bern and Saperstein comparing the Wilmington Railroad Museum to other entertainment attractions in North Wilmington.²⁴⁰

The need for history museums to demonstrate their economic value leads to high rates of exhibit turnover and changes in museum content. Dollar stated that the COR Museum “constantly [tries] to have fresh and new exhibits, almost to our detriment... We are constantly doing as much programming as we can bear.” He described these efforts to increase visitation and cash flow as the museum doing its part to preserve the economic health of downtown Raleigh.²⁴¹ The description that Dollar provided is indicative of the shift that historian Stephen Weil identified in 1999, whereby museums went from merely advertising their content to attract visitors to actively marketing to the public’s demands. This shift resulted in external demand having a larger influence on the content at museums.²⁴² In many ways this is a positive occurrence, as museums are now more responsive to societal change and more inclined to represent a diverse array of histories. However, Dollar stated that the evolution of American culture has produced a public that increasingly expects tech-savvy and interactive content that is both entertaining and relatable. Although this type of content requires more time, money, and resources to create, parent organizations, funders, and audiences now expect museum staff to produce content at faster than ever rates. Dollar indicated that museums who do not have the

²³⁹ “Museums in Raleigh, N.C,” Things to Do, VisitRaleigh, accessed March 22, 2023, <https://www.visitraleigh.com/things-to-do/museums/>.

²⁴⁰ William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023; Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

²⁴¹ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²⁴² Weil, “From Being About Something to Being for Somebody: The Ongoing Transformation of the American Museum.”

funds or staff to engage in rapid content production and produce high-tech interactive exhibits are now more likely to seem uninteresting and uncreative to the public.²⁴³

In addition, museums in the neoliberal era may hesitate to introduce content on controversial or emotionally charged subjects, such as race, gender, sexuality, or war, due to concerns that guests may find this type of content unpleasant or even offensive. Dollar said that this is especially true for politically liberal communities such as Chapel Hill and Raleigh, where “looking back at the past is an embarrassing place.”²⁴⁴ Museums can serve as a reminder of the “dark parts of history” that certain or even entire communities find hard to reckon with. If history museums become known for consistently eliciting negative responses, perhaps more than they already are, it could ward off both visitors and funders.²⁴⁵ Dollar expressed worry that if museums are unable to satisfy the public's demands and quickly adapt to forthcoming societal changes that Americans will become undereducated in history and thus more susceptible to misinformation.²⁴⁶

When considering the growing financial, social, and political issues at history museums in North Carolina, Dollar stated that there could be a tumultuous future ahead for the museum industry. He predicted that museums who are underfunded may be compelled to promote disingenuous histories or avoid certain topics to comply with funders' requests. “The great double-edged sword of running a museum,” said Dollar, “is that you always need money and

²⁴³ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²⁴⁴ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²⁴⁵ For an example of how this has already happened in North Carolina, see Alicia Bayat, “Lost History or Dark Obsession,” a review of the ICRCM that stated that, “This wasn’t a museum that seemed to celebrate a culture more like a reflected only the darkness, the celebrity and the one-sided view-point of one perspective of historical time period,” *The Voice*, February 11, 2011, 8, <https://newspapers.digitalnc.org/lccn/2015236766/2011-02-23/ed-1/seq-16/#words=civil+Civil+International+museum+Museum+museums+Museums+right+rights+Rights>.

²⁴⁶ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

when someone comes with a handful of it [museums may feel inclined to accept those funds], but in return [the funders] want to have a space where they can use that money to talk about whatever they want.”²⁴⁷ While both directors from Tryon Palace and the COR Museum stated that their organizations have the wherewithal to turn down potentially manipulative funders, nonprofit museums and other underfunded institutions often do not have the same financial freedom.²⁴⁸ As Dollar explained, “it is a lot harder to turn down [money] when you are struggling to make payroll and someone shows up with a \$10,000 check.” At the end of the interview, Dollar expressed deep concern over shifting models of funding within the museum industry, “as the history field struggles to compete in the digital, online world... people with money will be able to start shaping [and] reshaping [historic] narrative[s] according to how powerful their pocketbooks are.”²⁴⁹

The evidence presented, both from qualitative and quantitative sources, indicates that the nonprofit system of funding is insufficient to support financial health and wellbeing at history museums in North Carolina. Furthermore, nonprofit museums exhibit more severe symptoms of underfunding than other types of museums. This is because their sources of funding tend to be less reliable than those at state-owned and municipal museums. The converse of this argument is that the municipal system is the most effective funding model. However, it must be stated that there is nothing inherently different between the state-owned and municipal systems. Both systems garner the majority of their funding from recurring government appropriations and

²⁴⁷ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²⁴⁸ It should be noted that in our interview, Saperstein never indicated that the Wilmington Railroad Museum struggles with these issues. This observation is one that Dollar made completely independently of the other interviewees. William “Bill” McCrea (executive director of Tryon Palace), interview with author, Zoom, January 24, 2023; Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²⁴⁹ Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

benefit from the nonprofit model. The reason that state-owned museums exhibit more symptoms of underfunding than municipal museums is because of the rate at which neoliberal ideology and neoliberal influenced policies have infiltrated the State Government. Though Raleigh's city government is certainly not uninfluenced by neoliberalism, they have continued to prioritize funding for the COR Museum so that the organization thrives in all capacities. The same cannot be said for the State Government, who have demonstrated continued support for neoliberal influenced policies to the detriment of North Carolina's history museums. Even so, the neoliberal era has left no history museum untouched; all museums bear the effects of neoliberal influenced policy that seeks to either defund the history museum into nonexistence or change the fundamental elements of the history museum until it is more akin to a profit producing entertainment center.

CONCLUSION: THE FUTURE OF THE HISTORY MUSEUM

Despite its persistent and detrimental effects, it is unlikely that the neoliberal era will come to an end anytime soon. This is evidenced by the fact that the societal impact of major private corporations, neoliberalism's main beneficiaries, has grown exponentially over the course of the twentieth and twenty-first centuries. Their influence has become particularly pervasive in government, where powerful special interest groups and super PACs use their seemingly unlimited resources to manipulate the legislative process to their advantage. Since the 1980s, the rise of neoliberal ideology and neoliberal influenced policies has only perpetuated this phenomenon. As a result, the government now increasingly prioritizes corporate profit over the social and cultural welfare of its citizens. The effects of the neoliberal era on cultural institutions are perhaps most evident at history museums, where revenue has plummeted and models of funding have undergone vast changes. However, the history museum is not yet vanquished. Despite the trend to underfund and defund history museums, each year millions of Americans still seek out history museums for education, enjoyment, and a sense of community. In fact, according to the American Alliance of Museums, more Americans visit museums each year than attend professional sporting events.²⁵⁰ Many of the museum professionals who participated in this study gave their expert opinions on how to best mitigate the tumultuous funding landscape. The underlying message in their responses is exceedingly clear; the history museum is an institution worth fighting for.

