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CITY OF BEAUFORT
1911 BOUNDARY STREET
BEAUFORT MUNICIPAL COMPLEX
BEAUFORT, SOUTH CAROLINA 29902
(843) 525-7070
CITY COUNCIL SPECIAL WORKSESSION AGENDA
November 19, 2024

STATEMENT OF MEDIA NOTIFICATION

"In accordance with South Carolina Code of Laws, 1976, Section 30-4-80(d), as amended, all local media was duly notified of the time, date, place and agenda of this meeting."

SPECIAL WORKSESSION - City Hall, Planning Conference Room, 1st Floor - 5:00 PM

Please note, this meeting will be broadcasted via zoom and live streamed on Facebook. You can view the meeting at the City's page; City Beaufort SC

I. CALL TO ORDER

A. Philip Cromer, Mayor

II. DISCUSSION ITEMS

A. Tourism Development Advisory Committee State Accommodations Tax Grant Award Recommendations

III. PRESENTATION

A. City Owned Properties- Return on Investment Analysis

IV. ADJOURN



CITY OF BEAUFORT
DEPARTMENT REQUEST FOR CITY COUNCIL AGENDA ITEM

TO: CITY COUNCIL **DATE:** 11/13/2024
FROM: Alan Eisenman, Finance Director
AGENDA ITEM TITLE: Tourism Development Advisory Committee State Accommodations Tax Grant Award Recommendations
MEETING DATE: 11/19/2024
DEPARTMENT: Finance

BACKGROUND INFORMATION:

The Tourism Development Advisory Committee (TDAC) reviewed applications and conducted interviews with 14 entities on October 30, 2024. Please refer to attached summary TDAC grant recommendations.

Here is the link for applicant presentation to TDAC on October 30, 2024.

<https://fb.watch/vQwQTjvYMi/>

Here is the link for TDAC's discussion on their recommendations on November 6, 2024.

TDAC ATAX Award Recommendations-Meeting Recording.mp4

PLACED ON AGENDA FOR: Discussion

REMARKS:

TDAC members will discuss their recommendations with Council.

ATTACHMENTS:

Description	Type	Upload Date
ATAX Recommendations	Backup Material	11/13/2024
ATAX Recommendations Backup	Backup Material	11/13/2024
Beaufort Area Hospitality Association Application	Backup Material	11/13/2024
Beaufort County Black Chamber of Commerce Application	Backup Material	11/13/2024
Beaufort Film Society Application	Backup Material	11/13/2024
Beaufort Water Search and Rescue Application	Backup Material	11/13/2024
Freedman Arts District Application	Backup Material	11/13/2024
Friends of Hunting Island Application	Backup Material	11/13/2024
Friends of Spanish Moss Trail Application	Backup Material	11/13/2024

Greater Beaufort Port Royal CVB Marketing Application	Backup Material	11/13/2024
Greater Beaufort Port Royal CVB Sales Application	Backup Material	11/13/2024
Gullah Traveling Theatre Application	Backup Material	11/13/2024
Penn Center Application	Backup Material	11/13/2024
Port Royal Sound Foundation Maritime Museum Application	Backup Material	11/13/2024
South Carolina Lowcountry Tourism Application	Backup Material	11/13/2024
Tabernacle Church Application	Backup Material	11/13/2024
Original Gullah Festival Application	Backup Material	11/13/2024



CITY OF BEAUFORT FY2025 ATAX AWARDS

<u>Applicants</u>	<u>FY2024 Award</u>	<u>FY2025 Event</u>	<u>FY2025 Cost</u>	<u>FY2025 Other Funding</u>	<u>FY2025 Request</u>	<u>Avg. Score</u>	<u>% of Total</u>	<u>FY2025 TDAC Recommendation</u>
Greater Beaufort-Port Royal CVB	\$ 146,000	Destination Marketing	\$ 556,000	\$ 396,000	\$ 160,000	5.00	33.92%	\$ 160,000
Greater Beaufort-Port Royal CVB	34,500	Sales Plan	72,764	32,764	40,000	4.95	8.48%	40,000
Beaufort Area Hospitality Association- BAHA	18,250	Beaufort Oyster Festival 2025	198,261	50,000	18,000	4.84	3.82%	18,000
SC Lowcountry & Resort Islands Tourism	47,029	Promotion of the city of Beaufort and SC Lowcountry	898,000	410,900	61,800	4.72	13.10%	61,800
Port Royal Sound Foundation	6,650	School of Fish Exhibit for PRSF Maritime Center	13,500	4,000	9,500	4.62	2.01%	9,500
Beaufort Water Search & Rescue	-	Water Rescue Services & Water Festival Safety Patrol	45,000	25,000	20,000	4.58	4.24%	20,000
Beaufort Film Society	-	Beaufort International Film Festival 2025	230,000	60,000	15,000	4.52	3.18%	15,000
Gullah Traveling Theatre, Inc.	25,950	2024 Gullah Christmas Celebration	103,511	63,511	40,000	4.24	8.48%	30,000
Friends of Hunting Island	10,500	Hunting Island's Mobile Virtual Reality Program	30,000	1,500	15,000	4.15	3.18%	10,000
Friends of the Spanish Moss Trail	3,257	Wayfinding Signs Along Boundary Street Area	13,000	-	13,000	4.14	2.76%	13,000
Freedman Arts District	10,625	Chalk it Up Festival	72,400	50,000	20,000	4.06	4.24%	15,000
The Original Gullah Festival	33,825	2025 Original Gullah Festival	195,500	142,500	53,000	3.74	11.24%	21,500
Penn Center, Inc.	8,075	40th Heritage Days Celebration	50,000	40,000	10,000	3.41	2.12%	10,000
Beaufort County Black Chamber of Commerce	-	Gullah Roots Mapping History, Connecting Communities	32,000	-	32,000	2.19	6.78%	-
Tabernacle Baptist Church	23,875	Harriet Tubman Monument/162nd Anniversary of Combahee River Raid/HTM Dedication	\$ 550,000	\$ 521,500	\$ 28,500	0.00	6.04%	-
	\$ 368,536				\$ 535,800			
					\$ 471,663	FY2025 Total Budget Amount		\$ 423,800
					\$ (64,137)	Variance Budget/Request		
			Request to carry FY2025 unfunded amount to next year FY2026 ATAX budget					\$ 47,863

FY25 – Tourism Development Advisory Committee Recommendations

November 12, 2024

FY25 Approved Budget

Revenues	
State Accommodations Tax	\$933,333.00
Interest	\$36,000.00
Total Revenues	\$969,333.00
Expenditures	
City General Fund	\$25,000.00
DMO (30%)	\$272,500.00
City General Fund (5%)	\$45,416.00
Police Support	\$23,480.00
Downtown Twilight Hours	\$100,000.00
Affordable Housing Trust	\$31,274.00
TDAC Grants	\$471,663.00
Total Expenditures	\$969,333.00

Applicants and TDAC recommendations

Great Beaufort-Port Royal CVB / DMO – Destination Marketing

TDAC Recommendation - \$160,000.00 (Full Request)

As the DMO for the City of Beaufort they continuously show a return on ATAX Funds; recently resulting in an \$11.00 return on every dollar spent. The committee feels strongly fully funding their request as they promote Beaufort 365 days a year.

Great Beaufort-Port Royal CVB / DMO – Sales Plan

TDAC Recommendation - \$40,000.00 (Full Request)

Funds are used to attend trade shows to promote meetings, group tours, and reunions in our market; it is to ensure diversity of travel in Beaufort.

Beaufort Area Hospitality Association – Beaufort Oyster Festival

TDAC Recommendation - \$18,000.00 (Full Request)

*Vimal Desai & Chetan Patel recused themselves as they sit on the board.

This event spans over 10 days and is during the slower economic month (Jan). This event is growing year over year. It provides direct impact to heads in beds They do not have an artisan's market to ensure they are promoting local businesses DT.

SC Lowcountry & Resort Island Tourism Commission – Promotion of the City of Beaufort and the SC Lowcountry

TDAC Recommendation - \$61,800.00 (Full Request)

Peach continues to focus on high value visual content and videography for on-line digital ads; targeting 635,058 viewers. Some of the requested funds will go towards Fam Tours and Travel Shows, marketing Beaufort 365 days a year.

Port Royal Sound Foundation – School of Fish Exhibit for PRSF Maritime Center

TDAC Recommendation - \$9,500.00 (Full Request)

The center is a major attraction for our tourists year around; the committee strongly believes ensuring it is updated and does not become stale. They tell a beautiful story of our waterways which is an amazing part of the Beaufort story.

Beaufort Film Society – Beaufort International Film Festival

TDAC Recommendation - \$15,000.00 (Full Request)

The event spans over six days in February serving a "need time" to generate tourism activity. They have a direct impact on heads in beds and results in repetitive business throughout the year.

Gullah Traveling Theater – Gullah Christmas Celebration

TDAC Recommendation - \$30,000.00 (partially funded)

The event spans over four days celebrating the rich Gullah heritage in the Lowcountry during a "need time" in the market (December). The committee believes this is an important event; however, the request is high considering the three-day potential overnight accommodations.

Beaufort Water Search & Rescue – Water Rescue Services

TDAC Recommendation - \$20,000.00 (Full Request)

Volunteer organization that services Beaufort 365 days a year including all events in Beaufort; this is their first request for ATAX funds. The request is for new equipment. Per the organization, DNR has two boats in Beaufort; and Coast Guard charges for services. Beaufort Water Search & Rescue provides complimentary services and ensures everyone is safe on our water ways.

Friends of Hunting Island – Hunting Island’s Mobile Virtual Reality Program

TDAC Recommendation - \$10,000.00 (partially funded)

Hunting Island is the number one tourist destination in the county; the lighthouse is the most popular and requested attraction in the park. The committee believes this project will increase tourism to the lighthouse and the park.

Friends of Spanish Moss Trail – Wayfinding Signs along Boundary Street Area

TDAC Recommendation – \$13,000.00 (Full Request)

This infrastructure is vital to direct hotel guests to the trail by the new trail access at Beaufort Plaza Shopping Center. The trail is an important attraction to tourists through the year that should be showcased.

Freedman Art District – The Chalk it Up Festival

TDAC Recommendation - \$15,000.00 (partially funded)

2nd year they have hosted this event. The committee believes this event has a huge potential to impact heads in beds. We are requesting they change the dates for 2026 and going forward to early March or November. Also, ensure marketing is for outside the 50-mile radius; not including reimbursements for Island Packet / Beaufort Gazette and Lowcountry Weekly / Island News.

The Original Gullah Festival of South Carolina, Inc – Original Gullah Festival

TDAC Recommendation - \$21,500.00 (partially funded)

Festival is very important for Gullah tourism and has been around for 39 years. The dates of the festival are when the market is saturated. The committee believes the festival generates tourism but think it would be more warranted during slower economic months (Nov – mid Mar).

Penn Center Inc. – 40th Heritage Days Celebration

TDAC Recommendation - \$10,000.00 (Full Request)

The heritage days event happens in a "need time" for our market. The Gullah heritage is a crucial part of Beaufort's history, they attract an abundance of tourists.

Black County Chamber of Commerce – Gullah Roots: Mapping History, Connecting Communities

TDAC Recommendation - \$0.00 (no funding)

Our recommendation is based on no collaboration with CVB and competing with corporate trusted apps like Trip Advisor, Google, Yelp, etc. It is very difficult to get convergence on new apps without tons of marketing and advertising.

Tabernacle Baptist Church – Harriet Tubman Monument / 162nd Anniversary of Combahee River Raid / HTM Dedication

TDAC Recommendation - \$0.00 (no funding)

The applicant currently has \$23,875.00 of unused funds from FY24. Therefore, the committee is recommending zero funding for this request. Their initial dedication was postponed one year, which occurred in 2024. They used the FY23 funds for this year's event. They were awarded funds in FY24 in the amount of \$23,875.00 which are still available, the committee is recommending they be able to use the funds awarded in FY24 for the 2025 event.

TDAC Request

The committee is requesting the remaining \$47,863,00 in funds be placed in the special fund for FY26 distributions. Occupancy is lower this year so we want to ensure we can fund grant requests for FY26 knowing the pot is going to be smaller. We are also requesting that we update the application for a smoother process for FY26!

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Beaufort Area Hospitality Association

2. Mailing Address: PO Box 566 City: Beaufort State: South Carolina Postal Code: 29901

3. Project Director: Ashlee Houck, CEO Beaufort Area Hospitality Association

Project Treasurer or Administrative Official: Ashlee Houck

Telephone #: 843 707 2705 Email: Ashlee@bfthospitality.com

4. Event or Project Name: Beaufort Oyster Festival 2025

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

There has been no accommodations tax funding awarded for 2025 event. We have received funding in previous years. We received \$18,250 for the 2024 event.

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects. **NA**

List any Accommodations Tax funds that have previously been awarded from other municipalities or counties for this proposed event or project.

We have not received funding from other sources at this time. We have applied to Beaufort County for State & Local ATAX. \$20,000 State & \$30,000 Local but that is yet to be determined.

5. Dates you will begin and complete work on your event or project: Begin – Month/Year October 24 End – Month/Year January 25

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

Non-profit organization registered with the Secretary of South Carolina

Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10

Other Non-profit organization

Government or governmental agency

For-profit organization

7. Federal Employee Identification number (EIN): 82-5361976

8. Total Estimated Costs of the Proposed Event or Project: \$ 198,260.50

Accommodation Tax Funds Requested: \$ 18,000

Project Funding from Other Sources: \$ To be determined

9. Source of Applicant's Other Funds: Sponsorships

10. What is the anticipated total attendance for your event? 7,000+

Total "tourist" anticipated? 2,000+

1. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

The Beaufort Area Hospitality Association is grateful for our partners at The Greater Beaufort-Port Royal Convention & Visitors Bureau for providing marketing analytics and insights regarding the Beaufort Oyster Festival. We have worked closely with the CVB for the last 5 years on the event and marketing plan to optimize our reach and overall goal. BAHA also works with the SC Lowcounty Tourism Coalition to market the event and optimize our reach.

2. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

We intend to utilize the funding to support our marketing expenses.

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

The full event is conceived as an 11-day festival week coinciding with Tides to Tables in conjunction with South Carolina Restaurant Week and culminating in a festival weekend at Henry C. Chambers Waterfront Park in Downtown Beaufort. Area businesses, agri-tourism and eco-cultural businesses, agencies and non-profits will be invited to participate in the event throughout the week in educational, artisan and oystering programs and demonstrations.

We are seeking funding for the upcoming 5th Annual Beaufort Oyster Festival and the concurrent Tides to Tables Restaurant Week. These events have historically benefitted from the generous support of the ATAX grant.

Launched in January 2021, the Beaufort Oyster Festival was created to showcase our local heritage and celebrate the oyster industry, a vital part of our culture. The festival aims to stimulate economic activity during the slower shoulder months. Over the years, it has grown into a key event that significantly bolsters our local economy.

The festival has experienced substantial growth in both attendance and economic impact annually. This growth highlights the strategic importance of cultural events in fostering economic development and preserving regional heritage. The success of the Beaufort Oyster Festival demonstrates how local culture, and resources can drive economic progress.

We are grateful for the ongoing support that has brought our vision to life and are excited to continue this positive trend. With your funding, we aim to further elevate the Beaufort Oyster Festival and Tides to Tables Restaurant Week, ensuring they remain pivotal to our community's economic vitality and cultural celebration.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

The Beaufort Area Hospitality Association (BAHA) is committed to supporting the tourism and hospitality sector while nurturing community spirit in the Beaufort area. Our mission is to enhance the region's appeal as a top tourist destination through innovative initiatives and events.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a “percentage of tourism” basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

BOF occurs in January which is considered a shoulder month- a slow time in the market. The festival aids in bringing economic activity to the Beaufort area and supports local businesses when times are significantly slow. BOF coincides with Tides to Tables Restaurant Week and offered educational elements, a 5k run, entertainment, a cornhole tournament and a culinary competition. tournament and a culinary competition.

We have continually seen growth in this event year over year. BAHA expects well over 2,000 tourists to this event. BAHA also is extremely strategic in the festival event schedule. Restaurant week starts the previous Thursday leading up to the festival. The event is held on Saturday and Sunday. This is to encourage overnight stays.

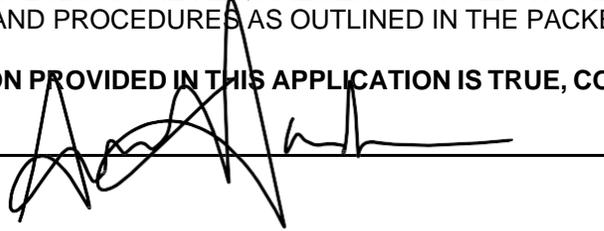
A. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

Performance goals will be measured through social media impressions, press and media analytics, ticket sales and attendance, as well as lodging reports/STAR data.

The Greater Beaufort-Port Royal Convention & Visitors Bureau will be providing key data and analytics.

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: 

Date: September 11, 2024

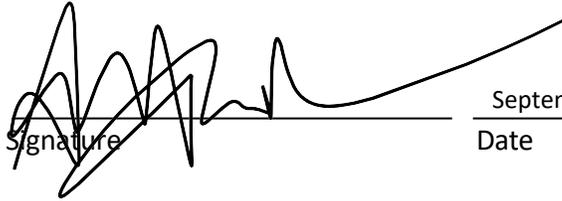
Return to: **CITY OF BEAUFORT**
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Ashlee Houck have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

Ashlee Houck
Printed Name


Signature

September 11, 2024
Date

2025 BEAUFORT OYSTER FEST - Tides to Tables BUDGET

	<i>Beaufort Oyster Festival</i>	<i>Restaurant Week</i>		<i>Oyster Boogie 5k</i>		
Income						
Food & Beverage		\$ 90,000.00				
Vendor Entry Fees: Food		\$ 1,350.00				
5k Run entry		\$ 3,900.00				
Cornhole Entry		\$ 700.00				
Sponsorships/In-Kind		\$ 15,000.00				
Hotel Sponsorship		\$ 20,000.00				
A-Tax City		\$ 18,000.00				
A-Tax County State & Local		\$ 50,000.00				
TOTAL INCOME		\$198,950	\$ -	\$ -	BUDGETED	
EXPENSES						
Marketing and Promotional Fees		BUDGET	DEPOSIT	BALANCE	VENDOR	NOTES
Social Media		\$ (5,000.00)	\$ -	\$ -		
Influencers		\$ (600.00)	\$ -	\$ -		
Billboards		\$ (2,500.00)	\$ -	\$ -		
Radio		\$ (1,700.00)	\$ -	\$ -		
Media		\$ (5,000.00)	\$ -	\$ -		
Banner		\$ (250.00)	\$ -	\$ -		
Print		\$ (1,500.00)	\$ -	\$ -		
Photography		\$ (2,500.00)	\$ -	\$ -		
Magazine		\$ (5,000.00)	\$ -	\$ -		Value
Subtotal		\$ (24,050.00)				
Print Goods						
Signage / Flyers		\$ (2,000.00)	\$ -	\$ -	Banners/Flyers/Etc	
Tickets		\$ (1,500.00)	\$ -	\$ -	Uprinting	
Subtotal		\$ (3,500.00)				
Service Providers						
Insurance		\$ (1,500.00)	\$ -	\$ -		
Portalets		\$ (1,519.01)	\$ -	\$ -		
Entertainment		\$ (15,000.00)	\$ -	\$ -		
Subtotal		\$ (18,019.01)				
Fees						
Venue / Public Works Fees (Water)		\$ -	\$ -	\$ -		
Event Rentals		\$ (15,000.00)	\$ -	\$ -	Amazing Events	
			\$ -	\$ -		
Administrative Fee		\$ (15,000.00)	\$ -	\$ -		

		Subtotal	\$	(30,000.00)			
Food & Beverage Fees							
	Waste Disposal		\$	(2,000.00)	\$ -	\$ -	
	Beverage Purchase		\$	(10,000.00)			Beer, wine, water, soda
	Oysters		\$	(8,000.00)			
	Ice		\$	(1,773.75)			
	Food Vendor Payout		\$	(60,000.00)	\$ -	\$ -	
		Subtotal	\$	(81,773.75)			
Misc Fees							
	EMS (Safety)		\$	(1,260.00)		\$ -	City of Beaufort Paramedics/Security on site
	Beaufort Police		\$	(4,000.00)			City of Beaufort
	Sherriffs Office 5k Run		\$	(250.00)			Sheriffs
	Coastal Security		\$	(750.00)			Overnight Security
	Ground Running 5K management		\$	(800.00)			Tim Waz
	Brian Perkins - CornHole Tournament Mgmt		\$	(300.00)			
	Cornhole Boards		\$	-			
	Cornhole Tournament Prizes		\$	(600.00)			
	5K Run Prizes - medals etc.		\$	(2,000.00)			
	Oyster Boogie Shirts		\$	(3,500.00)			
	Volunteer Shirts - supplies		\$	(1,500.00)			
	Shirts - Merch		\$	(7,500.00)	\$ -	\$ -	
	Supplies		\$	(2,500.00)			Pans/Towels/Shucker Etc
	Parking Spots		\$	(850.00)			
	ABL - SLED		\$	(107.74)	\$ -	\$ -	
	Sound for Entertainment & Lighting		\$	(13,000.00)			
	Sponsorship Dinner Event Friday Supplies		\$	(500.00)	\$ -	\$ -	
		Subtotal	\$	(39,417.74)			
Ticket Loss							
	Comp & In-Kind Tickets		\$	(5,000.00)	\$ -	\$ -	
		Subtotal	\$	(5,000.00)			
		TOTAL EXPENSE	\$	(198,260.50)	\$ -	\$ -	
		FINAL PROFIT	\$	689.50			