POTENTIAL STRATEGIES TO COMBAT UNDERFUNDING

²⁵⁰ Wilkening Consulting for the American Alliance of Museums, "2018 Broader Population Sampling," accessed April 7, 2023, https://www.aam-us.org/programs/about-museums/museum-facts-data/#_edn13; Wilkening Consulting for the American Alliance of Museums, "2023 Broader Population Sampling," accessed April 7, 2023, https://www.aam-us.org/programs/about-museums/museum-facts-data/#_edn13.

Museum professionals identified education for funders, both government and otherwise, as the most important way forward for the history museum. However, it is obvious that museums already work exceptionally hard to advertise their cultural, historic, and economic merit to their funders, and that they are well versed at doing so. It is also evident, though, that despite their efforts, many funders still do not see history museums as intrinsically valuable repositories of knowledge and understanding. Instead of only promoting their societal benefits, museum professionals should also be able to articulate how the current funding landscape impedes their missions and stifles their growth. Furthermore, they should be able to demonstrate, with evidence, the consequences that occur when history museums fail. To do so, it is imperative for more scholars to study the effects of neoliberalism and underfunding at history museums. However, it is essential to note that advocacy efforts should be accomplished without placing blame, as doing so may drive funders to abandon the history museum rather than meet its needs. The end goal of these efforts should be to convince governments of all levels to modify tax codes to increase corporate tax rates, which could then be funneled to a plethora of social programs, including cultural institutions.

While education on the effects on neoliberal influenced policy is vital, it is equally as important for museums to educate their constituents. As Holli Saperstein stated, “it is our job as history museums to impart on the community [the importance of] what we teach their children, what we offer as far as a sense of community and educational opportunities.”²⁵¹ Ernest Dollar suggested that this can be improved through establishing relationships with the public education system. “We should work better with the school district,” said Dollar, “to not only give teachers

²⁵¹ Holli Saperstein (executive director of the Wilmington Railroad Museum), interview with author, Zoom, January 26, 2023.

a rewarding outside of the classroom experience for their students but allow us as [experts] to help them educate on historical topics that they may not have the tools or the language to do.”²⁵²

The traditional way for museums to connect with school aged children is through field trips. To make better use of this type of programming, museums should work with public school systems on a city, county, or state-wide level to target a particular grade for annual visits. This solution is best implemented when the content at history museums matches the state’s history curriculum. For example, all eighth graders in North Carolina are expected to understand “how slavery, segregation, voter suppression, reconcentration, and other discriminatory practices have been used to suppress and exploit certain groups within North Carolina and the nation.”²⁵³ All eighth graders should have the opportunity to visit exhibits, like those at the International Civil Rights Center & Museum, where they can see firsthand those artifacts and histories that contextualize systemic oppression. This gives museums the opportunity to make lasting impacts on their local communities and helps to demonstrate their public value to both private and public funders.

Many of the questionnaire respondents and interviewees also noted the distinct lack of information about museums in North Carolina on a state-wide level. The Office of Archives and History’s *Biennial Reports* offers the best source of information on external factors and systemic issues that affect museums. However, these reports tend to focus on the welfare of state-owned museums, which constitute only a small portion of North Carolina’s history museums. Even the North Carolina Museums Council only posts sporadic updates and articles, and does not provide any reports that track, for example, financial health at museums in the state. It would be ideal if the North Carolina Museums Council began to issue an annual museum survey to its

²⁵² Ernest Dollar (executive director of the COR Museum), interview with author, Raleigh, NC, January 27, 2023.

²⁵³ State Board of Education, “North Carolina Social Studies Standards for Grade 8,” February 4, 2021, 5, <https://www.dpi.nc.gov/social-studies-8th-grade-standards-fall-2021-implementation/open>.

membership, or any willing participants, similar to the American Museum Survey that the Institute of Museum and Library Services launched in 2023. This survey should ask respondents to report financial information such as yearly revenue, yearly expenses, and funding by source type. It should also ask museums to provide updates on new projects or recent struggles. The Council should then publish their findings publicly, so that all museums in North Carolina can see overarching trends in funding and wellbeing.

Despite the lack of fiscal research on both the national and state level, it is evident that history museums struggle to compete with other types of museums for federal and state appropriations, grants, and private donations. To combat underfunding, history museums should collaborate with other types of museums on grant applications to make themselves more competitive candidates. History museums could work with art, science, or children's museums to develop joint exhibits that address commonalities in their content and audience bases. For example, the Charlotte Museum of History and the Sullenberger Aviation Museum, a science, technology, and math-based museum in Charlotte, NC, could produce a joint exhibit on Charlotte's aviation industry. The aviation museum could cover the more technical aspects of flight mechanics, while the history museum could develop content on famous aviators or significant events. Ideally, the exhibit would be housed in a common space and promoted equally by both museums. The joint exhibit would cultivate interest in both museums and appeal to funders who favor other types of museums over history museums. Joint collaborations could work in multiple ways to circumvent funding disparities between different types of museums.

AVENUES FOR FURTHER RESEARCH

Though this study was made to be comprehensive, there are many potential avenues for further research. However, it is necessary to first warn other researchers of the impediments that

they may encounter when dealing with controversial topics such as neoliberalism and museum funding. For the subsection “Responses from Museum Directors and Staff,” emails were sent to twenty-three museum professionals asking them to participate in a short questionnaire.²⁵⁴ Nine of the museums never responded to the prompt, despite follow up emails and phone calls. Seven others did respond to the initial email, but either preferred not to participate or never returned their questionnaires. It is likely that some respondents intended to participate but were busy with more pressing matters, as is common with museums that have less than optimal staff. However, there were others that indicated that they not only felt uncomfortable responding, but that there were more senior staff members or governing bodies who would not condone their participation. Even among those who did consent to the study, many maintained that their anonymity was crucial to avoid complicating their current or future funding relationships. The overall reluctance that museum professionals demonstrated significantly hindered research efforts required for this study. In one instance, the “History for Sale” chapter was even rejected from a museum symposium for college students in another state because the host museum feared that their primary government funder would view the work as a protest of their appropriations. Though this work has emphasized the importance of identifying the causes and effects of underfunding, it is also evident that discourse on such matters is discouraged within the museum discipline.

Regardless, these issues must be studied if the current funding landscape is to ever be rectified. One of the primary goals of this work is to call to action all those concerned with the current state of history museums. This, however, cannot be accomplished if the research on the relationship between neoliberalism and underfunding pertains to North Carolina alone. Museum

²⁵⁴ When possible, emails were sent directly to the museums’ directors or other staff rather than general information emails.

scholars in other states should pursue similar avenues of research that include both qualitative and quantitative evidence. While this study did not cover the topic, other scholars could investigate whether part-time staff, interns, and volunteers are being used as a replacement for full time workers. It would also be particularly insightful to research places where state or local governments have rejected neoliberal influenced policies. These studies could compare the financial health of cultural institutions between regions where neoliberal influenced policies are more or less prevalent. A comparative study on the differences in funding between history museums and art, science, and children's museums would also illuminate if neoliberal influenced policies disproportionately impact history-based cultural institutions. Ultimately, a study on the national level would be required to conclude with certainty if neoliberalism is the root cause of financial peril at history museums across the country.

COVID-19 AND THE FUTURE OF THE HISTORY MUSEUM

If the Great Recession of 2008 was an accurate indicator of how cultural institutions fare in times of economic uncertainty, the COVID-19 Recession may spell further disaster for the history museum. Though the participants in this study revealed that the pandemic provided increased grant opportunities and, once social distancing mandates were lifted, improved attendance, these positive outcomes may not persist if the nation's economy continues to falter. One contributing factor is that the public is not always aware of the effects that recessions have on museums. A 2020 study from the American Alliance of Museums found that while 75% of people were worried about restaurants and business, only 25% felt the same about museums. Some of the participants were influenced by the misconception that most museums are government entities, and so they did not realize that the state of the economy impacts museums

at similar rates as private businesses.²⁵⁵ Museums have also noticed concerning visitation trends. As of 2022, museum attendance rates are still down 38% compared to pre-pandemic rates.²⁵⁶ As for the financial impacts of the pandemic, a 2021 study from the International Council of Museums found that museum professionals anticipated a plethora of adverse effects; 27.1% expected to downsize their staff, 48.9% foresaw reduced exhibitions, 28% predicted losses in public funds, and 26.6% anticipated losses in private funds.²⁵⁷ As of mid-2023, the COVID-19 Recession is ongoing and may yet get worse. In these perilous times, it is necessary to acknowledge that federal and state policy directly affect the condition of the United States economy and thus the wellbeing of cultural institutions. To ensure the longevity of the history museum, it is perhaps more important than ever to advocate for the end of the neoliberal era.

²⁵⁵ Wilkening Consulting for the American Alliance of Museums, “Museums and the Pandemic: Data Story #4,” accessed April 7, 2023, https://www.wilkeningconsulting.com/uploads/8/6/3/2/86329422/museums_and_the_pandemic_-_data_story_4_-_wilkening_consulting.pdf.

²⁵⁶ Wilkening Consulting for the American Alliance of Museums, “National Snapshot of COVID-19 Impact on United States Museums (fielded December 2021-January 2022),” February 8, 2022, <https://www.aam-us.org/2022/02/08/national-snapshot-of-covid-19-impact-on-united-states-museums-fielded-december-2021-january-2022/>.

²⁵⁷ International Council of Museums, “Museums, Museum Professionals and Covid-19: Third Survey,” July 5, 2021, 12, https://icom.museum/wp-content/uploads/2021/07/Museums-and-Covid-19_third-ICOM-report.pdf.

APPENDIX A: Questionnaire for Current/Former Museum Professionals of History Museums in North Carolina

PRINCIPAL INVESTIGATOR

Shelby Dains

University of North Carolina at Charlotte Graduate School

Public History

PURPOSE OF STUDY

You are being asked to take part in a research study on the history of funding challenges for history museums in North Carolina. This research will be used to create Shelby Dains' Master of Public History thesis at the University of North Carolina at Charlotte. The purpose of this study is to identify the cause(s) of defunding and underfunding at history museums and what effects defunding and underfunding have on history museums. In addition, I am interested in how policy and government contribute to or alleviate funding challenges for history museums in North Carolina.

QUESTIONS

1. What history museum do you or did you work at?
2. What years have you been working/did you work at your museum? EX. 2004-2020.
3. How would you assess the funding that your museum receives currently? Is the dollar amount of funding you receive adequate to fulfill the museum's needs, including but not limited to exhibits, programming, and staffing?
4. How would you assess the funding that your museum received in the past? What years or period of years was the dollar amount of funding you received adequate or inadequate in fulfilling the museum's needs?
5. Does the dollar amount of funding you receive affect the type of exhibits or the quality of exhibits at your museum? Has this changed over time and if so in what ways? Please be as specific as you can.

- 6. What type(s) of funding does your museum receive (ex. corporate, local/city government, State Government, entry fees, gift shop, private donors, etc.)? Has the source of your funding changed over time, and, if so, in what ways? Please be as specific as you can.**
- 7. Has the rate of attendance at your museum changed over time? Have there been years with more or less attendance and, if so, what do you think caused those fluctuations?**
- 8. In your opinion, what factors affect the funding at history museums? What is your evidence for saying so?**
- 9. Do you know of other people who work or have worked at your museum who can provide more information or information about different periods of time? For example, this might be a coworker or retired person who started working at the museum before you and has information about years or time periods that you may not know about.**
- 10. Would you be interested in participating in a more in-depth case study which may involve further interviews, oral histories, and a deeper dive into your museum's funding (such as looking at tax documents and/or financial statements)? If you answer yes, leave your email and the researcher will contact you.**

APPENDIX B: Total Revenue of State-Owned History Museums in NC (1980-2020)