2024 BEAUFORT OYSTER FEST Actuals

Income						
Food & Beverage		\$	45,444.00			
Tides to Tables		\$	650.00			
F&B BAHA %		\$	37,013.00			
Vendor Entry Fees: Food			\$3,750			
5k Run entry		\$	5,228.00			
Cornhole Entry		\$	700.00			
Sponsorships		\$	15,000.00			Itemized
Hotel Sponsorship		\$	20,000.00			
A-Tax 2%		\$	18,250.00			
A-Tax County Local 3% & State 2%		\$	30,000.00			
TAG Grant		\$	-			
TOTAL INCOME			\$176,035	\$ -	\$ -	
EXPENSES						
Marketing and Promotional Fees		BUDGET	DEPOSIT	BALANCE	VENDOR	
Social Media		\$	(5,000.00)	\$ -	\$ -	
Influencers				\$ -	\$ -	
Billboards				\$ -	\$ -	
Radio		\$	(1,700.00)	\$ -	\$ -	
Media		\$	(7,415.99)	\$ -	\$ -	Newspaper
Television		\$	(5,420.00)	\$ -	\$ -	
Print				\$ -	\$ -	
Photography		\$	(2,500.00)	\$ -	\$ -	SK Signs Designs
Magazine		\$	-	\$ -	\$ -	
Subtotal		\$	(22,035.99)			
Print Goods						
Signage / Flyers		\$	(858.92)	\$ -	\$ -	Banners/Flyers/Signage
Tickets		\$	(1,007.94)	\$ -	\$ -	National Ticket - Budget Print
Subtotal		\$	(1,866.86)			
Service Providers						
Liability Insurance		\$	(1,154.00)	\$ -	\$ -	Lowcountry
Portalets		In Kind		\$ -	\$ -	Coastal Waste
Entertainment		\$	(9,049.00)	\$ -	\$ -	
Subtotal		\$	(10,203.00)			
Fees						
Venue / Public Works Fees (Water)		In Kind		\$ -	\$ -	
Event Rentals		\$	(13,072.80)	\$ -	\$ -	Amazing Events

	SLED Fee		\$ (25.00)	\$ -	\$ -	
	Administrative Fees		\$ (20,000.00)	\$ -	\$ -	
		Subtotal	\$ (33,097.80)			
Food & Beverage Fees						
	Waste Disposal		In Kind	\$ -	\$ -	roll carts/20
	Beverage Purchase		\$ (13,893.15)			Beer, wine, water, soda
	Oysters		\$ (6,900.00)			
	Ice		\$ (1,715.80)			
	Food Vendor Payout		\$ (45,444.00)	\$ -	\$ -	
		Subtotal	\$ (67,952.95)			
Misc Fees						
	EMS (Safety)		\$ (1,260.00)		\$ -	City of Beaufort
	Beaufort Police		\$ (3,809.40)			City of Beaufort
	Sherriffs Office 5k Run		\$ (250.00)			Sherriffs
	Coastal Security		\$ (700.00)			
	Ground Running 5K management		\$ (950.00)			
	Volunteer Supplies		\$ (417.26)			Snacks, Food, Hot Cocoa etc
	City Business License fee		\$ (200.00)			
	Cornhole Management & Tournament Prizes		\$ (700.00)			
	5K Run Prizes		\$ (450.00)			
	ALL SHIRTS 5k, Volunteer and Merch		\$ (8,139.49)			
	Medals		\$ (969.83)			
	Art 2024 Painting		\$ (750.00)	\$ -	\$ -	
	Parking Spots		\$ (882.00)			
	ABL - SLED		\$ (40.00)	\$ -	\$ -	
	Sound for Entertainment		(\$12,696)			
	Misc Supply		\$ (3,106.75)	\$ -	\$ -	Pans/Towels/Shucker, Condiments etc
		Subtotal	\$ (35,320.73)			
Ticket Loss						
	Comp & In-Kind Tickets		\$ (4,500.00)	\$ -	\$ -	
		Subtotal	\$ (4,500.00)			
	TOTAL EXPENSE		\$ (174,977.33)	\$ -	\$ -	
	FINAL PROFIT		\$ 1,057.67			

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Beaufort County Black Chamber of Commerce
2. Mailing Address: 711 Bladen Street City Beaufort State SC Postal Code 29902
3. Project Director: Jamie Fleming
- Project Treasurer or Administrative Official: Marilyn Harris
- Telephone #: _____ Email: _____
4. Event or Project Name: Gullah Roots: Mapping History, Connecting Communities

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

N/A

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

N/A

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

N/A

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 12/24 End – Month/Year 05/25

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

- Non-profit organization registered with the Secretary of South Carolina
- Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10
- Other Non-profit organization
- Government or governmental agency
- For-profit organization

7. Federal Employee Identification number (EIN): 04-3627371

8. Total Estimated Costs of the Proposed Event or Project: \$ _____

Accommodation Tax Funds Requested: \$ \$32,000

Project Funding from Other Sources: \$ _____

9. Source of Applicant's Other Funds: _____

Type text here

10. What is the anticipated total attendance for your event? N/A

Total "tourist" anticipated? N/A

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

Beaufort Regional Chamber of Commerce, Visit Beaufort, Port Royal & Sea Islands, Local Cultural and Historical Organizations, Airport Authorities

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: MARILYN HARRIS, Executive Director

Date: 10/10/2024

2024-25 ATAX REVENUE & EXPENSE BUDGET

Event/Project Projected Revenues	
Admission Receipts	
Private Donations	
City of Beaufort ATAX Request	\$32,000
Beaufort County TAX Request	
Hilton Head ATAX Request	
Town of Bluffton ATAX Request	
Other Area ATAC Request(s)	
Total Revenues	
Event/Project Projected Expenses	
Sales Promotional Expenses	1500
Publicity Materials Expense	2000
Newspaper Advertising	2500
Radio Expense	
Magazine Expense	1000
Television Expense	
Billboard Advertising	10,000
Printing	
Direct Mail Expenses	
Brochure Printing	
Flyer Printing	
Other Promotional Items	
Postage Supplies	
Equipment Rental	
Speaker Fees	
Entertainment Fees	
Hospitality Fees	
Decorations	
Refreshments	
Other Expenses (Detail Below)	15,000
Total Projected Revenues	
Event/Project Projected Profit or Loss	

Return to: **CITY OF BEAUFORT**
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I MARILYN HARRIS have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

MARILYN HARRIS Marilyn Harris 10/10/2024
Printed Name Signature Date

Roots Navigator App Description

The Roots Navigator app is an interactive mobile platform designed to guide users through the rich cultural and historical landscapes of Gullah heritage in Beaufort County and surrounding areas. This app offers a GPS-enabled map featuring significant Gullah historical sites, landmarks, and cultural points of interest. It also includes audio guides, providing historical context and storytelling to enhance the visitor experience.

With Roots Navigator, users can engage in immersive activities like scavenger hunts and interactive tours, allowing them to connect with others and deepen their understanding of the Gullah people's legacy. The app promotes both community engagement and cultural preservation, making it a valuable tool for education, tourism, and cultural exploration.

Key Features:

- GPS-enabled map: Detailed navigation to Gullah heritage sites.
- Audio guides: Cultural stories, historical narratives, and expert insights.
- Interactive activities: Scavenger hunts and user-to-user connection tools.
- Community engagement: Encourages interaction and a sense of belonging while exploring historical sites.

The app aims to foster a deeper appreciation of Gullah culture while contributing to local tourism and cultural preservation efforts.

A. Detailed Budget: Attached

B. Defined Budget:

Revenue:

- Tourism Grant (ATAX): \$32,000

Expenses:

1. App Development (Roots Navigator):
 - Estimated Cost: \$12,000 - \$15,000 (This covers the design, development, and testing of the app.)
2. Marketing and Promotions:
 - Design and Print Collateral: \$1,500
 - Promote on TripAdvisor: \$2,000 (This budget ensures visibility for tourists searching for activities and places in Beaufort.)
 - Newspaper and Magazine Ads: \$3,500
 - Billboard Ads (port authorities): \$10,000 (Reaching travelers arriving at this major gateway to the area.)

Total: \$32,000

C. Project Summary

The Roots Navigator is a mobile app designed to enhance the tourism experience in Beaufort County by offering an interactive guide to the region's rich cultural heritage and historical landmarks. Supported by the ATAX grant, the project includes development costs, strategic advertisements on billboards near or at major airports. The app will boost local tourism by offering visitors a digital tool for cultural exploration and navigation, promoting longer stays and increased engagement with local businesses and attractions.

D. Purpose

The Roots Navigator directly supports the Beaufort County Black Chamber of Commerce's (BCBCC) mission to empower local Black-owned businesses and promote cultural heritage through tourism. By highlighting the cultural and historical landmarks in a user-friendly app, the project can attract more visitors to the region, encouraging them to engage with local businesses. The primary beneficiaries are local Black-owned businesses, cultural organizations, and the entire Beaufort community, all of whom will experience increased visibility and economic opportunities as the app draws tourists seeking authentic cultural experiences in Beaufort County.

E. Tourism Impact

The Roots Navigator can significantly enhance tourism in Beaufort County by providing visitors with an engaging and interactive platform to explore the region's rich cultural heritage and historical landmarks. As an app that can be downloaded to one's cell phone, it will include an interactive accommodations directory that will encourage tourists to extend their stays and explore more locations, driving additional revenue to local businesses. Strategic advertising on platforms like TripAdvisor and airport billboards in Savannah and Charleston can help attract tourists from outside the region, specifically targeting those interested in cultural tourism.

It is estimated that 90% of the project's total expenditure will be directly related to tourism, as the app's primary purpose is to increase tourist engagement with local cultural and historical sites. This includes app development costs, marketing, and promotion aimed at drawing tourists from beyond a 50-mile radius. The increase in tourist activity will benefit local hotels, restaurants, shops, and other businesses that cater to visitors, further driving economic growth in the area.

F. Evaluation of the Project's Effectiveness

The Beaufort County Black Chamber of Commerce (BCBCC) will evaluate the effectiveness of the Roots Navigator Project through several key metrics:

1. **App Downloads and Usage:** The number of app downloads and user activity will be tracked to gauge the level of interest and engagement from tourists. This will provide insight into how effectively the app is being used as a tool for exploring local cultural and historical sites.
2. **Tourist Feedback and Surveys:** Surveys will be conducted within the app and at key tourist destinations to gather feedback from visitors on their experience. This will help assess the app's role in improving their understanding of the Gullah heritage and navigating Beaufort County.
3. **Impact on Local Businesses:** BCBCC will collaborate with local businesses to track any increase in tourist foot traffic and sales, particularly among Black-owned businesses. This will provide data on how well the project is promoting economic growth for the community.
4. **Increased Tourism Metrics:** Metrics such as increased hotel stays, restaurant visits, and other tourism-related activities in Beaufort County will be monitored, comparing pre- and post-launch data to measure the project's impact on overall tourism.
5. **Advertising Effectiveness:** The success of the advertising campaigns on TripAdvisor and billboards will be evaluated based on web traffic analytics, app downloads, and tourism statistics in the area, allowing BCBCC to adjust strategies if needed.

CITY OF BEAUFORT
ACCOMMODATON TAX GRANT APPLICATION

NAME OF APPLICANT: **Beaufort Film Society**

MAILING ADDRESS: **PO Box 998, Beaufort, SC 29901**

Project Director: **Ron Tucker**

Project Treasurer or Administrative Official: **Ron Tucker**

Tele: **843-986-4770** Email: beaufortfilm@gmail.com

Event of Project Name: **Beaufort International Film Festival 2025**

List below any Accommodations Tax funding you have previously been awarded from the City of Beaufort for this specific purpose: **BIFF 2019 (\$10K)**

List Accommodations Tax funding that you have received in the previous years for other events or projects: **None**

List any Accommodations Tax funds you have requested or received from other municipalities or counties for this proposed event or project:

Beaufort County ATax Amount requested: **\$60,000** (no funds have been received for FY 2025 as of this date)

X Non-profit organization registered with the Secretary of South Carolina

Federal Employee Identification number (EIN) **27-1020602**

Total Estimated Costs of the Proposed Event or Project: **\$230,000**

Accommodations Tax Funds Requested: **\$15,000**

Project Funding from Other Sources: **\$60,000 Bft County ATax (Requesting)**

Source of Applicant's Other Funds: **Sponsors and Fundraisers**

Total Attendance Anticipated: **13,000** Total "tourist" anticipated: **40%**

Coordinated Marketing Organization: **BFT/Port Royal CVB**

The Beaufort Film Society

The Beaufort Film Society (BFS) is a nonprofit, 501 (c) 3, member-supported organization, dedicated to providing the highest levels of entertainment and education to the public from all areas of the film industry. Through numerous special events, programs, and the Beaufort International Film Festival (BIFF), the BFS is committed to providing the community with a longstanding commitment to entertainment, outreach, and education through film.

Beaufort International Film Festival

The mission of BIFF is to enliven our community by fostering and developing a rich appreciation for the art of filmmaking. In 2007, festival attendance was around 500 and in 2020 the festival attendance was estimated at over 17,000 people enjoying some part of the six day festival. The 2021 Program was totally different in planning and execution. Due to COVID-19 and the necessity for establishing strict protocols for the health and safety of our patrons, we operated with less capacity and loss of sponsors and local patrons. BIFF 2024 was business as usual with around 13,000 people enjoying some part of our 6 day festival. More than 100 filmmakers from around the world were in attendance.

SCHEDULE OF EVENTS

February 18 Opening Night Reception

February 19 -22 : Screenings and Workshops (Screenings at the University of South Carolina, Beaufort Center for the Arts.

February 23: Awards Reception

Event Summary

The 19^h annual Beaufort International Film Festival will take place February 18 – 23, 2025. BIFF is produced annually by the Beaufort Film Society. The festival attracts filmmakers and film lovers from around the world. The festival is scheduled each year in mid- February since there are no competing events in Beaufort County and is also typically scheduled at a time when there is no Marine Corps Recruit Graduation Ceremony. The primary source of revenue is ATAX, ticket sales, entry fees, sponsorships and other fundraising events.

Budget/Profit/Loss Statements see attached

Tourism

In 2024 we completed a 100% tally of zip codes for attendees. Attendees included visitors from 37 states, and 9 countries.

Our data is compiled by collecting zip codes from every person attending the festival and by a 100% headcount of attendance at each screening. We call this our “butts in seats/heads in beds count”. A survey of our area sponsor hotels each year reveals occupancy increases during the time of the festival. This past year there was no Marine Graduation which means that most of the occupants were in Beaufort for the film festival.

We avoid most challenges and obstacles by careful planning of our event. We have over 150 volunteers who help us collect data, assist with greeting guests, and executing the set-up and logistics of this global event. Within a week after the wrap of the festival we gather our “Key Volunteer Leaders” to do an After-Action Report. We discuss what worked and what we can improve on.

The Beaufort International Film Festival is a community event and throughout the year the Beaufort Film Society engages with the area citizens by holding “meet & greets, fundraisers, and special events like our “Shorts at High Noon” series that is hosted by our community partner, the Technical College of the Lowcountry. This event takes place each Wednesday in September and continues through November. The event showcases films We consider this a ramp up for the next festival that takes place annually each February.

We have extensive Public Relations campaigns that we initiate usually beginning about four months out from the start of the festival. Our social media campaign is ongoing throughout the year.

Our budget for the film festival is carefully calculated each year based on past experiences and our goal of expanding the festival to reach more participation and increase visitors to Beaufort. We consider the film festival to be a tourism event and economic stimulator. Already we have 3 filmmakers from the past festival who are scouting locations for potential films and meeting with potential investors. These types of things don’t happen without the aggressive push by the festival staff to encourage filmmakers to attend to represent their films. All of our planned and sometimes unplanned expenditures are contributing to the overall goal drawing interest and visitation to the Lowcountry. It’s a “build it and they will come” approach. It’s working.

Note: The total estimated attendance in 2024 was 13,000 people (based on a 100% head count for each screening. This number reflects total attendance at the Opening Receptions, Screenings, Workshops, and the Awards Gala and Awards Ceremony.

I Ron Tucker have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

Printed Name

RON TUCKER

Signature

A handwritten signature in blue ink, appearing to read 'Ron Tucker', written over a horizontal line.

Date

Sep 13, 2024

2024/2025 ACCOMMODATION TAX GRANT APPLICATION – Budget

Organization: **Beaufort Film Society** Project Name: **Beaufort International Film Festival**

Revenue Projected

Beaufort Country ATAX	60000
Sponsors/BarterTrade	73000
Sponsors (Actual)	25000
Film Submission Fees	10000
Fundraising	4000
Ticket Sales	58000

Total Projected Income **230000**

Expenses Projected

Sponsor/BarterTrade	73000
Sponsor Tickets	25000
Advertising	7200
Social Media	
Regional Publications	
Regional Media/TV/Radio	
Videography Services	5000
Photography Services	4000
Marketing/PR/Management Services	31500
Facilities & Equipment	30000
Amazing Rentals	
Capital A (AV Service)	
JLK Lighting/Equipment	
Fancy Plants/Decoration	
Sound Engineer	
S&K Social Media Streaming	
Venue Rental (USCB)	12000
Insurance	2200
Postage/Shipping	500
Printing/Copying	4700
Processing Fees	4900
Subscriptions/Licensing	2000
Supplies	9000
Celebrity Travel	7500
Entertainment	1500
Marlena Smalls/Special Event	10000

Total Expenses **230000**

Event Profit/Loss **0**

Request for ATAX Grant **15,000**

BIFF

Profit Loss Detail

April 2023 through March 2024

Type	Date	Num	Name	Memo	Clr	Split	Amount
Ordinary Income/Expense							
Income							
Direct Public Support							
ATax Grant - County							
Deposit	3/31/2024			Deposit		BIFF	60,000.00
Total ATax Grant - County							60,000.00
Total Direct Public Support							60,000.00
Other Types of Income							
Barter/Trade							
Deposit	3/31/2024			In-Kind Spon...		BIFF	60,000.00
Total Barter/Trade							60,000.00
Total Other Types of Income							60,000.00
Program Income							
Film Submission Fees							
Deposit	3/31/2024			FilmFreeway ...		BIFF	10,978.00
Total Film Submission Fees							10,978.00
Fundraising							
Deposit	3/31/2024			BBB		BIFF	7,419.00
Deposit	3/31/2024			Wine Dinner ...		BIFF	1,500.00
Total Fundraising							8,919.00
Product Sales - TShirts, Totes							
Deposit	3/31/2024			Deposit		BIFF	1,819.00
Total Product Sales - TShirts, Totes							1,819.00
Sponsors							
Deposit	3/31/2024			Sponsors Act...		BIFF	34,500.00
Total Sponsors							34,500.00
Ticket Sales - Eventbrite							
Deposit	3/31/2024			BIFF 2024		BIFF	55,418.00
Deposit	3/31/2024			Pre-Sales 2024		BIFF	18,488.00
Total Ticket Sales - Eventbrite							73,906.00
Ticket Sales - Square							
Deposit	3/31/2024			Deposit		BIFF	145.00
Total Ticket Sales - Square							145.00
Total Program Income							130,267.00
Total Income							250,267.00
Expense							
Business Expenses							
Barter/Trade							
Check	3/31/2024			In-Kind Spon...		BIFF	60,000.00
Check	3/31/2024					BIFF	34,500.00
Total Barter/Trade							94,500.00
Total Business Expenses							94,500.00
Contract Services							
A/V Technical Support Director							
Check	3/31/2024		Capital A Productions			BIFF	829.08
Check	3/31/2024		Capital A Productions			BIFF	3,862.50
Check	3/31/2024		Wes Tinsley Pro Au...			BIFF	2,292.00
Total A/V Technical Support Director							6,983.58