Fiscal Year	State/Regional Museum Appropriations (unadjusted)	State/Regional Museum Appropriations (2022 USD)	Maritime System Appropriations (unadjusted)	Maritime System Appropriations (2022 USD)	Nonprofit Revenue (all museums) (2022 USD)
1980	\$593,021.00	\$2,124,521.04			
1981	\$640,214.00	\$2,070,742.83			
1982	\$658,967.00	\$2,002,421.61			
1983	\$793,834.00	\$2,354,293.92			
1984	\$851,237.00	\$2,259,307.99			
1985	\$793,834.00	\$2,181,762.17			
1986	\$851,237.00	\$2,303,206.33			
1987	\$1,479,717.00	\$3,852,413.30			
1988	\$1,580,678.00	\$3,952,041.82			
1989	\$1,745,146.00	\$4,156,309.29			
1990	\$2,019,760.00	\$4,589,006.24			
1991	\$2,070,427.00	\$4,503,801.98			
1992	\$2,718,896.00	\$5,733,406.63			
1993	\$3,507,985.00	\$7,197,588.39			
1994	\$4,302,169.00	\$8,589,147.05			
1995	\$4,246,189.00	\$8,249,468.15			
1996	\$4,090,081.00	\$7,718,425.72			
1997					
1998			\$1,084,907.00	\$1,969,558.25	
1999			\$857,140.00	\$1,523,395.38	
2000			\$886,808.00	\$1,520,485.69	
2001	\$5,564,079.00	\$9,287,341.24	\$1,148,668.00	\$1,917,311.33	\$1,955,659.42
2002	\$5,546,032.00	\$9,123,576.77	\$1,127,646.00	\$1,855,049.67	\$1,770,100.02
2003	\$4,995,461.00	\$8,048,043.52	\$979,943.00	\$1,578,757.98	\$1,236,397.97
2004	\$5,027,430.00	\$7,864,344.51	\$1,013,370.00	\$1,585,201.74	\$1,950,532.36
2005	\$6,390,832.00	\$9,690,123.55	\$995,805.00	\$1,509,893.15	\$2,579,828.91
2006	\$8,140,357.00	\$11,851,559.76	\$1,060,486.00	\$1,543,963.39	\$2,679,268.30
2007	\$7,619,696.00	\$10,837,944.74	\$1,884,338.00	\$2,680,205.50	\$809,690.81

2008	\$7,380,715.00	\$9,941,302.75	\$1,360,260.00	\$1,832,174.32	\$2,232,940.42
2009	\$7,502,157.00	\$10,321,331.53	\$1,324,759.00	\$1,822,579.41	\$1,628,858.35
2010	\$7,042,133.00	\$9,570,228.09	\$1,245,778.00	\$1,693,006.88	\$2,693,884.39
2011	\$6,305,317.00	\$8,268,845.44	\$1,660,927.00	\$2,178,153.56	\$2,097,343.15
2012	\$6,188,862.00	\$8,003,401.42	\$1,657,972.00	\$2,144,080.03	\$2,013,370.99
2013	\$5,915,265.00	\$7,502,487.43	\$1,687,959.00	\$2,140,883.15	\$1,787,935.52
2014	\$5,654,697.00	\$7,031,903.50	\$1,722,166.00	\$2,141,601.07	\$2,259,500.95
2015	\$5,865,510.00	\$7,281,712.61	\$1,765,278.00	\$2,191,496.91	\$2,452,137.16
2016	\$5,932,444.00	\$7,304,390.09	\$1,735,348.00	\$2,136,667.24	\$4,217,694.12
2017	\$6,186,268.00	\$7,487,530.90	\$1,870,738.00	\$2,264,242.12	\$4,051,049.73
2018	\$6,738,226.00	\$7,921,933.00	\$1,949,588.00	\$2,292,072.94	\$3,460,730.98
2019	\$6,900,426.00	\$7,968,284.08	\$1,976,166.00	\$2,281,982.60	\$2,425,026.39
2020	\$6,513,651.00	\$7,448,209.25	\$1,976,246.00	\$2,259,791.59	\$1,652,341.23

*The outlier in this data set is Friends of the Museum North Carolina Maritime Museum INC. in 2006 (see Appendix C).

Source: The North Carolina Office of Archives and History, *Biennial Reports* from 1980-2018 (see bibliography for full citations); Stephan K. Demeritte (Chief Financial Officer of the North Carolina Museum of History), “Museum of History Budget SFY 17-18, 18-19, and 19-20,” email to author, April 6, 2023; “Friends of the Graveyard of the Atlantic Museum: Tax Filings by Year,” ProPublica, last modified December 1, 2021, <https://projects.propublica.org/nonprofits/organizations/581940114>; “Friends of the Museum North Carolina Maritime Museum INC.: Tax Filings by Year,” ProPublica, last modified 2021, <https://projects.propublica.org/nonprofits/organizations/581940114>; “Friends of the North Carolina Maritime Museum at Southport: Tax Filings by Year,” ProPublica, last modified June 17, 2021, <https://projects.propublica.org/nonprofits/organizations/561699793>; “Museum of the Albemarle INC.: Tax Filings by Year,” ProPublica, last modified July 6, 2021, <https://projects.propublica.org/nonprofits/organizations/566065293>; “Museum of the Cape Fear Historical Complex: Tax Filings by Year,” ProPublica, last modified March 1, 2021, <https://projects.propublica.org/nonprofits/organizations/582074065>; “North Carolina Museum of History Foundation: Tax Filings by Year,” ProPublica, last modified February 18, 2021, <https://projects.propublica.org/nonprofits/organizations/200988951>.

APPENDIX C: Total Revenue of Associated Nonprofits for State-Owned History Museums in NC (2001-2020) (2022 USD)

Fiscal Year	North Carolina Museum of History Foundation	Friends of the Graveyard of the Atlantic Museum	Friends of the Museum North Carolina Maritime Museum INC.	Friends of the North Carolina Maritime Museum at Southport	Museum of the Albemarle INC.	Museum of the Cape Fear Historical Complex
2001		\$1,049,456.99	\$582,868.71		\$257,010.00	\$66,323.72
2002		\$1,096,293.05	\$482,639.39		\$154,230.00	\$36,937.58
2003		\$520,816.99	\$550,310.98		\$165,270.00	
2004	\$95,634.88	\$794,985.07	\$1,059,912.41			
2005	\$351,412.66	\$1,290,753.57	\$830,994.68		\$106,668.00	
2006	\$13,200.37	\$967,848.99	\$5,605,085.47		\$101,440.00	\$1,596,778.94
2007	\$17,114.00	\$447,074.75	\$870,093.58		\$636,469.00	\$111,877.48
2008	\$45,747.66	\$271,620.56	\$1,183,038.07		\$682,617.00	\$49,917.13
2009	\$402,485.00	\$360,195.09	\$627,339.73	\$106,395.17	\$69,830.00	\$62,613.36
2010	\$1,435,847.81	\$359,491.11	\$775,294.44	\$24,875.09	\$66,497.00	\$31,878.94
2011	\$579,225.64	\$267,402.16	\$731,554.29	\$294,786.93	\$88,213.00	\$136,161.13
2012	\$862,051.98	\$322,227.46	\$587,595.21	\$116,289.01	\$88,203.00	\$37,004.33
2013	\$734,232.12	\$274,605.16	\$606,884.02	\$52,087.66	\$78,428.00	\$41,698.56
2014	\$1,241,876.06	\$244,174.40	\$479,347.94	\$148,494.28	\$105,087.00	\$40,521.27
2015	\$1,065,575.02	\$257,379.50	\$600,316.66	\$278,978.45	\$94,801.00	\$155,086.53
2016	\$3,048,894.85	\$237,556.06	\$625,101.90	\$138,028.81	\$120,544.00	\$47,568.50
2017	\$2,369,987.20	\$200,330.94	\$1,088,865.96	\$86,672.98	\$229,236.00	\$75,956.65
2018	\$2,291,779.89	\$203,195.91	\$607,053.68	\$119,037.56	\$172,623.00	\$67,040.94
2019	\$1,021,047.47	\$221,740.16	\$706,388.17	\$237,322.50	\$152,278.00	\$86,250.09
2020	\$856,134.97	\$111,731.70	\$504,770.17	\$60,189.30	\$69,206.00	\$50,309.09