BIFF
Profit Loss Detail
 April 2023 through March 2024

Type	Date	Num	Name	Memo	Clr	Split	Amount
Catering							
Check	3/31/2024		Lowcountry Produce			BIFF	60.00
Check	3/31/2024		Lowcountry Produce			BIFF	2,458.80
Check	3/31/2024		Lowcountry Produce			BIFF	5,358.14
Check	3/31/2024		Catering by Debbi ...			BIFF	2,625.00
Check	3/31/2024		Catering by Debbi ...	Gary Sinise ...		BIFF	688.00
Check	3/31/2024		USCB Catering/Ara...			BIFF	6,986.81
Total Catering							18,176.75
Decorative Lighting Services							
Check	3/31/2024		JLK Lighting Servies			BIFF	5,150.00
Total Decorative Lighting Services							5,150.00
Entertainment							
Check	3/31/2024		Marlena Smalls			BIFF	8,400.00
Check	3/31/2024		Liz Mandell	Opening Cer...		BIFF	750.00
Total Entertainment							9,150.00
Event Design/Management							
Check	3/31/2024		Ashley Rhodes Eve...			BIFF	2,250.00
Check	3/31/2024		Ashley Rhodes Eve...			BIFF	2,250.00
Check	3/31/2024		Ashley Rhodes Eve...			BIFF	332.20
Total Event Design/Management							4,832.20
Marketing/PR/ManagementServ.							
Advertising							
Constant Contact							
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	92.02
Check	3/31/2024		Constant Contact			BIFF	79.50
Check	3/31/2024		Constant Contact			BIFF	80.25
Check	3/31/2024		Constant Contact			BIFF	80.25
Total Constant Contact							1,344.24
IMDB Pro							
Check	3/31/2024		IMDB Pro			BIFF	160.41
Total IMDB Pro							160.41
Vimeo Pro							
Check	3/31/2024		Vimeo			BIFF	212.93
Check	3/31/2024		Vimeo			BIFF	212.93
Total Vimeo Pro							425.86
WIX- Website building fee							
Check	3/31/2024		WIX			BIFF	319.93
Check	3/31/2024		WIX			BIFF	319.93
Check	3/31/2024		WIX			BIFF	282.48
Total WIX- Website building fee							922.34
Advertising - Other							
Check	3/31/2024		Facebook Advertising			BIFF	84.97
Check	3/31/2024		Facebook Advertising			BIFF	14.00
Total Advertising - Other							98.97
Total Advertising							2,951.82

BIFF
Profit Loss Detail
April 2023 through March 2024

Type	Date	Num	Name	Memo	Clr	Split	Amount
Graphic Design							
Check	3/31/2024		Fiverr			BIFF	12.79
Check	3/31/2024		Fiverr			BIFF	18.33
Check	3/31/2024		Fiverr			BIFF	71.08
Check	3/31/2024		Fiverr			BIFF	13.05
Check	3/31/2024		Fiverr			BIFF	39.43
Check	3/31/2024		Fiverr			BIFF	55.25
Check	3/31/2024		Fiverr			BIFF	13.05
Check	3/31/2024		Fiverr			BIFF	79.13
Check	3/31/2024		Fiverr			BIFF	18.33
Total Graphic Design							320.44
Photography Services							
Check	3/31/2024		Susan Deloach Pho...			BIFF	3,000.00
Total Photography Services							3,000.00
Videography Services							
Check	3/31/2024		S K Designs			BIFF	500.00
Check	3/31/2024		Moonlight Productio...			BIFF	3,250.00
Total Videography Services							3,750.00
Marketing/PR/ManagementServ. - Other							
Check	3/31/2024		Google			BIFF	9.99
Check	3/31/2024		Drop Box			BIFF	128.27
Check	3/31/2024		EIN News			BIFF	399.00
Check	3/31/2024		Google			BIFF	21.39
Check	3/31/2024		Drop Box			BIFF	320.87
Check	3/31/2024		Bitly	QR Code		BIFF	119.98
Check	3/31/2024		QR Code			BIFF	59.00
Check	3/31/2024		QR Code			BIFF	59.00
Check	3/31/2024		QR Code			BIFF	59.00
Check	3/31/2024		QR Code			BIFF	58.00
Check	3/31/2024		QR Code			BIFF	59.00
Check	3/31/2024		Sandbar Media Group			BIFF	2,500.00
Check	3/31/2024		Sandbar Media Group			BIFF	9,500.00
Check	3/31/2024		Sandbar Media Group			BIFF	2,500.00
Check	3/31/2024		Sandbar Media Group			BIFF	3,000.00
Total Marketing/PR/ManagementServ. - Other							18,793.50
Total Marketing/PR/ManagementServ.							28,815.76
Outside Contract Services							
Check	3/31/2024		The Point Transport...	Gary Sinise T...		BIFF	445.00
Check	3/31/2024		JustUsLegal Service	Security Deta...		BIFF	700.00
Check	3/31/2024		Habitat for Humanity	Acrylic Logo ...		BIFF	452.00
Check	3/31/2024		Richard Kilgore	Cleaning Ser...		BIFF	750.00
Total Outside Contract Services							2,347.00
Total Contract Services							75,455.29
Facilities and Equipment							
Equip Rental and Maintenance							
Amazing Event Rentals							
Check	3/31/2024		Amazing Event Ren...			BIFF	6,808.80
Check	3/31/2024		Amazing Event Ren...			BIFF	10,286.67
Check	3/31/2024		Amazing Event Ren...			BIFF	391.15
Total Amazing Event Rentals							17,486.62
Fancy Plants							
Check	3/31/2024		Fancy Plants			BIFF	1,273.20
Total Fancy Plants							1,273.20
Total Equip Rental and Maintenance							18,759.82

BIFF
Profit Loss Detail
April 2023 through March 2024

Type	Date	Num	Name	Memo	Clr	Split	Amount
Rent, Parking, Utilities							
Venue - USCB CFA							
Check	3/31/2024		Center for the Arts			BIFF	10,000.00
			Total Venue - USCB CFA				10,000.00
			Total Rent, Parking, Utilities				10,000.00
Facilities and Equipment - Other							
Check	3/31/2024		DipJar			BIFF	149.00
Check	3/31/2024		DipJar			BIFF	149.00
			Total Facilities and Equipment - Other				298.00
			Total Facilities and Equipment				29,057.82
Operations							
Postage, Mailing Service							
Check	3/31/2024		USPS			BIFF	8.00
Check	3/31/2024		USPS			BIFF	10.12
Check	3/31/2024		USPS			BIFF	16.02
Check	3/31/2024		USPS			BIFF	15.30
Check	3/31/2024		USPS			BIFF	8.00
Check	3/31/2024		USPS			BIFF	10.12
Check	3/31/2024		USPS			BIFF	16.02
Check	3/31/2024		USPS			BIFF	248.00
Check	3/31/2024		USPS			BIFF	6.15
			Total Postage, Mailing Service				337.73
Printing and Copying							
Vista Print							
Check	3/31/2024		VistaPrint			BIFF	41.71
			Total Vista Print				41.71
			Total Printing and Copying				41.71
Processing Fees - Eventbrite							
Check	3/31/2024		Eventbrite	Pre-Sales		BIFF	958.00
Check	3/31/2024		Eventbrite	BIFF		BIFF	6,467.00
			Total Processing Fees - Eventbrite				7,425.00
Processing Fees - FilmFreeway							
Check	3/31/2024		FilmFreeway			BIFF	1,128.00
			Total Processing Fees - FilmFreeway				1,128.00
Processing Fees - PayPal							
Check	3/31/2024		PayPal			BIFF	139.03
			Total Processing Fees - PayPal				139.03
Processing Fees - Square							
Check	3/31/2024		Square			BIFF	316.00
			Total Processing Fees - Square				316.00
Subscriptions, Licensing							
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Carolina Film Alliance			BIFF	100.00
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95

BIFF Profit Loss Detail April 2023 through March 2024

Type	Date	Num	Name	Memo	Clr	Split	Amount
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Avangate			BIFF	59.99
Check	3/31/2024		Pond 5			BIFF	24.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Pond 5			BIFF	20.00
Check	3/31/2024		Pond 5			BIFF	20.00
Check	3/31/2024		Pond 5			BIFF	15.00
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Wondershare			BIFF	39.95
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Pond 5			BIFF	29.00
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	36.36
Check	3/31/2024		Network Solutions			BIFF	89.98
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Network Solutions			BIFF	89.98
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	115.75
Check	3/31/2024		Norton			BIFF	114.99
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Pond 5			BIFF	10.00
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Avangate			BIFF	44.99
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Check	3/31/2024		Network Solutions			BIFF	9.99
Check	3/31/2024		Wondershare			BIFF	9.95
Check	3/31/2024		Wondershare			BIFF	28.87
Check	3/31/2024		JotForm			BIFF	29.00
Check	3/31/2024		Microsoft			BIFF	9.99
Total Subscriptions, Licensing							1,606.11
Supplies							
Check	3/31/2024		Same Day Awards			BIFF	126.89
Check	3/31/2024		Discount Mugs	Logo Drinkwa...		BIFF	1,264.04
Check	3/31/2024		TJM Promotions			BIFF	670.00
Check	3/31/2024		Staples			BIFF	28.86
Check	3/31/2024		Staples			BIFF	21.39
Check	3/31/2024		Staples			BIFF	21.39
Check	3/31/2024		Staples			BIFF	21.38
Check	3/31/2024		Staples			BIFF	28.87
Check	3/31/2024		Fine Awards			BIFF	2,886.73

BIFF
Profit Loss Detail
April 2023 through March 2024

Type	Date	Num	Name	Memo	Clr	Split	Amount
Check	3/31/2024		Same Day Awards			BIFF	126.89
Check	3/31/2024		Skinny Lizard			BIFF	1,057.77
Total Supplies							6,254.21
Total Operations							17,247.79
Other Types of Expenses							
Insurance - Liability, D and O							
Check	3/31/2024		Johnson Johnson...			BIFF	2,387.12
Total Insurance - Liability, D and O							2,387.12
Other Costs							
Check	3/31/2024		Breakwater	Fundraising ...		BIFF	3,700.00
Total Other Costs							3,700.00
Total Other Types of Expenses							6,087.12
Travel and Meetings							
Conference, Convention, Meeting							
Check	3/31/2024		Lowcountry Produc...			BIFF	78.97
Total Conference, Convention, Meeting							78.97
Travel and Meetings - Other							
Check	3/31/2024		Hearth			BIFF	100.73
Check	3/31/2024		Wren			BIFF	64.50
Check	3/31/2024		11th St. Fish Camp			BIFF	140.89
Check	3/31/2024		Hearth			BIFF	70.15
Check	3/31/2024		Wren			BIFF	89.12
Check	3/31/2024		Saltus			BIFF	30.67
Check	3/31/2024		Wren			BIFF	54.69
Check	3/31/2024		Hearth			BIFF	68.12
Check	3/31/2024		Wren			BIFF	83.67
Check	3/31/2024		Beaufort Inn Filmm...	Gary Sinise a...		BIFF	3,801.00
Check	3/31/2024		Hearth			BIFF	197.20
Check	3/31/2024		Old Bull Tavern			BIFF	25.59
Check	3/31/2024		Old Bull Tavern			BIFF	300.00
Check	3/31/2024		Hearth			BIFF	100.73
Check	3/31/2024		Wren			BIFF	64.50
Check	3/31/2024		11th St. Fish Camp			BIFF	140.89
Check	3/31/2024		Hearth			BIFF	70.15
Check	3/31/2024		Wren			BIFF	89.12
Check	3/31/2024		Saltus			BIFF	30.65
Check	3/31/2024		11th St. Fish Camp			BIFF	73.05
Check	3/31/2024		Wren			BIFF	78.22
Check	3/31/2024		Wren			BIFF	69.94
Check	3/31/2024		Wren			BIFF	103.93
Check	3/31/2024		Wren			BIFF	97.57
Total Travel and Meetings - Other							5,945.08
Total Travel and Meetings							6,024.05
Total Expense							228,372.07
Net Ordinary Income							21,894.93
Net Income							21,894.93

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Accrual Basis

BIFF
Profit Loss Detail
April 2022 through March 2023

Type	Date	Num	Name	Memo	Clr	Split	Amount
Ordinary Income/Expense							
Income							
Direct Public Support							
ATax Grant - County							
Deposit	2/28/2023			Deposit		BIFF	30,000.00
Total ATax Grant - County							30,000.00
Total Direct Public Support							30,000.00
Other Types of Income							
Barter/Trade							
Deposit	2/28/2023			Deposit		BIFF	73,000.00
Total Barter/Trade							73,000.00
Total Other Types of Income							73,000.00
Program Income							
Film Submission Fees							
Deposit	2/28/2023			Entry Fee		BIFF	9,873.00
Total Film Submission Fees							9,873.00
Fundraising							
Deposit	2/28/2023			Breakwater B...		BIFF	6,693.00
Deposit	2/28/2023			Wine Dinner ...		BIFF	1,000.00
Total Fundraising							7,693.00
Sponsors							
Deposit	2/28/2023			Sponsors (M...		BIFF	27,750.00
Total Sponsors							27,750.00
Ticket Sales - Eventbrite							
Deposit	2/28/2023			Combined Bl...		BIFF	45,625.00
Total Ticket Sales - Eventbrite							45,625.00
Ticket Sales - Square							
Deposit	2/28/2023			Deposit		BIFF	12,097.00
Total Ticket Sales - Square							12,097.00
Ticket Sales -CVB.							
Deposit	2/28/2023			Deposit		BIFF	2,174.00
Total Ticket Sales -CVB.							2,174.00
Total Program Income							105,212.00
Total Income							208,212.00
Expense							
Business Expenses							
Barter/Trade							
Check	2/28/2023			In-Kind Spon...		BIFF	73,000.00
Total Barter/Trade							73,000.00
Total Business Expenses							73,000.00
Contract Services							
A/V Technical Support Director							
Check	1/14/2023		Capital A Productions	AV Service		BIFF	1,321.03
Check	2/28/2023		S K Designs	Facebook Int...		BIFF	300.00
Check	2/28/2023		Wes Tinsley Pro Au...	Sound desig...		BIFF	1,680.00
Check	2/28/2023		Capital A Productions	AV Service at...		BIFF	5,284.13
Total A/V Technical Support Director							8,585.16

BIFF
Profit Loss Detail
April 2022 through March 2023

Type	Date	Num	Name	Memo	Clr	Split	Amount
Catering							
Check	1/14/2023		Serg Catering	Deposit/ cate...		BIFF	4,500.00
Check	2/14/2023		Q on Bay	Closing Party...		BIFF	200.00
Check	2/28/2023		Catering by Debbi ...	Awards Cere...		BIFF	2,225.00
Check	2/28/2023		Serg Catering	Opening Cat...		BIFF	4,432.00
Total Catering							11,357.00
Decorative Lighting Services							
Check	2/28/2023		JLK Lighting Servies			BIFF	6,600.00
Total Decorative Lighting Services							6,600.00
Entertainment							
Check	2/14/2023		Liz Mandell	Opening Cer...		BIFF	700.00
Total Entertainment							700.00
Event Design/Management							
Check	11/4/2022		Ashley Rhodes Eve...	Event Planni...		BIFF	2,250.00
Check	1/14/2023		Ashley Rhodes Eve...	Event Planner		BIFF	2,250.00
Total Event Design/Management							4,500.00
Marketing/PR/ManagementServ.							
Advertising							
Constant Contact							
Check	2/28/2023		Constant Contact	Email market...		BIFF	552.00
Total Constant Contact							552.00
IMDB Pro							
Check	2/28/2023		IMDB Pro	Celebrity Ma...		BIFF	159.00
Total IMDB Pro							159.00
Vimeo Pro							
Check	2/28/2023		Vimeo	Streaming PL...		BIFF	231.00
Total Vimeo Pro							231.00
WIX- Website building fee							
Check	2/28/2023		WIX	Website host...		BIFF	317.00
Total WIX- Website building fee							317.00
Advertising - Other							
Check	1/14/2023		WHHI	Television Co...		BIFF	700.00
Total Advertising - Other							700.00
Total Advertising							1,959.00
Graphic Design							
Check	2/28/2023		Fiverr	Awards Grap...		BIFF	119.00
Total Graphic Design							119.00
Photography Services							
Check	2/28/2023		Susan Deloach Pho...			BIFF	3,000.00
Check	2/28/2023		Jennifer Philips Pho...			BIFF	500.00
Check	2/28/2023		Charlotte Berkeley ...			BIFF	500.00
Total Photography Services							4,000.00
Videography Services							
Check	2/28/2023		Moonlight Productio...			BIFF	3,250.00
Total Videography Services							3,250.00
Marketing/PR/ManagementServ. - Other							
Check	2/28/2023		EIN News	Press Releas...		BIFF	399.00
Check	2/28/2023		Drop Box	Film Transfer...		BIFF	335.00
Check	2/28/2023		QR Code	QR Code for ...		BIFF	118.00
Check	2/28/2023		Sandbar Media Group	Management...		BIFF	12,000.00
Total Marketing/PR/ManagementServ. - Other							12,852.00
Total Marketing/PR/ManagementServ.							22,180.00

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 11/03/23
 Accrual Basis

BIFF
Profit Loss Detail
 April 2022 through March 2023

Type	Date	Num	Name	Memo	Clr	Split	Amount
Outside Contract Services							
Check	2/14/2023		Richard Kilgore	USCB Cleani...		BIFF	700.00
Total Outside Contract Services							700.00
Total Contract Services							54,622.16
Facilities and Equipment							
Equip Rental and Maintenance							
Amazing Event Rentals							
Check	2/28/2023		Amazing Event Ren...	Lighting Servi...		BIFF	10,840.53
Total Amazing Event Rentals							10,840.53
Fancy Plants							
Check	2/14/2023		Fancy Plants	Decoration		BIFF	1,107.00
Total Fancy Plants							1,107.00
Total Equip Rental and Maintenance							11,947.53
Property Insurance							
Check	11/4/2022		Kinghorn Insurance			BIFF	630.27
Total Property Insurance							630.27
Rent, Parking, Utilities							
Venue - Tabby Place							
Check	11/4/2022		Beaufort Inn	Venue Rental		BIFF	2,159.00
Total Venue - Tabby Place							2,159.00
Venue - USCB CFA							
Check	2/28/2023		Center for the Arts	Wine Cups		BIFF	420.00
Check	2/28/2023		Center for the Arts	Venue Rental		BIFF	9,755.00
Total Venue - USCB CFA							10,175.00
Total Rent, Parking, Utilities							12,334.00
Facilities and Equipment - Other							
Check	2/28/2023		Table Cloth Factory	Table Cloth P...		BIFF	751.00
Check	2/28/2023		DipJar			BIFF	149.00
Total Facilities and Equipment - Other							900.00
Total Facilities and Equipment							25,811.80
Operations							
Postage, Mailing Service							
Check	2/28/2023		USPS			BIFF	508.00
Total Postage, Mailing Service							508.00
Printing and Copying							
Check	2/14/2023		Alpha Graphics			BIFF	106.27
Check	2/28/2023		Alpha Graphics	Film Guide		BIFF	2,888.77
Check	2/28/2023		Alpha Graphics			BIFF	44.29
Total Printing and Copying							3,039.33
Processing Fees - Eventbrite							
Check	2/28/2023		Eventbrite	BBB fees		BIFF	443.00
Check	2/28/2023		Eventbrite	BIFF Presales		BIFF	1,070.00
Check	2/28/2023		Eventbrite	BIFF Ticket ...		BIFF	1,790.00
Total Processing Fees - Eventbrite							3,303.00
Processing Fees - FilmFreeway							
Check	2/28/2023		FilmFreeway			BIFF	1,014.00
Total Processing Fees - FilmFreeway							1,014.00
Processing Fees - Square							
Check	2/28/2023		Square			BIFF	357.00
Total Processing Fees - Square							357.00

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11/03/23

Accrual Basis

BIFF
Profit Loss Detail
April 2022 through March 2023

Type	Date	Num	Name	Memo	Clr	Split	Amount
Subscriptions, Licensing							
Check	10/15/2022		SC Department of ...	BBB - License		BIFF	45.00
Check	2/28/2023		Microsoft	MS Office		BIFF	120.00
Check	2/28/2023		JotForm	Voting Mana...		BIFF	348.00
Check	2/28/2023		Wondershare	Editing Softw...		BIFF	120.00
Check	2/28/2023		Pond 5	Music licensing		BIFF	205.00
Check	2/28/2023		Norton	Virus Protecti...		BIFF	105.00
Check	2/28/2023		Sign Up Genius	Volunteer Sig...		BIFF	120.00
Check	2/28/2023		NetSolutions	Web Hosting		BIFF	437.00
Total Subscriptions, Licensing							1,500.00
Supplies							
Check	1/14/2023		Skinny Lizard	T-Shirts		BIFF	1,648.89
Check	2/28/2023		Fine Awards	Awards Trop...		BIFF	3,865.80
Check	2/28/2023		Skinny Lizard	T-shirts		BIFF	54.70
Check	2/28/2023		Walmart	Wine		BIFF	228.45
Check	2/28/2023		Walmart	Water		BIFF	13.92
Check	2/28/2023		Walmart	IPAD		BIFF	336.02
Check	2/28/2023		Walmart	Supplies		BIFF	610.00
Check	2/28/2023		Amazon	Lanyards/Misc		BIFF	922.00
Check	2/28/2023		Staples	Supplies		BIFF	664.00
Total Supplies							8,343.78
Total Operations							18,065.11
Other Types of Expenses							
Insurance - Liability, D and O							
Check	2/28/2023		Kinghorn Insurance	Mount Vernon		BIFF	2,387.12
Total Insurance - Liability, D and O							2,387.12
Other Costs							
Check	12/14/2022		Breakwater Restaur...	Reimburseab...		BIFF	3,000.00
Check	2/28/2023		Golden Ticket Chari...	Good Neighb...		BIFF	600.00
Check	2/28/2023		Golden Ticket Chari...	Breakwater B...		BIFF	600.00
Check	2/28/2023		Golden Ticket Chari...	Colleton Rive...		BIFF	600.00
Check	2/28/2023		Golden Ticket Chari...	Saltus Wine ...		BIFF	600.00
Total Other Costs							5,400.00
Total Other Types of Expenses							7,787.12
Travel and Meetings							
Travel							
Celebrity Travel							
Check	2/28/2023		AC Limo Service	Guests of Ho...		BIFF	701.00
Check	2/28/2023		Cars Mark	Rental Car fo...		BIFF	756.00
Check	2/28/2023		American Airlines	Airfare Bailey...		BIFF	2,764.00
Check	2/28/2023		Expedia	Travel Costs ...		BIFF	244.00
Total Celebrity Travel							4,465.00
Total Travel							4,465.00
Travel and Meetings - Other							
Check	2/28/2023		Miscellaneous Vend...	Meetings/Jur...		BIFF	2,178.00
Total Travel and Meetings - Other							2,178.00
Total Travel and Meetings							6,643.00
Total Expense							185,929.19
Net Ordinary Income							22,282.81
Net Income							22,282.81