Source: “North Carolina Museum of History Foundation: Tax Filings by Year,” ProPublica, last modified February 18, 2021, <https://projects.propublica.org/nonprofits/organizations/200988951>; “Friends of the Graveyard of the Atlantic Museum: Tax Filings by Year,” ProPublica, last modified December 1, 2021, <https://projects.propublica.org/nonprofits/organizations/581940114>; “Friends of the Museum North Carolina Maritime Museum INC.: Tax Filings by Year,”

ProPublica, last modified 2021,
<https://projects.propublica.org/nonprofits/organizations/581940114>; “Friends of the North Carolina Maritime Museum at Southport: Tax Filings by Year,” ProPublica, last modified June 17, 2021, <https://projects.propublica.org/nonprofits/organizations/561699793>; “Museum of the Albemarle INC.: Tax Filings by Year,” ProPublica, last modified July 6, 2021, <https://projects.propublica.org/nonprofits/organizations/566065293>; “Museum of the Cape Fear Historical Complex: Tax Filings by Year,” ProPublica, last modified March 1, 2021, <https://projects.propublica.org/nonprofits/organizations/582074065>.

APPENDIX D: State Appropriations to the Office of Archives and History (1969-2017)

Fiscal Year	Appropriations (unadjusted)	Appropriations (2022 USD)
1969	\$1,115,376.00	\$8,979,867.93
1970	\$1,632,495.00	\$12,401,771.50
1971	\$1,959,423.00	\$14,263,636.58
1972	\$2,059,101.00	\$14,559,957.23
1973	\$1,978,447.00	\$13,231,746.35
1974	\$2,445,778.00	\$14,668,528.80
1975	\$2,696,780.00	\$16,739,085.63
1976	\$3,062,207.00	\$15,888,939.42
1977	\$3,184,648.00	\$15,467,783.13
1978	\$3,948,992.00	\$17,808,090.62
1979	\$4,767,550.00	\$19,322,991.02
1980	\$5,935,003.00	\$21,262,381.49
1981	\$6,545,920.00	\$21,172,478.10
1982	\$7,061,398.00	\$21,457,669.27
1983	\$6,780,218.00	\$20,108,266.95
1984	\$7,237,088.00	\$20,597,266.90
1985	\$10,811,177.00	\$29,713,286.43
1986	\$11,247,656.00	\$30,432,972.87
1987	\$13,252,919.00	\$34,503,706.76
1988	\$13,129,618.00	\$32,826,925.76
1989	\$11,462,639.00	\$27,299,878.07
1990	\$12,141,505.00	\$27,586,169.75
1991	\$14,726,367.00	\$32,034,281.27
1992	\$16,247,702.00	\$34,261,951.30
1993	\$14,963,748.00	\$30,702,211.93
1994	\$16,642,554.00	\$33,226,343.19
1995	\$16,498,487.00	\$37,744,463.62
1996	\$16,549,241.00	\$35,611,776.61
1997	\$13,917,104.00	\$25,690,367.00
1998	\$17,546,487.00	\$31,854,184.94
1999	\$22,312,795.00	\$39,656,542.60
2000	\$18,628,174.00	\$31,939,125.46
2001	\$24,194,901.00	\$40,385,174.58
2002	\$23,546,975.00	\$38,736,277.42
2003	\$24,443,740.00	\$39,380,606.37
2004	\$26,381,456.00	\$41,268,174.54
2005	\$22,122,102.00	\$33,542,722.06

2006	\$27,094,502.00	\$39,446,932.06
2007	\$27,648,301.00	\$39,325,815.43
2008	\$29,923,302.00	\$40,304,578.14
2009	\$29,565,955.00	\$40,676,304.65
2010	\$28,233,263.00	\$38,368,881.52
2011	\$26,620,386.00	\$34,910,196.80
2012	\$25,654,342.00	\$33,176,050.31
2013	\$26,754,139.00	\$33,932,983.80
2014	\$26,841,752.00	\$33,379,084.64
2015	\$26,162,426.00	\$32,479,233.22
2016	\$27,531,738.00	\$33,898,769.91
2017	\$28,753,801.00	\$34,802,076.69

Source: North Carolina Office of Archives and History, “Appendix 3: Annual Appropriations and Expenditures, 1966–2016,” in the *Fifty-Seventh Biennial Report of the North Carolina Office of Archives and History*, 2019, 172,
<https://digital.ncdcr.gov/digital/collection/p16062coll9/id/541699>.

	Greensboro History Museum	International Civil Rights Center & Museum	Museum of Durham History	Levine Museum of New South	Old Salem Museums and Gardens	MUSE Winston Salem	The Wilmington Railroad Museum	Wrightsville Beach Museum of History	Charlotte Museum of History	Wake Forest Historical Museum	International Lineman's Museum	The North Carolina Baseball Museum	New Bern Firemen's Museum	Tartans Museum and Heritage Center
Fiscal Year														
2000										\$53,055.83				
2001	\$251,403.24	\$984,688.06		\$3,505,695.39				\$86,424.60	\$3,257,268.58	\$129,289.81				\$323,865.55
2002	\$316,787.59	\$976,510.28		\$2,815,550.75	\$8,206,477.27		\$136,828.48	\$74,504.35	\$2,657,369.43	\$59,953.98				\$513,676.12
2003	\$269,018.77	\$1,246,901.53		\$2,836,038.23	\$5,712,347.01		\$244,962.26	\$104,829.90	\$3,771,572.87	\$59,192.84				\$202,110.50
2004	\$527,032.15	\$5,052,441.50		\$2,555,973.25	\$13,483,092.38		\$163,491.20	\$72,457.96	\$1,616,446.01	\$112,976.18			\$126,095.63	\$292,983.18
2005	\$851,934.50	\$2,342,934.89		\$5,350,896.77	\$18,172,141.20		\$150,954.08	\$92,246.41	\$1,927,782.61	\$90,372.57			\$126,960.48	\$291,980.45
2006	\$1,389,946.85	\$1,835,298.34			\$11,637,711.64		\$177,926.80		\$2,004,622.05	\$87,009.41		\$33,749.26	\$115,027.88	
2007	\$906,318.97	\$1,738,722.32		\$4,145,868.05	\$13,484,094.60	\$863,129.23	\$184,736.44	\$72,995.48	\$2,085,769.07	\$219,118.71		\$31,889.29	\$140,780.85	\$869,611.93
2008	\$739,528.29	\$4,320,137.60		\$4,990,401.84	\$13,953,519.40	\$130,613.01	\$179,222.01	\$61,808.02	\$2,318,012.86	\$447,018.42		\$134,534.01	\$144,804.35	\$73,347.05
2009	\$233,389.92	\$16,997,289.90		\$3,208,395.33	\$3,660,523.99	\$170,217.44	\$164,817.18	\$63,275.51	\$1,721,684.60	\$744,186.49		\$63,468.94	\$154,326.95	\$455,602.55
2010	\$122,583.70	\$2,751,276.15		\$2,183,544.19	\$6,369,980.27	\$123,735.15	\$180,811.36	\$81,724.28	\$1,952,307.01	\$1,114,926.81		\$66,362.48	\$177,386.98	\$315,012.47
2011	\$413,836.68	\$2,287,960.89	\$13,796.74	\$2,437,845.25	\$8,299,884.80	\$391,133.09	\$186,837.58	\$97,322.83	\$1,054,747.28	\$173,903.30		\$64,690.46	\$172,523.64	\$115,603.27
2012	\$327,272.33	\$719,903.33	\$108,757.21	\$2,653,172.55	\$8,097,566.63	\$216,152.16	\$200,625.01	\$78,281.38	\$1,112,579.51	\$409,157.56		\$33,720.04	\$107,792.92	\$311,055.92
2013	\$223,833.43	\$771,867.41	\$209,254.16	\$3,754,194.79	\$11,595,295.95	\$214,252.66	\$196,838.50	\$79,134.62	\$1,104,680.51	\$105,375.78		\$18,484.59	\$101,255.58	\$376,008.08
2014	\$359,505.98	\$857,748.26	\$230,237.98	\$3,348,918.63	\$10,183,887.19	\$136,518.41	\$227,531.51	\$85,143.90	\$272,836.66	\$211,683.04	\$72,262.74	\$25,593.52	\$192,056.49	\$154,611.93
2015	\$246,765.66	\$1,149,915.84	\$215,852.90	\$2,714,239.70	\$18,836,094.60	\$189,098.51	\$196,950.87	\$91,091.81	\$366,023.64	\$230,443.83	\$70,546.40	\$17,976.13	\$134,336.85	\$231,267.69
2016	\$240,687.37	\$2,089,425.43	\$234,453.01	\$2,795,612.12	\$7,551,062.02	\$186,851.32	\$318,687.57	\$90,789.79	\$479,643.73	\$130,898.21	\$8,065.99	\$23,297.93	\$198,684.98	\$162,733.37
2017	\$193,034.30	\$2,055,843.47	\$282,119.33	\$2,171,859.05	\$9,172,962.61	\$113,659.17	\$222,156.74	\$117,285.71	\$704,829.58	\$289,683.30	\$8,311.45	\$18,957.67	\$173,131.67	\$318,511.28
2018	\$311,599.90	\$395,332.58	\$303,854.33	\$1,872,648.50	\$6,847,320.61	\$131,050.44	\$220,797.78	\$137,320.27	\$408,510.77	\$148,486.51	\$26,473.75		\$135,684.12	\$132,629.73
2019	\$426,270.32	\$409,250.05	\$1,113,285.25	\$2,171,954.78	\$8,659,805.61	\$655,426.84	\$194,235.64	\$333,704.01	\$727,947.80	\$148,849.01	\$17,538.38		\$77,594.75	\$108,613.71
2020	\$375,328.57		\$575,118.99	\$2,069,500.11	\$3,647,873.38	\$444,894.65	\$211,940.69	\$229,054.06		\$115,218.97	\$7,712.75		\$71,150.56	\$81,800.90
2021				\$2,460,696.78									\$64,613.50	

Source: “Charlotte Museum of History INC.: Tax Filings by Year,” ProPublica, last modified October 7, 2021, <https://projects.propublica.org/nonprofits/organizations/237125613>; “Friends of the New Bern Firemen’s Museum INC.: Tax Filings by Year,” ProPublica, last modified November 12, 2020, <https://projects.propublica.org/nonprofits/organizations/753117297>; “Greensboro Historical Museum INC.: Tax Filings by Year,” ProPublica, last modified 2021, <https://projects.propublica.org/nonprofits/organizations/560629340>; “International Lineman’s Museum INC.: Tax Filings by Year,” ProPublica, last modified 2021, <https://projects.propublica.org/nonprofits/organizations/562169758>; “MUSE Winston-Salem: Tax Filings by Year,” ProPublica, last modified September 17, 2021, <https://projects.propublica.org/nonprofits/organizations/562039230>; “Museum of Durham History INC.: Tax Filings by Year,” ProPublica, last modified May 17, 2021, <https://projects.propublica.org/nonprofits/organizations/943455685>; “Museum of the New South INC.: Tax Filings by Year,” ProPublica, last modified January 11, 2021, <https://projects.propublica.org/nonprofits/organizations/561748648>; “North Carolina Baseball Museum INC.: Tax Filings by Year,” ProPublica, last modified November 5, 2018, <https://projects.propublica.org/nonprofits/organizations/300407098>; “Old Salem Incorporated: Tax Filings by Year,” ProPublica, last modified June 18, 2021, <https://projects.propublica.org/nonprofits/organizations/560587289>; “Scottish Heritage USA INC.: Tax Filings by Year,” ProPublica, last modified July 6, 2021, <https://projects.propublica.org/nonprofits/organizations/136218203>; “Sit-In Movement INC.: Tax Filings by Year,” ProPublica, last modified 2020, <https://projects.propublica.org/nonprofits/organizations/561856093>; “Wake Forest Birthplace Society INC.: Tax Filings by Year,” ProPublica, last modified May 10, 2021, <https://projects.propublica.org/nonprofits/organizations/566072013>; “Wilmington Railroad Museum Foundation INC: Tax Filings by Year,” ProPublica, last modified November 24, 2020, <https://projects.propublica.org/nonprofits/organizations/561537564/>; “Wrightsville Beach Museum INC.: Tax Filings by Year,” ProPublica, last modified 2021, <https://projects.propublica.org/nonprofits/organizations/562082869>.