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUN 08 2010

BEAUFORT FILM SOCIETY INC
C/O RONALD TUCKER
PO BOX 998
BEAUFORT, SC 29901

Employer Identification Number:
27-1020602
DLN:
17053110311010
Contact Person:
GARY MUTHERT ID# 31518
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
September 24, 2009
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

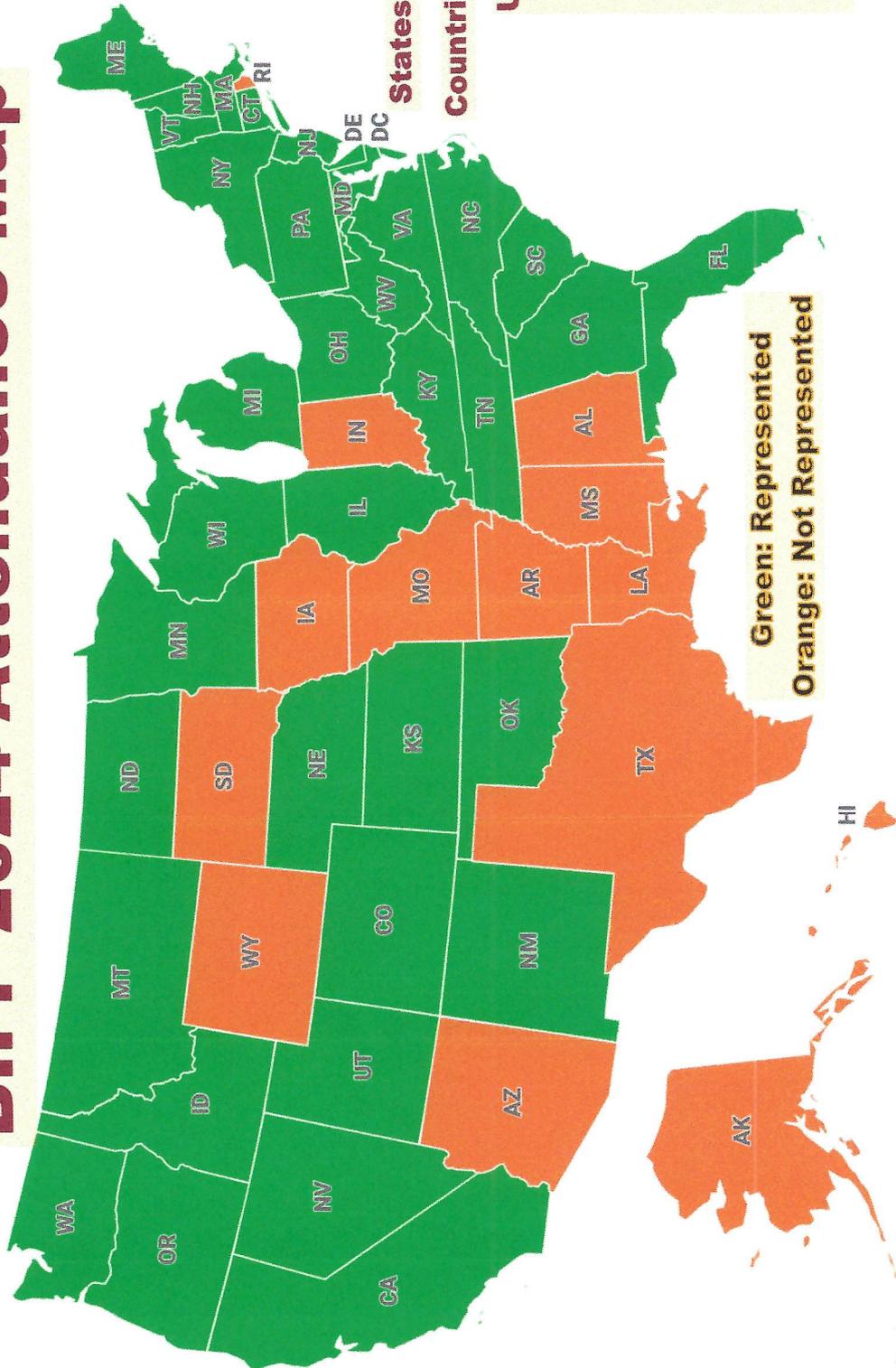
We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

BIFF 2024 Attendance Map



States Represented: 37

Countries Represented: 9

- United States
- Colombia
- Mongolia
- Germany
- Canada
- England
- St. Croix
- Poland
- Mexico

Green: Represented
Orange: Not Represented

4

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Beaufort Water Search and Rescue

2. Mailing Address: 817 Paris Avenue City Port Royal State SC Postal Code 29935

3. Project Director: Patrick Canning

Project Treasurer or Administrative Official: Joseph Brunn

Telephone #: 484-764-5570 Email: patrick.canning@bwsar.org

4. Event or Project Name: Water rescue services and Water Festival event safety patrol

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

None

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

None

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

None

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 1/25 End – Month/Year 12/25

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

Non-profit organization registered with the Secretary of South Carolina

Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10

Other Non-profit organization

Government or governmental agency

For-profit organization

7. Federal Employee Identification number (EIN): 57-1126299

8. Total Estimated Costs of the Proposed Event or Project: \$ 45,000

Accommodation Tax Funds Requested: \$ 20,000

Project Funding from Other Sources: \$ 25,000

9. Source of Applicant's Other Funds: fundraising/donations

10. What is the anticipated total attendance for your event? 25,000

Total "tourist" anticipated? 3,750

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration: Beaufort Water Search And Rescue has no defined budget for marketing as we are the countywide 911 water emergency first responders. See attached list of organizations we work with.

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**). See attachment.

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

Funds will be used to add an additional asset to our service fleet and continue our support of waterfront activities.

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words. See attachment

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit. Our water safety and rescue services provide immeasurable benefits to the community at large.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism. 15% boating traffic, 30% downtown water related activities requiring water patrol.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?
GIS data as provided by CVB/DMO of Beaufort.

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: Patrick Canning

Date: 9/13/2024

2024-25 ATAX REVENUE & EXPENSE BUDGET

<u>Event/Project Projected Revenues</u>	See attached statement
Admission Receipts	
Private Donations	
City of Beaufort ATAX Request	
Beaufort County TAX Request	
Hilton Head ATAX Request	
Town of Bluffton ATAX Request	
Other Area ATAC Request(s)	
Total Revenues	
<u>Event/Project Projected Expenses</u>	See attached statement
Sales Promotional Expenses	
Publicity Materials Expense	
Newspaper Advertising	
Radio Expense	
Magazine Expense	
Television Expense	
Billboard Advertising	
Printing	
Direct Mail Expenses	
Brochure Printing	
Flyer Printing	
Other Promotional Items	
Postage Supplies	
Equipment Rental	
Speaker Fees	
Entertainment Fees	
Hospitality Fees	
Decorations	
Refreshments	
Other Expenses (Detail Below)	
Total Projected Revenues	
Event/Project Projected Profit or Loss	

Return to: **CITY OF BEAUFORT**
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Patrick Canning have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

<u>Patrick Canning</u>		<u>9/13/2024</u>
Printed Name	Signature	Date

Beaufort Water Search and Rescue

Serving Beaufort County Since 1975



2024

As a part of our primary mission and objectives, we conduct on-water search, rescue and recovery operations within the Beaufort County area. Our coverage area includes Port Royal, St Helena, Caliboque sounds, adjacent major and minor waterways, wetlands and marshlands. Also included are the immediate offshore waters and inland rivers. Our efforts are conducted under the direction of the Beaufort County Emergency Management office in conjunction with federal, state, local emergency response and law enforcement within our area of operations.

US Coast Guard (Tybee & Sector Charleston)
SC Department of Natural Resources / Marine Patrol
Beaufort City Police
Beaufort County Sheriff – Marine Division
Beaufort/Port Royal Fire Department
Burton Fire / Rescue
Beaufort County Office of Emergency Management
MCAS Search & Rescue / Homeland Defense (NCIS USMCAS BEAUFORT)
Parris Island Fire Rescue / Homeland Defense (NCIS USMCRD PISC)
Town of Port Royal Police Department

To act under the direction of the Beaufort County Emergency Management office in the aftermath of a disaster (hurricane landfall, in-water plane crash, cruise ship sinking).

To provide a community service oriented, all-volunteer force, with experience, equipment, expertise and an intimate knowledge of the local waterways dedicated to the protection of lives and property of the citizens and visitors of Beaufort County, South Carolina.

During the previous 12 months our volunteers had responded to 59 rescue missions in our local waterways totaling 496 man hours.

Additionally we serve the community by providing special event support in the form of river patrols during;

4th of July fireworks at the Sands
Beaufort Water Festival for 10 days
In charge of the river closure for the water festival air show
Low Country Boil kayak race in Hilton Head
Beaufort boat parade of lights
Hilton Head boat parade of lights
Dataw boat parade of lights
New Year's Eve fireworks downtown Beaufort
Beaufort River Swim
Dragon Boat races
Paddle Battle Biathlon
Hunting Island Paddlefest
Bluffton 4th of July fireworks

BWSAR is an all-volunteer, water search and rescue organization whose primary mission is to support and assist local, state and federal emergency response agencies in times of need. It has taken years of commitment and hard work by many squad members to build an unprecedented relationship of trust and professional respect with these agencies. Much of BWSAR's support and funding depends on the continued recognition by local and state agencies of this high level of commitment, competence and dedication.

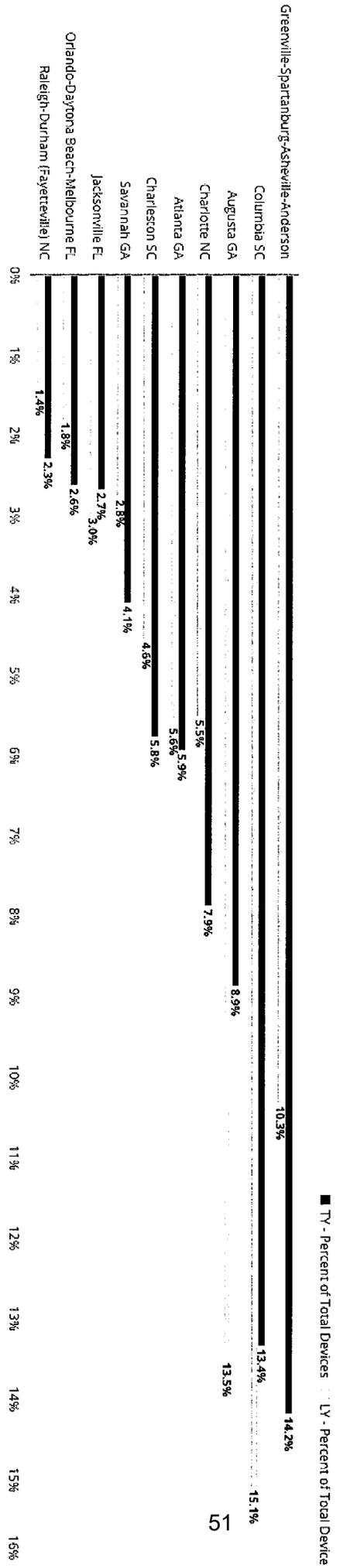
According to South Carolina Code of Laws Title 6 Chapter 4 Allocation of Accommodations Tax Revenues.

Section 6-4-10; (4), (b) "Tourism-related expenditures" include:

(iii) construction, maintenance and operation of facilities for civic and cultural activities.

We feel that under the guidelines of this statute we support the community from a tourism and safety standpoint and kindly ask for your consideration in funding our efforts.

Top Origin Markets & Change Compared to the Previous Year



CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Freedman Arts District
2. Mailing Address: 2015 Boundary Street, Suite 317 City Beaufort State SC Postal Code 29902
3. Project Director: Linda Silk Sviland
- Project Treasurer or Administrative Official: Bill Quarles
- Telephone #: 678-632-8656 Email: billq.auroraconsulting@gmail.com
4. Event or Project Name: The "Chalk it Up!" festival presented by the Freedman Arts District

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

The "Chalk it Up!" Festival received ATAX funding in the 2024 Fiscal year

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

None

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

The "Chalk it Up" Festival received ATAX funding from Beaufort County in the 2024 Fiscal Year

5. Dates you will begin and complete work on your event or project: Begin – Month/Year Jan 2025 End – Month/Year April 2025

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

Non-profit organization registered with the Secretary of South Carolina

Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10

Other Non-profit organization

Government or governmental agency

For-profit organization

7. Federal Employee Identification number (EIN): 88-2601196

8. Total Estimated Costs of the Proposed Event or Project: \$ 72,409

Accommodation Tax Funds Requested: \$ 20,000

Project Funding from Other Sources: \$ 80,000

9. Source of Applicant's Other Funds: County of Beaufort, Plus private donations

10. What is the anticipated total attendance for your event? 7,000-10,000

Total "tourist" anticipated? 5,000

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

We will work with CVB, WSAVB, CW, METV, Island Packet, Beaufort Gazette, Post and Courier, Savannah Morning News, Lowcountry Weekly, and The Bluffton Sun. We will collaborate with CVB by working collectively on marketing and advertising for the event. We will also coordinate with USCB to market to the student population.

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: Linda Silk Sviland

Date: 9/13/2024

2024-25 ATAX REVENUE & EXPENSE BUDGET

Event/Project Projected Revenues	
Admission Receipts	\$0.00
Private Donations	\$30,000
City of Beaufort ATAX Request	\$20,000
Beaufort County TAX Request	\$50,000
Hilton Head ATAX Request	\$0.00
Town of Bluffton ATAX Request	\$0.00
Other Area ATAC Request(s)	\$0.00
Total Revenues	\$100,000
Event/Project Projected Expenses	
Sales Promotional Expenses	\$1967.00
Publicity Materials Expense	\$1517.00
Newspaper Advertising	\$5,197.00
Radio Expense	\$3,000.00
Magazine Expense	
Television Expense	\$8,000.00
Billboard Advertising	
Printing	\$2,213.00
Direct Mail Expenses	
Brochure Printing	\$50.00
Flyer Printing	\$250.00
Other Promotional Items	\$1,750.00
Postage Supplies	
Equipment Rental	\$4,250.00
Speaker Fees	\$28,000.00
Entertainment Fees	\$1,500.00
Hospitality Fees	\$2,000.00
Decorations	
Refreshments	\$100.00
Other Expenses (Detail Below)	\$12,675.00
Total Projected Expenses	\$72,409.00
Event/Project Projected Profit or Loss	\$27,591.00 Surplus

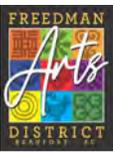
Return to: **CITY OF BEAUFORT**
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Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

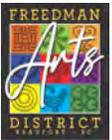
Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Linda Silk Sviland have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

<u>Linda Silk Sviland</u>	<u><i>Linda Silk Sviland</i></u>	<u>9/13/2024</u>
Printed Name	Signature	Date



FREEDMAN ARTS DISTRICT 2024 CITY OF BEAUFORT ATAX GRANT APPLICATION



Executive Summary:

The Freedman Arts District, a 501(c)(3) non-profit is requesting **\$20,000** to support and **expand** the regional promotion of our annual Chalk it Up Festival that is free and open to the public. The Festival is patterned after Italian festivals that originated in the 16th century and continue today. Our festival will kick off with an opening night celebration on the 28th and all day activities on March 29th and 30th and will include professional and amateur artists.

"Chalk it Up!" is performance art where the process of creating the work is as important as the finished piece. Dialogue between artists and visitors invites people to return over and over to see the pieces take shape during the festival. Art lovers view all stages of the creation from layout and design, to applying colors, to the finished pieces. Visitors often call friends and invite them to come join the fun.

Chalk it Up! will host 40 professional chalk artists from around the country, and an additional 20 local artists and youth art class teams under the guidance of their teacher from area middle and high schools. The inaugural 2024 Chalk It Up festival was such a success that all of the participating artists expressed interest in returning, including Lisa Gaither, Raleigh, NC; Beth Cox Stephens, Charlotte, NC; Mary Ward, Lenoir City, TN; Brittany Williams, Buford, GA; Eric Greenawalt, Pittsburgh, PA and Chelsey Scott, Atlanta, GA. As most are members of professional chalk artist guilds in Georgia and Florida, their work can be seen on line. These artists have an established fan base that will generate out-of-region visitors to our festival.

The free event will be accompanied by seasoned artisans demonstrating basket-weaving, woodturning, glass and ironworks; all-day live music performed by local musicians, a planned children's creative zone, food trucks, and a celebratory awards ceremony open to the public. A Freedman Arts District tour highlighting the cultural and historic significance of the District and opportunities for artists and art lovers will be offered.

The Freedman Arts District's "Chalk it Up!" festival will be a catalyst to attract visitors including repeat visitors after they learn of our rich and improving Arts District.

"Chalk it Up!" revenue will come from sponsorships by local businesses in the form of donations and sponsoring of individual chalk art illustrations ranging in sizes from large 10' by 10' to small 4' by 4'. These sponsorships are expected to produce \$30,000. Artists will spend 17 hours over both days of the event creating chalk art that is accompanied by signage promoting the sponsoring business.

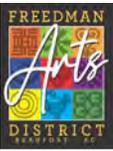
A. "Chalk It Up!" Detailed Project Budget (see page 8)

Revenue:

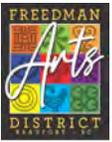
Revenue is generated exclusively from the sponsorship of chalk art squares. Approximately **\$30,000** may be raised through sponsorships or in-kind donations from local and regional businesses and institutions to cover operating expenses (including marketing and PR, and artist stipends) and to pay for promotional materials such as T-Shirts, Awards Ceremony Event and Final Artists Awards. With the an opening night celebration on Friday the 28th we have added a third day to the festival to encourage longer hotel stays.

TOTAL ESTIMATED REVENUE: \$30,000.00

TOTAL ESTIMATED EXPENSES: \$72,409.00



FREEDMAN ARTS DISTRICT 2024 CITY OF BEAUFORT ATAX GRANT APPLICATION



B. ATAX Request:

The Freedman Arts District will launch a Sponsorship Campaign this Fall with the goal of raising \$30,000 in cash or in-kind donations before the “Chalk it Up!” event March 28th -30th 2025. The Freedman Arts District will cover all expenses until sponsorships are solidified.

Our marketing program has been developed in consultation with the Convention and Visitor Bureau and the Hospitality Association. As you will see below, we will begin awareness events in October and November 2024 and build marketing expenditures in the weeks before the event. We are seeking **\$20,000** in City ATAX funds to assist in funding the costs for the marketing program. A copy of the budget is below, including the defined budget for the costs for which we are seeking the ATAX funding.

PROMOTION AND MARKETING

Radio:

- 1. Four Weeks prior to event:
 - 200 - 30 second commercials on WSAV, WTOC
 - Total Cost: **\$3,000**

Print:

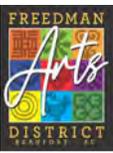
- 1. Print ads in Island Packet/Beaufort Gazette **\$1,247**
- 2. Ads in Courier & Post - HH, Charleston, Columbia **\$2,631**
- 3. Lowcounty Weekly/Island News **\$1,319**
- Total Print Costs: **\$5,197**

Talk with interested parties about allowing Chalk It Up! Marketing to be played or printed along with compatible digital, radio, or print buys is already in place.