APPENDIX F: Average Total Revenue at Nonprofit History Museums in NC (2001-2020)

Fiscal Year	Average Total Revenue (2022 USD)	Average Total Revenue without High Outliers (2022 USD)
2001	\$1,219,805.03	\$1,219,805.03
2002	\$1,750,850.92	\$943,897.62
2003	\$1,605,219.32	\$1,091,828.36
2004	\$2,400,299.14	\$1,168,877.67
2005	\$2,939,820.40	\$1,247,340.31
2006	\$2,463,934.71	\$934,971.89
2007	\$2,246,467.79	\$1,122,705.11
2008	\$2,487,128.44	\$1,340,489.35
2009	\$2,506,700.90	\$768,432.89
2010	\$1,397,571.67	\$900,330.81
2011	\$1,303,782.95	\$667,773.69
2012	\$1,195,193.04	\$567,704.53
2013	\$1,560,999.29	\$648,790.50
2014	\$1,256,380.21	\$512,421.29
2015	\$1,897,894.48	\$486,377.81
2016	\$792,980.31	\$229,806.84
2017	\$900,900.06	\$211,561.51
2018	\$851,669.95	\$352,032.39
2019	\$1,157,267.40	\$532,055.88
2020	\$711,781.24	\$418,172.03

*The outliers in this data set are Old Salem for all years and the ICRCM in 2009.

Source: See source for Appendix E.

APPENDIX G: Wilmington Railroad Museum Total Revenue (2002-2020)

Fiscal Year	Total Revenue (unadjusted)	Total Revenue (2022 USD)
2002	\$83,073.00	\$136,828.48
2003	\$151,866.00	\$244,962.26
2004	\$104,668.00	\$163,491.20
2005	\$99,087.00	\$150,954.08
2006	\$121,836.00	\$177,926.80
2007	\$129,898.00	\$184,736.44
2008	\$132,349.00	\$179,222.01
2009	\$119,975.00	\$164,817.18
2010	\$133,004.00	\$180,811.36
2011	\$142,328.00	\$186,837.58
2012	\$155,374.00	\$200,625.01
2013	\$155,116.00	\$196,838.50
2014	\$183,019.00	\$227,531.51
2015	\$158,617.00	\$196,950.87
2016	\$259,219.00	\$318,687.57
2017	\$183,653.00	\$222,156.74
2018	\$187,771.00	\$220,797.78
2019	\$167,905.00	\$194,235.64
2020	\$184,393.00	\$211,940.69

Source: “Wilmington Railroad Museum Foundation INC: Tax Filings by Year,” ProPublica, last modified November 24, 2020,
<https://projects.propublica.org/nonprofits/organizations/561537564/>.

APPENDIX H: Wilmington Railroad Museum Net Income (2002-2020)

Fiscal Year	Net Income (unadjusted)	Net Income (2022 USD)
2002	\$21,310.00	\$35,056.31
2003	\$83,426.00	\$134,405.23
2004	\$2,235.00	\$3,496.18
2005	\$1,587.00	\$2,406.29
2006	\$9,084.00	\$13,225.41
2007	-\$1,845.00	-\$2,624.25
2008	-\$44,665.00	-\$60,160.61
2009	-\$21,839.00	-\$30,045.70
2010	-\$26,830.00	-\$36,461.85
2011	-\$18,230.00	-\$23,906.97
2012	-\$14,424.00	-\$18,653.04
2013	-\$20,236.00	-\$25,665.86
2014	\$5,807.00	\$7,221.30
2015	-\$6,156.00	-\$7,642.34
2016	\$82,545.00	\$101,634.48
2017	-\$3,302.00	-\$3,996.57
2018	-\$6,121.00	-\$7,196.28
2019	-\$29,764.00	-\$34,370.05
2020	29,006	33,168

Source: “Wilmington Railroad Museum Foundation INC: Tax Filings by Year,” ProPublica, last modified November 24, 2020,
<https://projects.propublica.org/nonprofits/organizations/561537564/>.

APPENDIX I: Tryon Palace Revenue (1980-2020)

Fiscal Year	State Appropriations (unadjusted)	State Appropriations (2022 USD)	Tryon Palace Foundation (2022 USD)	Total Revenue
1980	\$546,594.00	\$1,958,194.49		
1981	\$619,395.00	\$2,003,404.73		
1982	\$654,479.00	\$1,988,783.80		
1983	\$749,452.00	\$2,222,669.08		
1984	\$916,828.00	\$2,609,357.66		
1985	\$748,452.00	\$2,057,034.92		
1986	\$916,828.00	\$2,480,677.01		
1987	\$1,835,273.00	\$4,778,096.16		
1988	\$1,955,093.00	\$4,888,161.47		
1989	\$1,435,926.00	\$3,419,858.61		
1990	\$1,582,302.00	\$3,595,077.51		
1991	\$2,320,000.00	\$5,046,698.38		
1992	\$2,393,964.00	\$5,048,214.08		
1993	\$1,738,323.00	\$3,566,643.94		
1994	\$1,870,296.00	\$3,733,987.99		
1995	\$1,892,526.00	\$3,676,787.10		
1996	\$1,956,508.00	\$3,692,142.45		
1997	\$2,143,678.00	\$3,957,136.09		
1998	\$2,206,140.00	\$4,005,063.33		
1999	\$2,265,468.00	\$4,026,417.50		
2000	\$1,740,247.00	\$2,983,758.22		
2001	\$1,807,714.00	\$3,017,364.92	\$488,197.75	\$3,505,562.67
2002	\$1,794,424.00	\$2,951,942.06	\$1,965,821.72	\$4,917,763.78
2003	\$2,576,145.00	\$4,150,353.11	\$538,227.88	\$4,688,580.99
2004	\$2,596,099.00	\$4,061,044.49	\$1,098,075.15	\$5,159,119.64
2005	\$3,092,804.00	\$4,689,475.94	\$923,896.17	\$5,613,372.11
2006	\$3,222,161.00	\$4,691,149.74	\$1,378,234.61	\$6,069,384.35
2007	\$3,087,840.00	\$4,392,017.65	\$1,802,933.09	\$6,194,950.74
2008	\$3,286,072.00	\$4,426,107.31	\$2,844,757.58	\$7,270,864.89
2009	\$3,353,813.00	\$4,614,115.10	\$1,245,491.74	\$5,859,606.84
2010	\$3,571,557.00	\$4,853,730.42	\$1,920,935.14	\$6,774,665.56
2011	\$4,610,905.00	\$6,046,779.37	\$1,222,041.01	\$7,268,820.38
2012	\$4,004,314.00	\$5,178,356.27	\$1,117,785.79	\$6,296,142.06
2013	\$3,468,073.00	\$4,398,648.93	\$448,720.11	\$4,847,369.04
2014	\$2,634,843.00	\$3,276,561.36	\$556,515.38	\$3,833,076.74