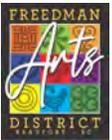
Artist Installation: We will have an artist create a piece in a prominent space in downtown Beaufort. In addition to the coverage and social media exposure of the process, the piece will be mounted on a movable display platform and relocated around the District and business corridors prior to the festival. This will be accompanied by Artist interviews and articles. **\$400**

CVB/Social Media:

- 1. Create and execute digital creative for all platforms (Mobile, Tablet, Desktop) with 500,000 to 1,000,000 digital impressions delivered to targeted adults in Atlanta, Charleston, Charlotte, Greenville, Hilton Head, Savannah and Beaufort County. **\$1,200**
- 2. Google Ads: **3,650**
- 3. Facebook weekly in major target areas (Charleston to Savannah) for 4 weeks leading up to event. **\$2,400**
- 4. Cost of graphic design at \$150 and hour for 5 hours: **\$750**
- Total Cost: **\$8,000**



FREEDMAN ARTS DISTRICT 2024 CITY OF BEAUFORT ATAX GRANT APPLICATION



Local Signage and Materials:

- | | |
|---|----------------|
| 1. Banner at Bay and Ribaut - \$435 plus fee \$50. | \$485 |
| 2. Flyers | \$250 |
| 3. Posters & Signage for display in retail windows, public libraries, municipal Building, USCB. | \$948 |
| 4. Design for all of the above | \$1,517 |
| 5. Sign at the bottom of the Woods Bridge Total | \$150 |
| Cost: | \$3,350 |

Selected Start Up Material Costs:

- | | |
|--|-----------------|
| 1. Equipment Rental (Stage, tents, porta johns, generator, chairs, tables) | \$5,065 |
| 2. Artist Chalk and set up supplies | \$3,460 |
| 3. Permits/Security | \$3,250 |
| Total Selected Start Up Material Costs: | \$11,775 |

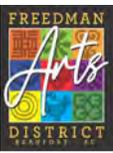
Total Promotion, Marketing, and Start Up Material Costs: \$31,722 (Total Budget and Grant Budget in Appendix D)

C. Brief Summary

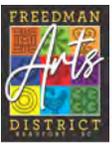
The Freedman Arts District’s, “Chalk it Up!” three-day Chalk Art Festival will host approximately 60 professional and amateur artists transforming a parking lot into colorful pavement museums. The festival will highlight local artists, attract regional and national chalk artists, and increase art tourism. Patterned after 16th century Italian festivals and accompanied by local music, a children’s corner, and District tour, the free public event concludes with a celebratory awards ceremony. The festival will expand Beaufort’s reputation for cultural enjoyment and arts education and showcase our housing restoration efforts which assist long-term Beaufort families in building generational wealth.

D. Event's Relation to Freedman Arts District and Community Stake Holders

The mission of the Freedman Arts District is to promote and encourage artists and artistic endeavors within its boundaries. (Appendix A). This effort includes supporting art events with focused social media, targeted outreach, and partnerships with other organizations. Our vision is to assist in the continued promotion of a thriving arts district rich in arts, cultural experiences, and opportunities; support appropriate economic revitalization; and expand arts education, enrollment, and programming. The mission and vision of the “Chalk it Up!” festival directly relate to the mission of the organization. Our Friday evening events will feature speakers and presentations on the arts in Beaufort's County and the significance of the Freedman Cottages in the context of Beaufort's history. The “Chalk it Up!” festival mission is to teach and inspire the artistic processes, promote Beaufort’s historic cottages and culture, and highlight businesses and partners that enrich the arts community. The vision is to provide an annual event that celebrates the artistic process while drawing the community together. The Freedman Arts District’s active Board of Directors, Advisory Board and staff (Executive and Marketing Director) (Appendix B) and proposed “Chalk Arts Festival Team” (Appendix C) are individuals skilled in the areas of Arts, Business, Marketing, Hospitality, Promotion, Non-Profit Administration and Event Management. In addition to this group, the “Chalk It Up!” Chalk Art Festival is supported by the Beaufort CVB, Beaufort Area Hospitality Association, Beaufort Arts Council, Gullah Geechee Heritage Corridor and USCB. Since receiving official 501(c)(3) status in May of 2022, the Freedman Arts District has hosted two Art Studio Tours in 2023, collaborated with the Gullah Geechee Heritage Corridor and the Beaufort Arts Council on the “Arts in the Arsenal” Program (June - August 2023), held a Bike Rack Design Competition, and initiated Beaufort's participation in the nationwide celebration of "Artists Sunday". Freedman Arts District also hosted a successful "Chalk it Up!" Festival in March 2024 and is currently planning a second "Artist Sunday" in December 2024. In addition, we have multiple homes under renovation in the Freedman Arts District. One of the Freedman Arts District Board of Directors was instrumental in producing a successful Chalk Arts Festival in November 2001 held at the Beaufort Shopping Plaza on Boundary Street.



FREEDMAN ARTS DISTRICT 2024 CITY OF BEAUFORT ATAX GRANT APPLICATION



Beneficiaries of the “Chalk It Up!” festival include artists, arts organizations, galleries, and education institutions within Beaufort. The event will bring greater economic impact to Beaufort in the form of local and visitor expenditures. Art lovers and enthusiasts can have more discretionary income to spend on tourist related activities. Additional beneficiaries of the festival include restaurants, hotels, merchants, event sponsors and partners. This event fits into the DMO sub-brands of “Arts,” “Events and Festivals,” and “History and Culture”.

E. Expected Impact on Tourism

We project 10,000+ attendees during the three-day session. This is a conservative number based on other chalk festivals in the nation; attendance has grown from 2,000 to 80,000 within the span of ten years at a chalk festival in Georgia and their organizer is advising us. Going into the second year, there is now more awareness of the Chalk festival and how people of all ages can participate--and even be involved in the award selection by voting for their favorite chalk art. With our new-found partnership with Post and Courier, we expect a more robust marketing effort to attract visitors from Columbia, Charleston, Augusta, and Savannah. The festival will attract people that might not otherwise come to Beaufort County because it offers a unique, creative experience. The emerging and changing experience as the artwork takes shape invites tourists to come often and to come earlier. Restaurants revenues will also benefit because the chalk event will be located downtown.

We are working with the CVB to conduct on-site tracking to determine where tourists are originating. This information will be collected through individual interviews on-site during the festival. We are partnering with the CVB and the Hospitality Association to leverage marketing. We will be seeking to partner with other organizations including: The Gullah Geechee Heritage Corridor, USCB, The Chamber of Commerce, The Beaufort County Black Chamber of Commerce, The Cultural Arts District, The Beaufort County Arts Council, The Beaufort Arts Association, and all the schools in the county. We will expend funds beginning in December 2024 through March 2025.

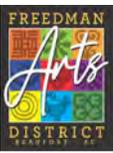
F. Project Evaluation

Based on other Chalk Art festivals (including a 12-year successful program in Fredericksburg/Stafford Virginia, and 12-year festival in Marietta Georgia), our Beaufort CVB estimates an attendance of 12,000-15,000 individuals with tourists comprising 30% (beyond 50 miles). We expect the non-direct benefits of the festival will enhance recognition of Beaufort as an active arts center and contribute to Beaufort becoming a top Arts Small Town. As this happens, more students will consider USCB as a school choice thereby increasing student and parent visitation to Beaufort. We will work with the CVB to measure the effectiveness of the festival based on zip code collections at the festival, short term rental data, CVB visitor spending impact, and geo location data.

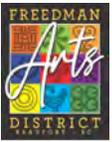
APPENDIX A

LOCATION OF THE FREEDMAN ARTS DISTRICT





FREEDMAN ARTS DISTRICT 2024 CITY OF BEAUFORT ATAX GRANT APPLICATION



APPENDIX B

FREEDMAN ARTS DISTRICT INC.

Organization ID #88-2601196

<http://FreedmanArtsDistrict.org>

PO Box 987

Beaufort, SC 29901

BOARD OF DIRECTORS

Bill Quarles - Chief Financial Officer Owner, Aurora Business Consulting, LLC

Emily Durso - Retired expert in Economic Development, Marketing, Consulting, Business Management and Higher Education

Amiri Farris - Multi-disciplinary contemporary artist whose work has been featured in more than 100 exhibitions internationally

Ashlee Houck - President and CEO, Beaufort Area Hospitality Association

Valinda Littlefield, Ph.D. - Director of the Institute for the Study of the Reconstruction Era

Megan Morris - Vice President, Beaufort Regional Chamber of Commerce

Linda Silk Sviland – Artist, NWQ Resident, Owner of Wink Ventures, LLC, 40 years' experience in graphic design and advertising, former Arts Board President for multiple Arts Organizations

Victoria Smalls - Executive Director, Gullah Geechee Cultural Heritage Corridor

Dick Stewart - Lifetime Entrepreneur

Robb Wells - President & CEO, Greater Beaufort Port Royal Convention and Visitors Bureau

ADVISORY BOARD

Dan Blackmon – President of the NWQ Neighborhood Association

Amanda Dickman – Director of the Beaufort County Library

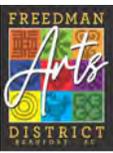
Bonnie Hargrove – Director of the USCB Center for the Arts

Kelly Mitchell – Volunteer Advocate

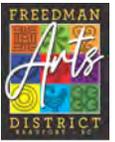
Peggy Simmer – Secretary of the Old Commons Neighborhood Association

STAFF

Cherimie Crane Weatherford- Executive Director



FREEDMAN ARTS DISTRICT 2024 CITY OF BEAUFORT ATAX GRANT APPLICATION



APPENDIX C

“Chalk It Up!” Chalk Art Festival Team and Positions

Linda and Marc Sviland, Stella Scott, Kelly Mitchell, Peggy Simmer, Rita and Barry Wilson, Lisa Clancy, Other Freedman Arts District Board and Advisory Board Members *

General Chair, who is responsible for making sure the other committee members perform their tasks according to the plan, making Major Sponsor presentations, and being the spokesperson. Responsible for placing the press releases, arranging pre-event feature stories and setting up day-of-event coverage. Also responsible for securing artisans for live demonstrations during the festival.

Operations Chair, who is responsible for the nitty-gritty such as getting permits, laying out the site, renting tents, port-a-johns, arranging for trash pick-up, and the like.

Artist Chair, who is responsible for recruiting the 60 plus chalk artists who will create the chalk paintings over the two days in 4x4, 6x6, 8x8 squares.

Sales Chair, who is responsible for recruiting a half-dozen or more other people who will sell sponsorship of the squares.

Co-Volunteer Chairs, who are responsible for recruiting 80+ volunteers who will help just before and during the event.

Marketing/Social Media Chair, who is responsible for setting up the website and making frequent posts.

School Liaison Chair, who is responsible for coordinating with art faculty at all schools within Beaufort County.

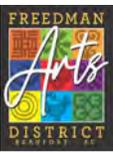
Children Activity Chair, who is responsible for creating and overseeing activities at the Kids Zone during the festival.

Merchandise & Collateral Chairs, who are responsible for determining what merchandise (t-shirts, mouse pads, etc) will be sold, and for ordering and pricing it, and for arranging musicians and food & drink vendors for the event.

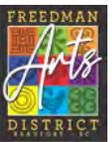
ARTIST & VOLUNTEER GOAL:

40 visiting professional chalk artists, 20 local/regional participants, and 3-5 area school art class teams plus 5-6 craft/artisans demonstrating: woodturning, pottery, basketweaving, glassblowing, metal forging 90 volunteers (set-up and day of)

*More team members will be added



FREEDMAN ARTS DISTRICT 2024 CITY OF BEAUFORT ATAX GRANT APPLICATION



APPENDIX D

Total Budget and Requested Grant Budget

Revenue	Amount	Grant Expense
Event/Project Revenue	Atax Requests 50k+ 20k	
Projected Admissions Receipts	\$0 (this is a free public event)	
Private Donations	\$30,000 (cash or in kind)	
Total Revenues	\$100,000	
Expenses		Grant Expense
Sales Promotions Expenses	\$1,967	\$1,967
Publicity Materials Expense	\$1517	\$1517
Newspaper Advertising	\$5,197 (Post&Courier, Island Packet etc.)	\$5,197
Radio Advertising	\$3,000	\$3,000
Magazine Advertising	\$0	
Television Advertising	\$8,000	\$8,000
Billboard Advertising	\$0	
Printing	\$2,213	\$2,213
Direct Mail Expenses	\$0.00	
Brochure Printing	\$50	\$50
Flyer Printing	\$250	\$250
Other Promotional Items	\$1,750	\$1,750
Postage Supplies	\$0.00	
Equipment Rental	\$4,250 (tents, porta johns, chairs, tables, power)	\$4,250
Service Rental	\$815	\$815
Entertainment Fees	\$1,500 (musicians)	\$1,500
Speaker Fees	\$28,000 (professional chalk artists)	\$28,000
Hospitality Fees	\$2,000	\$2,000
Decorations	\$0	
Refreshments	\$100	\$100
Other Expenses		
Artist chalk	\$900	\$900
Set-up supplies for chalk art sites	\$1,360	\$1,360
Awards Ceremony	\$6,290	\$6,290
Permits	\$50	\$50
Police/Security	\$3,200	\$3,200
Total Expenses	\$72,409	\$72,409
Profit Loss	\$ 27,591	\$27,591

Freedman Arts District, LLC
2024 Chalk Art Festival
Cash Inflows and Outflows

Grants
Donations from Sponsors
Total Revenues

Banners
Posters
Newspaper Advertising:
 Post & Courier
 Island News
 Low Country Weekly
 Island Packet
Radio & Billboard Advertising - CVB
Vinyl Labels
Sponsor Signs
Barricade Signs
Amiri Poster
Tee Shirts
Feather Flags
Banners for Tents
Equipment Rental:
 Tents/Tables/Chairs/Stage
 Portajohns/Washstations
 Generator -- gasoline
Entertainment Fees:
 Ashly Holland
 Walker Dean
 Edward and Ryan
 Deck Hands Band
Professional Artist Fee
Artist Stipends
Hospitality Fees:
 Lisa
 Eric
 Chelsea
Balloons for Awards Ceremony
Water for Artists
Artists Chalk

Other Artist Supplies
Awards Ceremony:
Prize Money
Venue
Caterer
Signage
Invitation
Kids Tent
City Banner Permit
Police Presence
Insurance
Website and Social Media Support

Total Expenses

Net Funds Raised

47,775.00
3,087.50

50,862.50

435.62
96.72

3,550.00
1,016.00
302.50
127.50
13,030.00
353.53
452.81
256.48
472.24
1,550.00
684.00
231.28

3,441.88
735.00
64.18

200.00
200.00
400.00
600.00
3,000.00
1,791.00

536.84
600.00
758.69
38.52
50.00
2,427.40

499.37

1,000.00

1,600.00

2,400.00

61.50

51.10

200.00

50.00

3,906.00

1,012.00

3,600.00

51,782.16

(919.66)

6

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Friends of Hunting Island State Park, Inc.
2. Mailing Address: 149 Collin Campbell City Beaufort State SC Postal Code 29906
3. Project Director: Linda Miller, President
- Project Treasurer or Administrative Official: Ted Temple, Treasurer
- Telephone #: 203-450-5927 Email: FOHlorg@gmail.com
4. Event or Project Name: Hunting Island's Mobile Virtual Reality Program

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

Visitor Center - 2017, Nature Center - 2023, Lighthouse Lens - 2024

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

5. Dates you will begin and complete work on your event or project: Begin – Month/Year Nov 2024 - Feb 2025 End – Month/Year _____

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

- Non-profit organization registered with the Secretary of South Carolina
- Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10
- Other Non-profit organization
- Government or governmental agency
- For-profit organization

7. Federal Employee Identification number (EIN): 57-1012715

8. Total Estimated Costs of the Proposed Event or Project: \$ 30,000

Accommodation Tax Funds Requested: \$ 15,000

Project Funding from Other Sources: \$ 15,000

9. Source of Applicant's Other Funds: Friends of Hunting Island State Park, Inc.

10. What is the anticipated total attendance for your event? _____

Total "tourist" anticipated? 1M+

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: Linda Miller, President - FOHI

Date: September 13, 2024

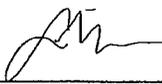
Return to:

CITY OF BEAUFORT
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Linda Miller,
President - FOHI have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

Linda Miller		September 13, 2024
Printed Name	Signature	Date

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

Projected Revenues:

This project and the scope of this request is to provide better outreach for the Lighthouse at Hunting Island State Park, mobility for educational outreach, and provides an opportunity to those who may be physically unable to explore the lighthouse or our surrounding eco-system, and natural beauty that encompasses our local community. This project provides mobility to a program that enhances the experience for anyone willing to try it, bringing it out of the park boundaries to events, schools, and/ or businesses. Use of the VR Headsets will be FREE to its participants. At times, special requests by organized groups there could be an associated charge of \$30-\$50 dollars based on their request or need. This would be a specific request only.

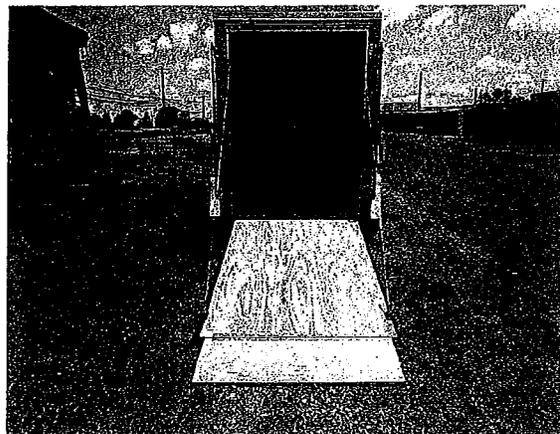
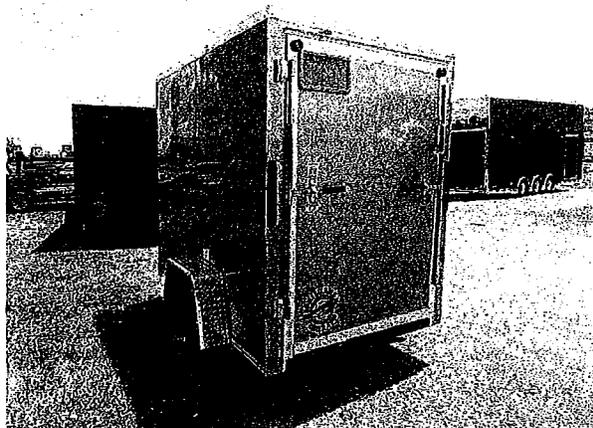
Projected Expenditures:

The project consists of making the already purchased VR equipment and programming and creating an added experience and better outreach to the local community, and physically challenged.

The expenditures and budget requested are broken down below. A trailer that has side access and a backside ramp are required for accessibility for staff and ADA provisions. Materials are needed to outfit the trailer to accommodate users for weather and bugs. To provide an experience that is comfortable and enjoyable, lighting, climate control and power will be added. Interpretive panels and trailer wrap are requested for marketing and visual recognition of the service and outreach. Estimated total cost of this project is \$30,000.00. The South Carolina State Park Service has already invested an estimated \$75,000.00 for 8 VR equipment headsets, Virtual lighthouse climb programming, and 2 others programs of South Carolina State Parks (Table Rock and Lansford Canal) Future Programming are being explored for Estuary tour and marine life exploration.

Project Description	Cost
5' X 8' V-Nosed Trailer	\$ 6,000.00
Trailer Outside Wrap	\$ 6,000.00
Climate Control (HVAC/ Heat	\$ 1,500.00
Portable Quiet Generator	\$ 1,500.00
Chairs	\$ 1,000.00
Interior Storage/ Cabinetry	\$ 2,000.00
Interpretive Materials	\$ 7,000.00
Additional Wiring/ Lighting	\$ 1,500.00
Retractable Awning	\$ 300.00
Deep Cycle Battery	\$ 300.00
Battery Charger	\$ 300.00
Other Supplies and Materials	\$ 2,000.00
Program Supplies	\$ 500.00
Project Total 71	\$29,900.00

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.



FOHI and HISP would like to put our VR resources on the road for community outreach to Beaufort County festivals, educational organizations, and share HISP with disabled citizens who cannot make it to this National State Park.

To do this, our 2025 Project will be to fabricate a mobile unit housing our VR resources to provide an experiential environment. We will purchase a builders trailer and outfit it with HISP wrap, internal fittings for electric, AC, etc. with a ramp for wheelchair access.

This Mobile Virtual Experience will be our link to the community. The Food Truck alternative for education, awareness and fun!

The AV and VR components will be sponsored by HISP and FOHI (Lighthouse climb is below for visual information)

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

This requested project budget has a beginning and an end. It is a onetime expenditure that will provide mobility access, education, and tourism-based outreach for the life of the virtual reality program experience. Hunting Island State Park and the Friends of Hunting Island are committed to this project and program based on our vision of providing an experience to those who may be challenged climbing to the top of the Hunting Island Lighthouse. The program to will be available regularly each week and will not be a reoccurring expenditure other than maintaining the mobile unit and virtual reality equipment or programming throughout its future.

This request for ATAX funding would cover the proposed breakdown located below.

Project Description	Cost
5' X 8' V-Nosed Trailer	\$ 6,000.00
Trailer Outside Wrap	\$ 6,000.00
Climate Control (HVAC/ Heat	\$ 1,500.00
Portable Quiet Generator	\$ 1,500.00
Chairs	\$ 1,000.00
Interior Storage/ Cabinetry	\$ 2,000.00
Interpretive Materials	\$ 7,000.00
Additional Wiring/ Lighting	\$ 1,500.00
Retractable Awning	\$ 300.00
Deep Cycle Battery	\$ 300.00
Battery Charger	\$ 300.00
Other Supplies and Materials	\$ 2,000.00
Program Supplies	\$ 500.00
Project Total	\$29,900.00

** City of Beaufort*

The requested funds from the ~~Beaufort County~~ ATAX grant is requested at \$15,000.00. The Friends of Hunting Island will match the awarded grant with an additional \$15,000.00 to complete the project for a total of \$30,000.00. The South Carolina State Park Service has already invested an estimated \$75,000.00 for the virtual reality equipment and program development.