2015	\$3,148,053.00	\$3,908,137.10		
2016	\$3,070,606.00	\$3,780,719.05	\$870,810.20	\$4,651,529.25
2017	\$3,178,383.00	\$3,846,946.32	\$914,907.92	\$4,761,854.24
2018	\$3,017,373.00	\$3,547,436.18	\$1,491,673.52	\$5,039,109.70
2019	\$3,151,935.00	\$3,639,704.78	\$1,105,632.90	\$4,745,337.68
2020	\$3,273,336.00	\$3,742,984.00	\$1,688,369.38	\$5,431,353.38

Source: The North Carolina Office of Archives and History, *Biennial Reports* from 1980-2018 (see bibliography for full citations); “NC Budget and Spending: FY 2018, NCDCCR, Budget, General Fund, Budget and Spending Table,” Open Budget, NC Reports, accessed April 19, 2023, https://ncreports.ondemand.sas.com/SASVisualAnalytics/?reportUri=/reports/reports/b00debf51e7-45a6-92d4-3efaf33a3daa§ionIndex=0&sso_guest=true&reportViewOnly=true&sas-welcome=false; “NC Budget and Spending: FY 2019, NCDCCR, Budget, General Fund, Budget and Spending Table,” Open Budget, NC Reports, accessed April 19, 2023, https://ncreports.ondemand.sas.com/SASVisualAnalytics/?reportUri=/reports/reports/b00debf51e7-45a6-92d4-3efaf33a3daa§ionIndex=0&sso_guest=true&reportViewOnly=true&sas-welcome=false; “NC Budget and Spending: FY 2020, NCDCCR, Budget, General Fund, Budget and Spending Table,” Open Budget, NC Reports, accessed April 19, 2023, https://ncreports.ondemand.sas.com/SASVisualAnalytics/?reportUri=/reports/reports/b00debf51e7-45a6-92d4-3efaf33a3daa§ionIndex=0&sso_guest=true&reportViewOnly=true&sas-welcome=false; “Tryon Palace Foundation INC: Tax Filings by Year,” Nonprofit Explorer, ProPublica, last modified October 4, 2021, <https://projects.propublica.org/nonprofits/organizations/561795949>.

APPENDIX J: Tryon Palace Expenditures Using Earned Income (2007-2020)

Fiscal Year	Expenditures Using Income (2022 USD)
2007	\$326,872.37
2008	\$276,454.59
2009	\$250,397.80
2010	\$324,651.83
2011	\$798,143.58
2012	\$1,006,843.62
2013	\$1,049,426.04
2014	\$972,969.14
2015	
2016	
2017	\$1,361,368.04
2018	
2019	\$1,113,451.61
2020	\$871,719.30

Source: Lindy Cummings (Tryon Palace research historian), “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2007 through June, 2008,” “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2008 through June, 2009,” “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2009 through June, 2010,” “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2010 through June, 2011,” and “Tryon Palace Sources of Funding for Annual Operating Expenditures, July 2011 through June, 2012,” from the Tryon Palace Accounting Department, email to author, March 13, 2023; Tryon Palace, “Tryon Palace: 2013 Annual Report,” 2014, 7, https://www.tryonpalacefoundation.org/wp-content/uploads/2021/01/2019_Annual_Report_booklet.pdf; Tryon Palace, “Tryon Palace: 2014 Annual Report,” 2015, 6, https://www.tryonpalace.org/wp-content/uploads/2021/06/tryonannualreport2014_web.pdf; Tryon Palace, “Tryon Palace: 2015 Annual Report,” 2016, 6, https://www.tryonpalace.org/wp-content/uploads/2021/06/tp_annualreport2015_lowres.pdf; Tryon Palace, “Tryon Palace: 2018-2019 Annual Report,” 2020, 15, https://www.tryonpalacefoundation.org/wp-content/uploads/2021/01/2019_Annual_Report_booklet.pdf; Tryon Palace, “Tryon Palace: 2020 Annual Report,” 2021, 15, https://www.tryonpalacefoundation.org/wp-content/uploads/2021/05/2020_Annual_Report_booklet-1.pdf; Tryon Palace, “Tryon Palace: 2021 Annual Report,” 2022, 17, https://www.tryonpalacefoundation.org/wp-content/uploads/2022/12/2021_Annual_Report_booklet-updated-12.16.22_.pdf.

APPENDIX K: COR Museum Total Revenue (2000-2023)

Fiscal Year	Revenue from Friends of the COR Museum (2022 USD)	Earned Income (2022 USD)	Appropriations from the City of Raleigh Municipal Government (unadjusted)	Appropriations from the City of Raleigh Municipal Government (2022 USD)
2001	\$437,398.52			
2002	\$516,387.19			
2003				
2004				
2005	\$316,246.58			
2006	\$346,737.55			
2007	\$338,717.78			
2008	\$441,565.24			
2009	\$568,675.31			
2010	\$335,377.02			
2011	\$369,634.87			
2012	\$321,993.76			
2013	\$161,546.75		\$291,931.00	\$370,263.83
2014	\$219,077.60	\$29,703.46		
2015	\$148,280.77	\$41,897.55	\$265,926.13	\$330,132.87
2016	\$200,563.88	\$31,814.57		
2017	\$149,951.10	\$24,631.77	\$294,913.17	\$356,947.27
2018	\$209,425.70	\$41,388.30		
2019	\$169,580.02	\$46,996.23	\$289,846.18	\$334,700.60
2020	\$157,326.41	\$48,298.75		
2021	\$137,541.09		\$310,736.57	\$337,226.29
2022				
2023			\$418,876.06	\$418,876.06

Source: “Friends of the City of Raleigh Museum: Tax Filings by Year,” ProPublica, last modified January 10, 2022, <https://projects.propublica.org/nonprofits/organizations/582069400>; Ernest Dollar (executive director of the COR Museum), “FY 2023 Budget Document,” email to author, April 13, 2023, and “Budget Document FYs 2013, 2015, 2019, and 2021,” and “Earned Income Graph FYs 2014-2020,” email to author, April 20, 2023.

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