** Confirmed by email of*

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

Beaufort County Mission:

Exists to serve the people of Beaufort County in a cost-effective manner, so all our citizens may enjoy and appreciate a protected quality of life, natural and developed resources in a costal environment, a diverse heritage, and economic wellbeing.

South Carolina State Park Mission:

To provide outdoor recreational activities for the citizens of South Carolina, while being stewards of the land. We shall also be leaders in the community, provide increased visitor services, and be a catalyst for increased quality of life on a local and regional basis.

Friends of Hunting Island Mission:

To preserve, protect, and enhance the natural and cultural resources of Hunting Island by educating the public and promoting a variety of programs.

Benefits:

The benefits of this unit being on the road will promote Hunting Islands' vast resources for those who have never been, those who cannot visit, and those who may be challenged and cannot participate in the offerings of this Beaufort County, South Carolina State Park. It breaks barriers allowing the park to highlight Beaufort County's natural, historical, and cultural resources for education and tourism outside the borders of the State Park.

ADA viability, Education for children, Community Outreach and Service, Local Festivals, and we believe this will be the ultimate crowd pleaser outside of Hunting Island State Park to encourage visitation and satisfy tourists and locals, alike.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

We will be able to easily identify the value proposition of this experience based on active use and requests from the community. South Carolina State Parks also operate on standard operating procedures to document and report program visitation numbers each quarter annually. This requirement by state parks, provides a measurable visitation number that is important to the program and its success.

Like Food Trucks, this will become a virtual must experience!

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a “percentage of tourism” basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

Hunting Island serves over 1.1 million visitors a year within Beaufort County and is the most visited State Park in the South Carolina. One of the most iconic structures promoted and visible throughout the state is the Hunting Island Lighthouse which is currently undergoing a +3-million-dollar repair and renovation expected to reopen late 2025 – early 2026.

Hunting Island and its staff are stewards of this protected resource and service providers to our community and its visitors each day promoting education, recreation, and preservation of the park and our local community. Tourism is what drives Hunting Island’s revenue generation. A 125-site campground at 95% occupancy and 1 cabin at 99% occupancy draws in overnight visitation from all over the world. These guests spend days adventuring and exploring our local community helping boost local revenue generation. Daily park admissions is the number one revenue generator for Hunting Island. Park passport sales, retail sales, permits, special use fees, film productions, and programming are other major revenue generating operations within the park.

This opportunity for ATAX funding will provide a means for a mobile experience that can travel anywhere a road is accessible. Hunting Island State Park and the Friends of Hunting Island regularly take part in local festivals, community outreach, and education. Allocating ATAX funding to assist in making this program better serve the public, allows outreach beyond the park and into the community and further into the state. This opportunity will be visible at festivals and events throughout Beaufort County, and travel to areas outside our local community. Outside examples for this program include: The Palmetto Sportsman’s Classic hosted by SCDNR in Columbia, Interpretive events held throughout the state, and traveling to other state parks in South Carolina promoting our community, its resources, and tourism opportunities.

In past years, the lighthouse climb has been one of the most popular attractions other than the beach to Hunting Island State Park. The view at the top of the lighthouse is an experience, adventure, and an indescribable feeling once achieved. This experience was visited by over 15,000 persons a year prior to the closing of the lighthouse. Those 15,000 visitors each year consisted of persons who were physically capable to climb 167 steps to the observation deck at the top. Funding this opportunity will improve the programs outreach by making it mobile. This mobile unit will provide park staff the ability to service members of our community to include persons challenged by its physical demand. Those who participate in the virtual experience will feel a sense of freedom and adventure within a safe environment. This program and mobile unit assist users to climb the lighthouse whether from the Oyster Festival, Lady’s Island Elementary, Beaufort High School, or the Oaks at Beaufort assisted living facility. This request for funding provides a tourism experience for those whom have never been given the right opportunity and tools to do so.

9:54 AM
 09/05/24
 Cash Basis

Friends Of Hunting Island
 Balance Sheet
 As of August 31, 2024

	Aug 31, 24	Aug 31, 23
ASSETS		
Current Assets		
Checking/Savings		
1005 · General Operating-South State	52,954.28	55,433.90
1019 · Square	0.00	2,172.06
1020 · PayPal	9.00	2,253.00
1025 · Money Market-South State	62,844.50	62,624.96
1030 · South State CD	50,000.00	0.00
Total Checking/Savings	165,807.78	122,483.92
Total Current Assets	165,807.78	122,483.92
TOTAL ASSETS	165,807.78	122,483.92
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Credit Cards		
1021 · South State #7558	0.00	11.98
1022 · South State #8176	2,624.91	0.00
1023 · American Express	0.00	2,711.81
Total Credit Cards	2,624.91	2,723.79
Total Current Liabilities	2,624.91	2,723.79
Total Liabilities	2,624.91	2,723.79
Equity		
3010 · Retained Revenues-Unrestricted	117,378.07	164,039.22
3100 · Retained Revenues - Restricted		
3110 · Grants & Designated Donations	(720.60)	141.99
Total 3100 · Retained Revenues - Restrict...	(720.60)	141.99
Net Income	46,525.40	(44,421.08)
Total Equity	163,182.87	119,760.13
TOTAL LIABILITIES & EQUITY	165,807.78	122,483.92

9:51 AM
 09/05/24
 Cash Basis

Friends Of Hunting Island
 Profit & Loss
 January through August 2024

	Jan - Aug 24	Jan - Aug 23
Ordinary Income/Expense		
Income		
10231 · AMEX Cash reward	75.00	832.70
400 · DMV License Plate	6,648.52	9,693.91
405 · Pelican Plunge Income	2,155.00	0.00
410 · General Donations	12,770.99	17,044.81
415 · Sea Turtle Conservation Donation	50,000.00	0.00
420 · Grants	15,000.00	30,000.00
430 · Membership dues	34,680.00	34,118.71
440 · Retail	7,478.25	670.35
450 · Sea Turtle Conservation Project	400.00	0.00
460 · Sea Turtle Patrol Specialist In	0.00	100.00
470 · Adopt A Turtle Nest	450.00	800.00
480 · Interest Income	182.83	182.46
Total Income	129,840.59	93,442.94
Gross Profit	129,840.59	93,442.94
Expense		
600 · Admin		
601 · Accounting Fee	3,715.00	4,675.00
602 · Association Fees	85.60	2,128.98
603 · Banking Fees	1,625.55	1,433.34
604 · Executive Expense	547.74	902.30
605 · Insurance	3,968.11	4,166.13
606 · Office Supplies	271.74	156.34
607 · Miscellaneous	446.82	180.00
608 · Postage-admin	0.00	57.40
609 · Rental Unit	1,080.00	1,215.00
600 · Admin - Other	97.21	0.00
Total 600 · Admin	11,837.77	14,914.49
610 · Advertising/Printing		
611 · Administrative	113.49	0.00
612 · Events-Advertising	0.00	325.00
614 · General	0.00	616.08
615 · Membership-Advertising	51.95	106.00
617 · DMV License Plates	0.00	1,400.00
610 · Advertising/Printing - Other	0.00	45.14
Total 610 · Advertising/Printing	165.44	2,492.22
630 · Marketing, Dev & Grant Writing	179.94	0.00
645 · People's Park Project exp	71.00	361.96
650 · Events		
651 · Pelican Plunge	593.37	236.93
650 · Events - Other	0.00	52.36
Total 650 · Events	593.37	289.29

9:51 AM
09/05/24
Cash Basis

Friends Of Hunting Island
Profit & Loss
January through August 2024

	Jan - Aug 24	Jan - Aug 23
660 · Lighthouse		
663 · Lighthouse Lens Renovation Proj	3,250.00	0.00
Total 660 · Lighthouse	3,250.00	0.00
670 · Membership		
671 · Postage	0.00	192.65
673 · Materials & Supplies	1,643.90	0.00
Total 670 · Membership	1,643.90	192.65
680 · Outreach	0.00	566.00
690 · Park Purchases		
691 · Campground	0.00	(1.65)
695 · Nature Center	2,160.70	2,803.31
697 · HISP Equipment	14,086.84	0.00
698 · Conservation Maintenance	2,095.06	0.00
Total 690 · Park Purchases	18,342.60	2,801.66
700 · Retail Expense		
702 · Postage	0.00	18.85
Total 700 · Retail Expense	0.00	18.85
705 · Nature Center Remodel	0.00	100,585.75
707 · Shorebirds	0.00	1,203.07
710 · Sea Turtle Conserve Project		
711 · STCP	4,808.64	2,415.66
712 · STPS	9,300.00	7,000.00
713 · Caretta	21,224.94	3,131.63
714 · Drone	7,080.25	0.00
710 · Sea Turtle Conserve Project - Oth...	0.00	264.36
Total 710 · Sea Turtle Conserve Project	42,413.83	12,811.65
715 · Bft Cty Property Tax Caretta	0.00	210.51
720 · Trails/Litter	0.00	26.08
740 · Website Social Media	1,365.69	739.81
751 · FOHI Lighthouse Book	2,287.55	650.03
752 · Shorebirds Project	1,021.99	0.00
753 · Environment Project	1.00	0.00
755 · Waterman Boot Project	141.11	0.00
Total Expense	83,315.19	137,864.02
Net Ordinary Income	46,525.40	(44,421.08)
Net Income	46,525.40	(44,421.08)

9:54 AM
 09/05/24
 Cash Basis

Friends Of Hunting Island
 Profit & Loss
 August 2024

	Aug 24	Aug 23
Ordinary Income/Expense		
Income		
10231 · AMEX Cash reward	0.00	70.20
410 · General Donations	326.00	22.00
430 · Membership dues	480.00	360.00
440 · Retail	1,769.12	43.39
450 · Sea Turtle Conservation Project	400.00	0.00
480 · Interest Income	22.34	22.28
Total Income	2,997.46	517.87
Gross Profit	2,997.46	517.87
Expense		
600 · Admin		
602 · Association Fees	0.00	71.69
603 · Banking Fees	0.00	12.41
604 · Executive Expense	91.39	75.81
605 · Insurance	0.00	340.00
606 · Office Supplies	41.70	0.00
607 · Miscellaneous	157.80	0.00
609 · Rental Unit	135.00	135.00
600 · Admin - Other	65.55	0.00
Total 600 · Admin	491.44	634.91
630 · Marketing, Dev & Grant Writing	29.99	0.00
660 · Lighthouse		
663 · Lighthouse Lens Renovation Proj	75.00	0.00
Total 660 · Lighthouse	75.00	0.00
670 · Membership		
673 · Materials & Supplies	1,643.90	0.00
Total 670 · Membership	1,643.90	0.00
680 · Outreach	0.00	373.00
690 · Park Purchases		
698 · Conservation Maintenance	2,095.06	0.00
Total 690 · Park Purchases	2,095.06	0.00
705 · Nature Center Remodel	0.00	3,438.48
707 · Shorebirds	0.00	42.88

9:54 AM
09/05/24
Cash Basis

Friends Of Hunting Island
Profit & Loss
August 2024

	Aug 24	Aug 23
710 · Sea Turtle Conserve Project		
711 · STCP	757.76	601.88
712 · STPS	4,500.00	4,000.00
713 · Caretta	0.00	373.01
710 · Sea Turtle Conserve Project - Oth...	0.00	11.98
	<hr/>	<hr/>
Total 710 · Sea Turtle Conserve Project	5,257.76	4,986.87
720 · Trails/Litter	0.00	26.08
740 · Website Social Media	629.16	629.16
751 · FOHI Lighthouse Book	46.38	122.98
752 · Shorebirds Project	421.43	0.00
753 · Environment Project	1.00	0.00
	<hr/>	<hr/>
Total Expense	10,691.12	10,254.36
Net Ordinary Income	<hr/> (7,693.66)	<hr/> (9,736.49)
Net Income	<hr/> (7,693.66)	<hr/> (9,736.49)

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Friends of the Spanish Moss Trail
2. Mailing Address: PO Box 401 City Beaufort State SC Postal Code 29901
3. Project Director: Sissy Perryman, FSMT Public Awareness and Development
- Project Treasurer or Administrative Official: Gene Rugala, Treasurer
- Telephone #: 843-441-3937 Email: info@spanishmosstrail.com
4. Event or Project Name: Spanish Moss Trail Wayfinding Signs Along Boundary Street Area

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

none

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

2024 - \$3,257 Visitor Marketing Print and Digital Campaign - Spanish Moss Trail; 2023 - \$2,185.17 directional signs for new Downtown Connection; 2022 - \$654.45 Rack Cards; 2020 - \$1,000 Downtown Beaufort Connector - Phase 2

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

none

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 01/2025 End – Month/Year 08/2025

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

Non-profit organization registered with the Secretary of South Carolina

Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10

Other Non-profit organization

Government or governmental agency

For-profit organization

7. Federal Employee Identification number (EIN): 45-5205655

8. Total Estimated Costs of the Proposed Event or Project: \$ 13,000.00

Accommodation Tax Funds Requested: \$ 13,000.00

Project Funding from Other Sources: \$ 0.00

9. Source of Applicant's Other Funds: N/A

10. What is the anticipated total attendance for your event? 100,000+ annually

Total "tourist" anticipated? 40% visitors (as of September 2024 per the CVB)

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

Greater Beaufort-Port Royal CVB - continued collaboration to promote the Trail

12. Provide the information below as an attachment to your application:

- A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).
- B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**
- C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.
- D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.
- E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.
- F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: *Dean Moss*

Date: 9-11-2024

2024-25 ATAX REVENUE & EXPENSE BUDGET

<u>Event/Project Projected Revenues</u>	
Admission Receipts	
Private Donations	
City of Beaufort ATAX Request	\$13,000.00
Beaufort County TAX Request	
Hilton Head ATAX Request	
Town of Bluffton ATAX Request	
Other Area ATAC Request(s)	
Total Revenues	\$13,000.00
<u>Event/Project Projected Expenses</u>	
Sales Promotional Expenses	
Publicity Materials Expense	
Newspaper Advertising	
Radio Expense	
Magazine Expense	
Television Expense	
Billboard Advertising	
Printing	
Direct Mail Expenses	
Brochure Printing	
Flyer Printing	
Other Promotional Items	
Postage Supplies	
Equipment Rental	
Speaker Fees	
Entertainment Fees	
Hospitality Fees	
Decorations	
Refreshments	
Other Expenses See below	\$13,000.00
Total Expenses	\$13,000.00
Total -Profit or Loss	

Allowable Expenses Category:

- "B. Promotional activities that compliment advertising, including materials that awareness and build or maintain a good image of Beaufort."

1. \$8,400.00 - Wayfinding Signs Along Boundary - Production and Install

2. \$4,600.00 - Wayfinding Sign FSMT staff sign location approvals, graphic art for signs, municipal approval and sign fabrication and installation management

Return to: **CITY OF BEAUFORT**
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Dean Moss have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

<u>Dean Moss</u>	<u><i>Dean Moss</i></u>	<u>9-11-2024</u>
Printed Name	Signature	Date



CITY OF BEAUFORT

TOURISM DEVELOPMENT ADVISORY COMMITTEE



Friends of the

SPANISH MOSS TRAIL

Spanish Moss Trail Wayfinding Signs Along Boundary Street Area

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (complete attached budget template).

See attached – separate budget worksheet attachment

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. The Tourism Development Advisory Committee must know specifically how you intend to spend your award.

Allowable Expenses Category:

“B. Promotional activities that compliment advertising, including materials that create awareness and build or maintain a good image of Beaufort.”

- \$8,400.00 Wayfinding Signs Along Boundary - Production and Install with local sign company
- \$4,600.00 Wayfinding Signs FSMT staff management - to work with City staff, SCDOT, and private property owners for sign permits and placement; to create the graphic art and individual sign layouts using official Spanish Moss Trail branding and official blue City signs and black finial posts; to manage permit applications and approvals; and to manage fabrication and installation approvals.

TOTAL EXPENSES: \$13,000.00

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

This year, the Friends of the Spanish Moss Trail (FSMT) are pleased to propose **Spanish Moss Trail Wayfinding Signs Along Boundary Street Area** that the 2023-2024 City A-Tax committee requested/recommended for us to pursue this year. In last year’s a-tax presentation to this committee, the FSMT shared that we had recently established a new Trail Access at the Beaufort Plaza Shopping Center. Since this new access point provides a central location with parking for visitors, the committee desired wayfinding signs along this Boundary Street area to provide visitors with easy navigation to run, walk or bike to the 10-mile Spanish Moss Trail. The FSMT have already spent time with City officials, our locally owned-sign company, professional staff and our board members to provide a plan

for the best wayfinding signs along the Boundary Street area to the Trail Access at Beaufort Plaza. The FSMT are asking for full funding of these City wayfinding signs.

D. Describe how the proposed event or project relates to the organization’s purposes and identify who is expected to benefit.

The Friends of the Spanish Moss Trail advocate for the development, maintenance and enhancements of the Trail. The Trail continues to receive regional and national recognition and has become “One of the top 10 Trails in the country to visit.” We work with travel writers and industry advocates of outdoor recreation to position Beaufort as a must-visit destination. This kind of recognition pushes people to check us out, and these physical wayfinding signs will help visitors staying in Boundary Street area hotels navigate to the Spanish Moss Trail providing for a better overall experience in our area.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a “percentage of tourism” basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

The Spanish Moss Trail is a 10-mile rails-to-trail greenway maintained in large part by the City of Beaufort. The Trail has become a "Must-Experience" outdoor activity for residents and visitors each year. Today, more than 100,000 people are visiting the Spanish Moss Trail annually – with 40% of them being visitors to our area (*data as of September 2024 from Greater Beaufort-Port Royal CVB*). Today, the Trail is busier than ever and is helping to fuel our economy.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

Many visitors learn about our Trail at Visitor Centers outside a 50-mile radius (with our provided rack cards in 3 bordering states). They in turn search our FSMT created and maintained official Spanish Moss Trail website and free mobile app. They reach out to the FSMT to learn more about our area before, during and after arriving. Because the Spanish Moss Trail offers a free, safe and scenic opportunity for visitors to enjoy popular recreational activities like running, walking, biking and fishing – the Trail is proving to be an “add on” opportunity for visitors and is stimulating tourism and recreation-related spending.

The official Mobile App – The Spanish Moss Trail Mobile Guide – provides us with important data about those using the Trail. With its GPS navigation system and user locator, we know where visitors are when they download the App and when they are on the Trail. **Here is a snapshot of our visitor analytics available on our Mobile App between August 2023– August 2024** (a strong data-driven example of how the Spanish Moss Trail is being used by visitors):

1. 23.9K+ page views of our App
2. 13.6K+ individuals currently have our App downloaded with nearly 1,000 new users between August 2023-August 2024
3. More than 30% of App users live beyond a 50-mile radius of the City of Beaufort
 - Representing 364 cities across the United States
 - Representing 22 countries outside the United States



Friends of the
SPANISH MOSS TRAIL

Status of 2024 City of Beaufort A-Tax:

Our focus this year has been to continue marketing Beaufort as an outdoor recreation destination featuring the Spanish Moss Trail. The Friends of the Spanish Moss Trail are using three professionals/vendors to complete this project (Perryman Consulting, Stingray Branding, and Alpha Graphics).

Perryman Consulting, our long-term professional consultant, is managing the full scope of this project including creating new content across print and digital platforms (i.e. updating features on the App; creating more user-friendly maps; inventorying the App’s Adventures Nearby/Things to Do to reflect new businesses, accommodations, outdoor recreation, and bike rentals etc.; adding visitor information to clarify things like e-bikes and Trail etiquette for a better overall experience for visitors). We are also using our current Charleston-based technology agency, Stingray Branding, to help code new features and host our mobile app. Note, it became clear during this project that Perryman was better suited for some of the important mobile app updates that were originally anticipated to be used with Stingray (so you will note the movement of grant funds between these two professionals).

We have used Alpha Graphics to print 5,000 updated rack cards for visitors to find in visitor centers across SC and GA as well as our local accommodations and those have already been sent via the CVB to all visitor centers (note: they are so popular in these centers we have replenished most of these centers more than once during this short time).

The full scope of this project was projected to cost \$8,021.32. Our actual costs are anticipated just under that amount and we plan to submit for reimbursement in November/December 2024:

Revenues:

Private Donations: \$4,010.21
City Atax Reimbursement: \$4,010.66
= \$8,020.87

Anticipated Expenses:

\$3,995.00 – Perryman Consulting (*final cost: \$4,590.00*)
\$3,285.00 – Stingray Branding (*anticipated cost: \$2,700.00*)
\$741.32 – Alpha Graphics (*final cost: \$730.87*)
= \$8,020.87 (*total for 2024 City Atax project*)

BOARD OF DIRECTORS

Dean Moss <i>Executive Director</i>	Joe DeVito <i>Chairman</i>	Nora Kresch <i>Secretary</i>	Eugene Rugala <i>Treasurer</i>	David Barton	Dick Deuel
Charlie Frost	Kate Hines	Steve Mix	Mary Roe	Gary Thompson	

Friends of the Spanish Moss Trail, P.O. Box 401, Beaufort, SC 29901

Spanish Moss Trail Mobile Guide (*Apple Store/Google Play*) • SpanishMossTrail.com • info@spanishmosstrail.com

CITY OF BEAUFORT ACCOMMODATION TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Applicant: Greater Beaufort-Port Royal CVB/DMO for City of Beaufort
2. Mailing Address: PO BOX 501 Beaufort SC 29901
Street or P.O. Box City State Zip
3. Project Director: Robb Wells
- Project Treasurer or Administrative Official: Greta Sandberg, Treasurer
 Telephone #: 843-525-8521 Fax #: _____ Email: robb@beaufortsc.org

Event or Project Name: Destination Marketing – FY 2024-2025

List below any Accommodations Tax funding that you have previously been awarded from the City of Beaufort for this specific event or project.

None for this current project. Prior years are listed below.

List Accommodations Tax funding that you have received in the previous years for other events or projects.

Here is a recent sample and not reflective of all received City ATAX Grants

- City ATAX Grant FY 23-24 - \$146,000 for Destination Marketing
- City ATAX Grant FY 22-23 - \$156,000 for Destination Marketing
- City ATAX Grant FY 21-22 - \$130,000 for destination Marketing
- City ATAX Grant FY 21-22 - \$20,000 for DMO SALES PLAN
- City ATAX GRANT FY 20-21 \$120,000 for destination marketing
- City AtAX Grant FY 19-20 - \$148,000 for Destination Marketing

List any Accommodations Tax funds you have requested or received from other municipalities or counties for this proposed event or project.

N/A	N/A
Name	Amount

5. Date you will begin and complete work on your event or project: July 2024 (In PROGRESS) June 2025
Begin – Month/Year End – Month/Year

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)
- Non-profit organization registered with the Secretary of South Carolina
- Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10
- Other Non-profit organization
- Government or governmental agency
- For-profit organization

7. Federal Employee Identification number (EIN): 57-0801740

8. Total Estimated Costs of the Proposed Event or Project: \$556,000

Accommodation Tax Funds Requested: \$ 160,000

Project Funding from Other Sources: \$ 396,000

9. Source of Applicant's Other Funds: We are the designated Destination Marketing Organization for Beaufort County and City of Beaufort. Please see Budget for full list of funding.
10. What is the anticipated total attendance for your event? Total "tourist" anticipated? Estimated 750,000+
11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration: As the DMO, we remain committed to collaborating with nonprofits, event organizers, municipalities, and the county to market and promote this destination. Our ongoing objective is to raise awareness through a comprehensive promotional program that highlights the attractions, festivals, and stakeholders that make this area unique. Additionally, we will focus on capturing new market share, creating fresh opportunities for our partners.
12. Provide the information below in an attachment to your application:
- A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed. **Attached Appendix A.**
 - B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. The Tourism Development Advisory Committee must know specifically how you intend to spend your award. **Media Flow Chart/Cost Allocation Attached Appendix B**
 - C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words. **The requested funding would specifically be allocated toward the overall destination marketing campaign that works within the DMO's marketing plan while collaborating with the Sub-Brands – History & Culture | Events & Festivals | The Arts | Outdoor Recreation.**
 - D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit. **Attached Appendix C**
 - E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism. **Attached Appendix D**
 - F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated? **Attached Appendix E**

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director:  Date: 9-10-29

Return to: CITY OF BEAUFORT
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I  have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

<u></u>	<u></u>	<u>9-10-24</u>
Printed Name	Signature	Date

WORKING GBPRCVB BUDGET 2024-2025 || Budget

	24-25FY
Ordinary Income/Expense	
DMO Cash On hand	150,000.00
Income	
40000 · REVENUES	
43000 · GOVERNMENT SUPPORT/GRANTS	
Total 43000 · GOVERNMENT SUPPORT/GRANTS	1,147,500.00
Total 44000 · MARKETING SALES	31,000.00
Total 45000 · OTHER SALES	25,300.00
49900 - MISCELLANEOUS INCOME	29,000.00
Total 40000 · REVENUES	1,382,800.00
Expense	
50000 · PERSONNEL EXPENSES	
Total 50000 · PERSONNEL EXPENSES	519,439.00
60000 · NON-PERSONNEL EXPENSES	
61000 · GENERAL EXPENSES	
61100 · SUPPLIES	8,000.00
61110 · POSTAGE & SHIPPING	5,000.00
Total 61200 · PRINTING	4,500.00
61300 · ADVERTISING	
61310 · PRINT ADVERTISING	45,000.00
61320 · ELECTRONIC MEDIA	200,000.00
61330 - SEO	18,000.00
61340 · BILLBOARDS - Out of Home	5,000.00
61350 · SOCIAL MEDIA	70,000.00
61360 · EMAIL MARKETING	14,000.00
61370 · PUBLIC RELATIONS	37,500.00
61380 · WEBSITE	34,000.00
61381 · WEBSITE - PLUGINS	22,000.00
61391 · PODCAST	36,000.00
61392 · FESTIVAL/EVENT ADVERTISING CO-OP	25,000.00
61399 · AD PRODUCTION/GRAPHIC DESIGN	10,000.00
Total 61300 · ADVERTISING	516,500.00
61400 - SALES - GROUPS & MEETINGS	
61405 - MEMBERSHIPS/DUES	4,000.00
61410 - TRAVEL	28,000.00
61420 - TRADESHOWS & MEETINGS	47,000.00
61430 - PROMOTIONAL ITEMS	
61450 - PRINTING	
61460 - ADVERTISING	25,000.00
61470 - FAM TOURS/SITE VISITS	10,000.00
61390 - BEAUFORT AREA SPORTS COUNCIL	
Total 61400 - SALES - GROUPS & MEETINGS	114,000.00
Total 61500 · TELEPHONE & TELECOMMUNICATION:	4,000.00
Total 61600 · BUSINESS/LIABILITY INSURANCE	5,000.00
61700 · TRAVEL/COMMUNITY RELATIONS	
61710 · TRAVEL	5,000.00
61720 · COMMUNITY RELATIONS	5,000.00
61750 · BOARD MEETINGS/RETREATS	
61760 · TRADE SHOWS/EVENTS	2,000.00
61770 · FAM TOURS - PR SITE VISITS	6,000.00
Total 61700 · TRAVEL AND MEALS	18,000.00
61800 · DUES & SUBSCRIPTIONS	3,500.00
61850 · STAFF DEVELOPMENT/TRAINING	5,000.00
Total 61900 · FEES/SERVICE CHARGES	7,600.00
Total 61000 · GENERAL EXPENSES	691,100.00

Total 62000 · OCCUPANCY EXPENSES	54,251.00
Total 63000 · EQUIPMENT	9,700.00
64000 · CONTRACT SERVICES/PROF. FEES	
64100 · ACCOUNTING & AUDIT	30,000.00
64150 · RETIREMENT PLAN ADMIN.	1,000.00
64400 · RESEARCH	40,000.00
64600 · DESIGN/PHOTOGRAPHY SERVICES	5,500.00
64700 · FULFILLMENT SERVICES	20,000.00
64900 · OTHER SERVICES	
64910 · DOCUMENT SHREDDING SERVICE	150.00
64920 · ACCOUNT SERVICES	4,000.00
64930 · MEDIA PLACEMENT	4,000.00
Total 64900 · OTHER SERVICES	8,150.00
Total 64000 · CONTRACT SERVICES/PROF. FEES	104,650.00
Total 69000 · OTHER EXPENSES	3,500.00
Total 60000 · NON-PERSONNEL EXPENSES	863,201.00
Total Expense	1,382,640.00
Allocation of Expenditures Personnel	38%
Advertising & Sales	46%

Appendix C

Our advertising goal for this year is to sustain visitation by launching a multifaceted advertising and promotional campaign targeting drive markets. The strategy focuses on identifying and engaging travel intenders who are likely seeking or planning a coastal getaway, encouraging them to explore Beaufort. We aim to use the most effective media platforms to showcase the natural beauty of Beaufort, inspiring travelers to visit.

Campaign Tactics: We will implement an integrated campaign that includes paid media, print, online, social media, and public relations. This approach is designed to position Beaufort as more than just a coastal destination—highlighting it as an enriching experience. By utilizing a variety of media channels, we will engage our audience when they are in the mindset of seeking an escape, open to travel inspiration, and planning their next vacation.

Our research shows that the top attractions for visitors to Northern Beaufort County include outdoor activities, wide open spaces, fewer crowds, and accessibility by car. The "InnerCoastal Campaign" allows us to tailor creative content to target our key demographics effectively. We will employ the following proven advertising tactics to reach our core audiences:

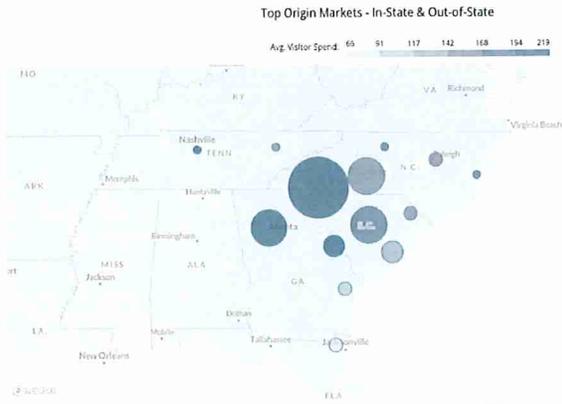
- Online advertising (search and web banners)
- Print media
- Social media
- Outdoor Media Where/When Appropriate
- Video/TV Audiences
- Third-party endorsements (travel writers and publicity)

SCPRT Tourism Advertising Grant (TAG) FY 2020/2021 Media Flowchart Greater Beaufort - Port Royal CVB																																																			
2020															2021																																				
JUL	AUG	SEPT	OCT			NOV			DEC			JAN			FEB			MAR			APR			MAY																											
4	11	18	25	1	8	15	22	29	5	12	19	26	3	10	17	24	31	7	14	21	28	4	11	18	25	1	8	15	22	29	5	12	19	26	2	9	16	23	30	6	13	20	27	4	11	18	25	1	8	15	22
[Grid with shaded cells representing media spend]																																																			
JUL - DEC TOTAL = \$95,250																																																			
MAY			JUN			JUL																																													
2	9	16	23	30	6	13	20	27	4	11	18	25																																							
[Grid with shaded cells representing media spend]																																																			

Travel Writer FAM/Press Trip

We will leverage editorial calendars, trending topics, and daily news coverage to identify relevant story angles in Beaufort and pitch them to a variety of national online and print publications. In 2024-2025, our media outreach will continue to prioritize drive markets, with a strong focus on offering media trips and experiences in Beaufort. Our efforts will target travel writers and travel publications, as well as regional drive market audiences. Special attention will be given to publications and writers in South Carolina, North Carolina, East Tennessee, and parts of Florida and Virginia. To accommodate the preferences of these writers, we will offer both in-person (in-market) FAM trips and Virtual PR Trips.

Current Top Markets:



Visitor Market Area	% Visitors
Greenville-Spartanburg-Asheville-Anderson	11.3%
Columbia SC	8.5%
Charlotte NC	9.2%
Atlanta GA	7.7%
Augusta GA	6.0%
Charleston SC	3.5%
Savannah GA	2.8%
Raleigh-Durham (Fayetteville) NC	2.4%
Jacksonville FL	2.3%
Florence-Myrtle Beach SC	2.1%

Appendix D

The city of Beaufort has seen growth in both room supply and room demand. This data richly proves that the strategic direction previously set forth to encourage visitors to stay for several nights – rather than day tripping or one or two night trips – is still viable and very important. The ongoing growth in the marketplace may slow over the course of the year but marketshare needs to be maintained.



How does your year-to-date hotel performance compare to the same time last year?

Source: STR. Note: These KPIs are applicable to your Primary Geography only and are not tied to the date range filter at the top. If you do not subscribe to STR Demand or Revenue data, those KPIs will display as null values. Tip: Set an alert for the KPI you want to watch closely.

Occupancy 60.9%	ADR \$123	Demand 194.1 K	Revenue \$24.2 M
YTD % Change -1.2%	YTD % Change -4.4%	YTD % Change -1.1%	YTD % Change -5.1%

Appendix E

The GBPRCVB's marketing plan and initiatives include several strategies and tactics to attract visitors to Northern Beaufort County. Each tactic must be measurable to ensure each tactic's effectiveness. To continue as a fully accountable and transparent organization, the below information includes annual tracking initiatives and overall success metrics.

Occupancy/Smith Travel Report/KeyDATA – The GBPRCVB – in partnership with area hotels and short term rentals – subscribes to the monthly Smith Travel Report, as well as KEY DATA, which tracks and reports data for the overnight lodging industry including occupancy, average daily rate, supply and demand for lodging businesses in Beaufort and Port Royal. This report allows us to monitor expected occupancy rates, based on historical data, and track actual occupancy rates to measure the impact and effectiveness of our marketing efforts.

Tab 2 - Trend Beaufort-Port Royal
 Beaufort-Port Royal & Other Hotels/Short Term Rentals
 Period: 08/01/2021

Source: Smith Travel Research - Monthly report - August - Sample

The table displays monthly performance metrics for the Beaufort-Port Royal area from 2018 to 2021. It is divided into several sections:

- Occupancy %:** Shows monthly occupancy rates for 2018, 2019, 2020, and 2021 (YTD). Includes a 'Year To Date' summary and a 'Running 12 Months' trend.
- ADR (Average Daily Rate):** Shows monthly ADR values for 2018, 2019, 2020, and 2021 (YTD). Includes a 'Year To Date' summary and a 'Running 12 Months' trend.
- RevPAR (Revenue Per Available Room):** Shows monthly RevPAR values for 2018, 2019, 2020, and 2021 (YTD). Includes a 'Year To Date' summary and a 'Running 12 Months' trend.
- Supply:** Shows monthly supply values for 2018, 2019, 2020, and 2021 (YTD). Includes a 'Year To Date' summary and a 'Running 12 Months' trend.
- Demand:** Shows monthly demand values for 2018, 2019, 2020, and 2021 (YTD). Includes a 'Year To Date' summary and a 'Running 12 Months' trend.
- Revenue:** Shows monthly revenue values for 2018, 2019, 2020, and 2021 (YTD). Includes a 'Year To Date' summary and a 'Running 12 Months' trend.
- Chain %:** Shows monthly chain percentage values for 2018, 2019, 2020, and 2021 (YTD).

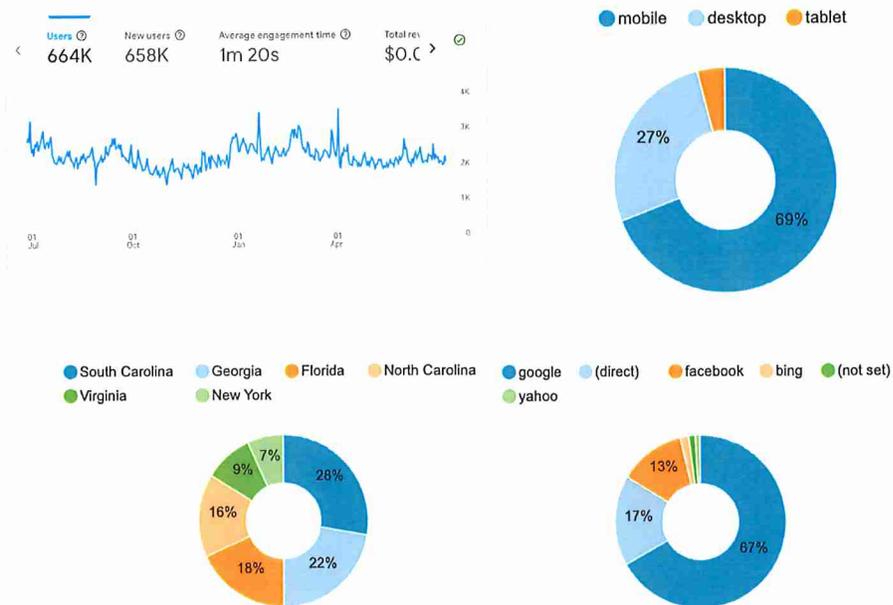
Each section includes a 'Year To Date' summary and a 'Running 12 Months' trend. The table also includes a 'Period Change' column for each metric.

Visitor Spending/Economic Impact - The Greater Beaufort-Port Royal Convention and Visitors Bureau (CVB) utilizes a comprehensive approach to track visitor spending and economic impact data. One of the primary tools we employ is Zartico, which allows us to monitor visitor spend across multiple categories, including accommodations, retail, and food and beverage. This provides us with a clear picture of how different sectors of the local economy are benefiting from tourism activity.

In addition, we work with Advance Travel & Tourism, which provides third-party data to help us track and analyze ad spend and performance metrics. This data-driven approach ensures that our marketing investments are effective and aligned with our goals of attracting and retaining visitors.

To assess the overall economic impact of tourism, we also leverage the Tourism Economics' Economic Impact Calculator. This tool enables us to measure the economic lift generated by various visitor-driven activities such as festivals, events, meetings, and sports tourism. By using these resources, the CVB is able to quantify the value of tourism to our community and make informed decisions that support sustainable growth and economic development.

Website Statistics – Through G4 (formally Google Analytics), we report traffic to our site monthly, the most recent report is included with this application (see below). G4 allows us to track detailed information about site visitors, including their city and state, how much time they spend on the site and what pages they view.



Source: G4/Google Analytics

Print and Online Advertising – See attached media plan – Appendix B

Public Relations – The GBPRCVB works with Friday Night PR, which allows us to track and assign a value on coverage of our area as well as provide us with up-to-date contact information for media and updated travel writer editorial calendars in an effort for us to “pitch” the Beaufort area when it’s related to their topic.

Visitor Guide Fulfillment –YTD number we have fulfilled 55,000 guides all around the United States, as well as some international locations.

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Applicant: Greater Beaufort-PortRoyal CVB/DMO for City of Beaufort

2. Mailing Address: PO BOX 501 Beaufort SC 29901
Street Address or P.O. Box City State Zip

3. Project Director: Robb Wells

Project Treasurer or Administrative Official: Greta Sandberg

Telephone #: 843-525-8521 Fax #: 843-986-5405 Email: robb@beaufortsc.org

4. Event or Project Name: 2024-2025 Sales Plan - FY 24/25

List below any Accommodations Tax funding that you have previously been awarded from the City of Beaufort for this specific event or project.

None for this current project. Prior years are listed below

List Accommodations Tax funding that you have received in the previous years for other events or projects.

Here is a recent sample and not reflective of all received City ATAX Grants

- ⊙ City ATAX Grant FY 23-24 \$34,500 for Sales
- ⊙ City ATAX GRANT FY 22-23 \$31,000 for Sales
- ⊙ City ATAX GRANT FY 20-21 \$120,000 for Destination Marketing
- ⊙ City ATAX GRANT FY 18-19 \$148,000 for Destination Marketing
- ⊙ City ATAX GRANT FY 17-18 \$135,000 for Destination Marketing
- ⊙ City ATAX GRANT FY 16-17 \$130,000 for Destination Marketing
- ⊙ City ATAX GRANT FY 15-16 \$100,000 for Destination Marketing

List any Accommodations Tax funds you have requested or received from other municipalities or counties for this proposed event or project.

N/A

5. Date you will begin and complete work on your event or project: (July 2024 Project started) June 2025
Begin – Month/Year End – Month/Year

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

- Non-profit organization registered with the Secretary of South Carolina
- Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10
- Other Non-profit organization
- Government or governmental agency
- For-profit organization

7. Federal Employee Identification number (EIN): 57-0801740

8. Total Estimated Costs of the Proposed Event or Project: \$ 72,764.00

Accommodation Tax Funds Requested: \$ 40,000.00

Project Funding from Other Sources: \$ 32,764.00 102

9. Source of Applicant's Other Funds: We are the designated Destination Marketing Organization for Beaufort County and City of Beaufort

10. What is the anticipated total attendance for your event? Total "tourist" anticipated? 750,000+

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration: As the DMO we will continue to work with all nonprofits, event organizers, municipalities, and the county to market/promote this destination. Our goal is to create awareness for our destination through a multifaceted promotional program that is inclusive of those attractions, festivals and stakeholders that make the area unique.

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**). Attached Appendix A.

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. The Tourism Development Advisory Committee must know specifically how you intend to spend your award.
Cost Allocation Attached Appendix B

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words. **The equated funding would specifically be allocated toward the overall sales plan that works within the DMO's business plan while collaborating with the stakeholders that directly benefit by meetings, sports and group travel markets.**

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit. Sales is one of the core

Sales is a fundamental role of a Convention and Visitors Bureau (DMO). Our objective is to collaborate with stakeholders to create and implement a sales strategy that raises awareness of the destination and generates "bookings" for our market. This grant will enable the CVB to enhance its sales efforts, targeting new market segments. As part of our continually evolving growth plan, we are placing greater focus on proactive sales initiatives to promote our destination.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

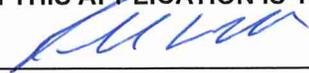
Attached Appendix D

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

Attached Appendix E

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: Robb Wells 

Date: 9-16-24

Return to: **CITY OF BEAUFORT**
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Robert Williams, II have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

<u>Robert Williams, II</u>	<u></u>	<u>9-10-24</u>
Printed Name	Signature	Date

Appendix A

WORKING GBPRCVB BUDGET 2024-2025 || Budget

	24-25FY
Ordinary Income/Expense	
DMO Cash On hand	150,000.00
Income	
40000 · REVENUES	
43000 · GOVERNMENT SUPPORT/GRANTS	
Total 43000 · GOVERNMENT SUPPORT/GRANTS	1,147,500.00
Total 44000 · MARKETING SALES	31,000.00
Total 45000 · OTHER SALES	25,300.00
49900 - MISCELLANEOUS INCOME	29,000.00
Total 40000 · REVENUES	1,382,800.00
Expense	
50000 · PERSONNEL EXPENSES	
Total 50000 · PERSONNEL EXPENSES	519,439.00
60000 · NON-PERSONNEL EXPENSES	
61000 · GENERAL EXPENSES	
61100 · SUPPLIES	8,000.00
61110 · POSTAGE & SHIPPING	5,000.00
Total 61200 · PRINTING	4,500.00
61300 · ADVERTISING	
61310 · PRINT ADVERTISING	45,000.00
61320 · ELECTRONIC MEDIA	200,000.00
61330 · SEO	18,000.00
61340 · BILLBOARDS - Out of Home	5,000.00
61350 · SOCIAL MEDIA	70,000.00
61360 · EMAIL MARKETING	14,000.00
61370 · PUBLIC RELATIONS	37,500.00
61380 · WEBSITE	34,000.00
61381 · WEBSITE - PLUGINS	22,000.00
61391 · PODCAST	36,000.00
61392 · FESTIVAL/EVENT ADVERTISING CO-OP	25,000.00
61399 · AD PRODUCTION/GRAPHIC DESIGN	10,000.00
Total 61300 · ADVERTISING	516,500.00
61400 - SALES - GROUPS & MEETINGS	
61405 - MEMBERSHIPS/DUES	4,000.00
61410 - TRAVEL	28,000.00
61420 - TRADESHOWS & MEETINGS	47,000.00
61430 - PROMOTIONAL ITEMS	
61450 - PRINTING	
61460 - ADVERTISING	25,000.00
61470 - FAM TOURS/SITE VISITS	10,000.00
61390 - BEAUFORT AREA SPORTS COUNCIL	
Total 61400 - SALES - GROUPS & MEETINGS	114,000.00
Total 61500 · TELEPHONE & TELECOMMUNICATION	4,000.00
Total 61600 · BUSINESS/LIABILITY INSURANCE	5,000.00
61700 · TRAVEL/COMMUNITY RELATIONS	
61710 · TRAVEL	5,000.00
61720 · COMMUNITY RELATIONS	5,000.00
61750 · BOARD MEETINGS/RETREATS	
61760 · TRADE SHOWS/EVENTS	2,000.00
61770 · FAM TOURS - PR SITE VISITS	6,000.00
Total 61700 · TRAVEL AND MEALS	18,000.00
61800 · DUES & SUBSCRIPTIONS	3,500.00
61850 · STAFF DEVELOPMENT/TRAINING	5,000.00
Total 61900 · FEES/SERVICE CHARGES	7,600.00
Total 61000 · GENERAL EXPENSES	691,100.00

Total 62000 · OCCUPANCY EXPENSES	54,251.00
Total 63000 · EQUIPMENT	9,700.00
64000 · CONTRACT SERVICES/PROF. FEES	
64100 · ACCOUNTING & AUDIT	30,000.00
64150 · RETIREMENT PLAN ADMIN.	1,000.00
64400 · RESEARCH	40,000.00
64600 · DESIGN/PHOTOGRAPHY SERVICES	5,500.00
64700 · FULFILLMENT SERVICES	20,000.00
64900 · OTHER SERVICES	
64910 · DOCUMENT SHREDDING SERVICE	150.00
64920 · ACCOUNT SERVICES	4,000.00
64930 · MEDIA PLACEMENT	4,000.00
Total 64900 · OTHER SERVICES	8,150.00
Total 64000 · CONTRACT SERVICES/PROF. FEES	104,650.00
Total 69000 · OTHER EXPENSES	3,500.00
Total 60000 · NON-PERSONNEL EXPENSES	863,201.00
Total Expense	1,382,640.00
Allocation of Expenditures Personnel	38%
Advertising & Sales	46%

2024-2025 SALES BUDGET

TRADE SHOWS//TRAVEL/MEMBERSHIP DUES/FAM TOURS/TRADE ADVERTISING

TRADE SHOW REGISTRATION AND TRAVEL (61410/61420)

SYTA - NYC - 8/9-13/2024

You must be a member of SYTA to participate in this show. This is a pre-scheduled appointment show - tour operators work primarily with student groups.

Registration	\$1,525.00	
Transportation	600.00	
Accommodation	1,200.00	
Per Diem	200.00	
ESTIMATED COST		\$3,525.00

MCASC (MOTORCOACH ASSOC OF SC) - Williamsburg, VA - 8/27/30/2024

Joint show with SC, NC & VA Motorcoach Associations. Must be a member of one of them to participate. In addition to appointment with tour operators, the CVB will have a display booth at this show.

Registration	\$700.00	
Transportation	300.00	
Accommodations	600.00	
Per Diem	100.00	
ESTIMATED COST		\$1,700.00

Midwest Sales Mission (Co-op with Dynamic Destinations) - (KS,IA,MO,NE)=

In-person sales calls on up to 25 tour companies in this region.

Registration	\$2,000.00	
(Registration fee pays for vehicle rental, gasoline and client gifts)		
Airfare	500.00	
Accom	800.00	
Per Diem	100.00	
ESTIMATED COST		\$3,400.00

Going on Faith - TBD 8/2024

Part of the "Group Leader Family of Travel" shows. Buyers wrk with church adult and youth groups. This a pre-scheduled appointment show.

Registration/Booth	\$1395.00	
Transportation	650.00	
Accom	600.00	
Per Diem	100.00	
ESTIMATED COST		\$ 2,745.00

SMALL MARKET MEETINGS - St. George, UT - 9/25-27/2024

Part of the "Group Leader Family of Travel" shows. This is a pre-scheduled appointment show. Buyers are meeting and event planners ht may be interested in smaller destinations.

Registration	\$2,195.00	
Airfare	500.00	
Accom	500.00	
Per Diem	100.00	
	ESTIMATED COST	\$3,295.00

Boomers in Groups - TBD

Part of the "Group Leader Family of Travel" shows. This is a pre-scheduled appointment show. Buyers are tour operators and group leaders that are looking for soft adventure and active itineraries for the Boomer generation.

Registration/Booth	\$1,495.00	
Transportation	600.00	
Accom	600.00	
	100.00	
	ESTIMATED COST	\$ 2,795.00

ACCENT EAST -Traverse City, MI - 11/10-14/2024

This show is owned by "MARS". This is a walk up show - we will have a display table offering information and buyers will stop by for information. There is a regional itinerary building segment of this show and all itineraries are shared with the tour operators and group leaders.

Registration	\$499.00	
Transportation	500.00	
Accom	500.00	
Per Diem	100.00	
	ESTIMATED COST	\$1,599.00

NTA- National Tour Association Travel Exchange - Ottawa, Canada - 11/9-12, 2024

You must be a member of NTA to participate in this show. This is a pre-scheduled appointment show with tour operators. We will co-host a dinner with Dynamic Destinations for tour operators at this show.

Registration	\$1,295.00	
Addl Staff	895.00	
Sponsorship	2,000.00	
Shipping/Booth Furnishing	1,000.00	
Transportation (2 ppl)	800.00	
Accom (2 ppl)	1,500.00	
	ESTIMATED COST	\$7,490.00

MPI-Carolina Chapter Meeting - Oct-Nov - Cary, NC

We plan to re-join MPI so the we are eligible to bid on the 2026 Annual meeting.

Registration	\$250.00
Transportation	100.00
Accommodations	400.00
Per Diem	100.00

ESTIMATED COST **\$850.00**

Travel South International Showcase - Atlanta, GA - 12/2-5/2024 (TBD)

Our hope is to be able to participate in the State's booth at the discounted registration cost of \$1395 instead of \$2,595. The int'l market is a new market for us to explore at the advice of SCPRT as well as our colleagues in the state that are already benefiting from this market - Hilton Head, Charleston & Myrtle Beach.

Registration	\$2,595.00
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(If our own booth)

Transportation	400.00
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(We would drive to this show and take our exhibit to save money on shipping)

Accommodations	1,000.00
Per Diem	100.00

ESTIMATED COST **\$4,095.00**

ABA- American Bus Association Marketplace - Philadelphia, PA - 1/31 - 2/4/2025

You must be a member of ABA to participate in this show. The largest industry show to meet with domestic tour operators from all over the USA, Canada and Mexico. Pre-scheduled appointments. In addition, we have purchased a display booth.

Registration	\$1,695.00
Additional staff	1,695.00
Sponsorship	5,500.00
Addl Expenses for Booth	3,000.00 (furnishings, shipping, entertainment)
Airfare (3 ppl)	1,500.00
Accom (3 ppl)	2,750.00

ESTIMATED COST **\$16,140.00**

SCSAE - Columbia, SC - January 2025

We purchase booth to promote the Greater Beaufort area as a desirable destination for small meetings and conferences. Attendees "shop" the booths for information

Registration/Booth (2)	\$725.00
Transportation	250.00
Accommodation	250.00

ESTIMATED COST **\$1,225.00**

United Motorcoach Association Expo - 2/20-23/2025 - Oklahoma City, OK

(Co-sponsor with Dynamic Destinations)

Registration	\$895.00
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Sponsorship	\$500.00	
Transportation	300.00	
Accommodations	500.00	
Per Diem	100.00	
	ESTIMATED COST	\$2,295.00

Rendezvous South - Panama City Beach, FL - February 2025

Only the official DMO of destination can register for this show and can bring 2 hoteliers - included in the cost. Additional hoteliers at \$1,000 each.

Registration	\$4,500.00	
Accom	1,000.00	
Transportation	400.00	
Accommodation	800.00	
	ESTIMATED COST	\$6,700.00

Select Traveler - TBD - March 2025

This is a pre-scheduled appointment show. Group leaders and tour operators in attendance are looking for more luxury, high-end travel experiences. Many of the buyers are Bank Travel Managers.

Registration/Booth	\$1595.00	
Transportation	500.00	
Accom	500.00	
Per Diem	100.00	
	ESTIMATED COST	\$2,695.00

STS Domestic Showcase - March 2025 - Panama City Beach, FL

This is a pre-scheduled appointment show to meet with tour companies specifically interested in southern itineraries.

Registration Fee	\$1,395.00	
Media Marketplace	895.00	
Airfare (2)	800.00	
Booth Flowers/Giveaways.	500.00	
Accommodations (2)	1,000.00	
Per Diem	100.00	
	ESTIMATED COST	\$4,690.00

African American Travel Conference - TBD - Spring 2025

One of the "Group Leader Family of Travel" shows. This a pre-scheduled appointment show. Buyers are our operators and group leaders interested in travel ideas for their black clients.

Registration/Booth	\$1595.00	
Transportation	500.00	
Accom	400.00	
Per Dien	100.00	

ESTIMATED COST **\$ 2,595.00**

NTA CONTACT - 5/7-10/2025 - Mackinac City

This is a tour operator education retreat. We will co-sponsor an event with the Dynamic Destinations group and will have an exhibit table to display our information. Seller attendance is limited to "sponsors only". No appointments.

Registration	\$1,500.00
Co-Op Sponsorship	2,000.00
Airfare	600.00
Accommodations	600.00
Per Diem	100.00

ESTIMATED COST **\$4,800.00**

SCSAE - Annual Convention - May-June 2025 - TBD

Attendees are Association Executives that are responsible for planning meetings and events. The CVB will purchase a Sponsor table.

Registration/Booth	\$475.00
Transportation	250.00
Accom	500.00

ESTIMATED COST **\$1,225.00**

Small & Boutique Meetings Summer Showcase - June 2025 - TBD

Registration
Transportation
Accommodations
Per Diem

ESTIMATED COST

PROJECTED TRADE SHOW BUDGET - \$72,764.00

FAM TOURS/SITE VISITS/CLIENT EVENTS (61470)

Site Visits/FAM Tours	\$4,000.00
Meeting Planner FAM Tour	\$3,000.00
Client events during Trade Shows	\$3,000.00

PROJECTED BUDGET - \$10,000.00

ANNUAL MEMBERSHIP DUES (61405)

SCSAE	\$250.00
ABA	\$650.00
MCASC	\$275.00
SYTA	\$995.00

NTA	\$800.00
MPI	\$500.00

PROJECTED BUDGET - \$3,470.00

TRADE ADVERTISING/Print & Digital (61460)

Multi View Digital Campaign/Tour & Meetings	\$18,000.00
SCSAE Annual Directory	\$2,500.00
Un-planned Opportunities	\$10,000.00

PROJECTED BUDGET - \$30,500.00

TOTAL SALES BUDGET REQUEST - \$117,829.00

=

Measuring Sales Success

The goal of our sales team at Visit Beaufort is to promote our area as a top convention and meetings destination by showcasing our small town charm with quaint streets and perfect weather that resides all year round. We can see direct economic impact by growing hotel room night production and increasing sales at restaurants, shops and attractions.

Meetings/Conventions Hosted:

Accent East: Total attendance was over 100 people, 23 were tour operators.

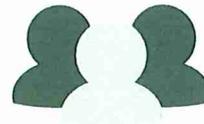
Veterinary Encouragement by the Sea - Continuing Education Conference: There were 350 registered delegates at this year's conference.



12+
RFP's



3,380
Room Nights



15
Trade Shows



6
Site Visits



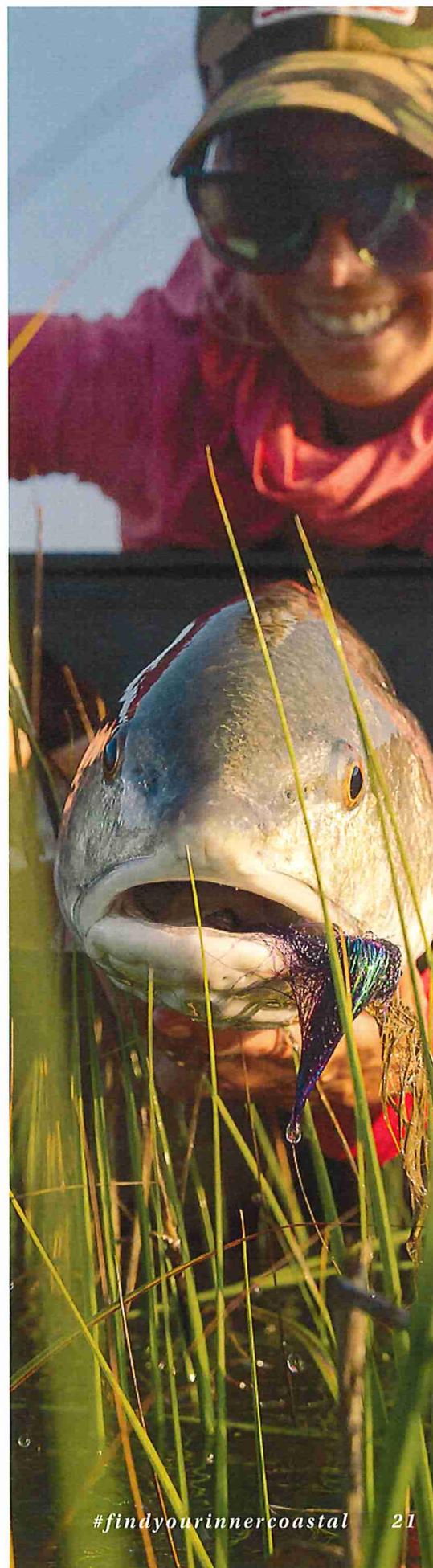
587
Leads Sent

Beaufort Area Sports Council

The Beaufort Area Sports Council was established to develop sports-related events that impact our community. By working with local, regional, and national organizations the Sports Council supports a wide range of events that offer a diverse opportunity for athletes of all ages and all sports. The mission is to enrich the quality of life and economic well-being of Northern Beaufort County by supporting existing events and attracting new sporting events and activities.

2023 | 2024 Sports in Beaufort

- Southern Redfish Cup:** September 9th, 2023
- 18th Annual Beaufort River Swim + 5K/8K Run:** June 8th, 2024
- American Junior Golf Association:** June 3rd - 6th, 2023
- South Carolina Junior Golf Association:** June 29th - 30th, 2024
- Coastal Athletic Association:** April 21st - 23rd, 2024



#findyourinnercoastal 21

**ACCOMMODATIONS TAX
APPLICATION FISCAL YEAR 2025**



**CITY OF BEAUFORT
TOURISM DEVELOPMENT ADVISORY COMMITTEE**

Submitted by:

Gullah Traveling Theater, Inc.



EIN: 46-1806147

711 Bladen Street, Suite #319, Beaufort, SC 29902

Anita Singleton Prather, President & Chief Executive Officer

auntpearlie@yahoo.com • 843-263-5229

Denise Mason Bullitt, Grant Strategist

sankofainspirit@gmail.com • 843-593-0904

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Gullah Traveling Theater, Inc.
2. Mailing Address: 711 Bladen Street, Suite #319 City: Beaufort State: SC Postal Code: 29902
3. Project Director: Anita Singleton Prather
- Project Treasurer or Administrative Official: Marie Tate, Bookkeeper and Denise Bullitt, Business & Grant Strategist
- Telephone #: M. Tate 843-252-4642/ D.Bullitt 843-593-0904 Email: mtate@gttinc.org and dbullitt@gttinc.org
4. Event or Project Name: 2024 Gullah Christmas Celebration

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

\$25,950 was received for 2023's celebration.

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

n/a

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

n/a

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 10/1/2024 End – Month/Year 12/31/2024

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

- Non-profit organization registered with the Secretary of South Carolina
- Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10
- Other Non-profit organization
- Government or governmental agency
- For-profit organization

7. Federal Employee Identification number (EIN): 46-1806147

8. Total Estimated Costs of the Proposed Event or Project: \$ 103,511

Accommodation Tax Funds Requested: \$ 40,000

Project Funding from Other Sources: \$ 63,511

9. Source of Applicant's Other Funds: Ticket sales, ad sales, corporate sponsorships, grants

10. What is the anticipated total attendance for your event? 2,000 show tickets plus 1,000+ for The Taste of Gullah

Total "tourist" anticipated? 45% or more

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

We are working with the Beaufort, Port Royal & Sea Islands Visitors Bureau and Black Southern Belle Media Company to execute our marketing plan and track its performance.

Continued on next page.

* Corrected by phone/email. 10/21/24
w/ Denise Budlitt- 

2024-25 ATAX REVENUE & EXPENSE BUDGET

12. A. Detailed Budget

<u>Event/Project Projected Revenues</u>	
Admission Receipts	\$ 51,900
Private Donations	18,800
City of Beaufort ATAX Request	40,000
Beaufort County TAX Request	
Hilton Head ATAX Request	
Town of Bluffton ATAX Request	
Other Area ATAC Request(s) HTAX	3,000
Total Revenues	\$ 112,700 \$113,700 *
<u>Event/Project Projected Expenses</u>	
Sales Promotional Expenses	\$ 5,250
Publicity Materials Expense	7,500
Newspaper Advertising	
Radio Expense	2,000
Magazine Expense	
Television Expense	10,000
Billboard Advertising	
Printing	3,000
Direct Mail Expenses	
Brochure Printing	
Flyer Printing	
Other Promotional Items	5,000
Postage Supplies	
Equipment Rental	4,200
Speaker Fees	1,000
Entertainment Fees	17,600
Hospitality Fees	3,000
Decorations	
Refreshments	
Other Expenses (Detail Below)	44,961
Total Projected Revenues Expenses	\$ 103,511
Event/Project Projected Profit or Loss	\$ 9,189 \$10,189.00 *

Other Expenses

Venues - USCB & Waterfront Park	\$ 8,920	Sanitation & Clean Up	\$ 1,500
Ground Transportation	2,000	Insurance	1,500
Hotel Accommodations	2,000	Total Other Expenses	\$ 44,961
Program Supplies	1,000		
Cookoff Awards	4,000		
Staff Salaries	24,041		

12.B. Defined Budget

The Gullah Traveling Theater, Inc. is requesting \$40,000 to support our Sea Island Christmas Celebration scheduled for December 5 – 8, 2024. The event honors the history and culture of the Lowcountry while inviting tourists, snowbird residents, vacationers, and members of the Beaufort diaspora to launch their holiday celebrations here in the heart of our beloved Sea Islands.

This 4-day celebration is growing in maturity and participation. After suffering through the challenges of the pandemic, we are beginning to see new growth in the event which drew, according to our DMO, between 40% - 45% of tourists each day.

Specifically, included in the City of Beaufort ATAX request is the following.

Digital & Social Media Ad Buys	\$ 9,500
Television & Radio Advertising	12,000
Venue	3,500
Entertainment	15,000
Total Amount Included in this request	\$40,000

12.C. A Brief Summary of Event

“Kickoff Your Holidays in Historic Beaufort, SC!”

Join us for the **Gullah Traveling Theater’s 2024 Christmas Celebration**, December 5-8. Immerse yourself in 4 days of rich Lowcountry traditions. On Thursday, participate in the Gullah Geechee Chamber of Commerce Symposium, focusing on Environmental & Energy changes affecting the Lowcountry with Thursday and Friday evening performances of the updated musical, ***Gullah Kinfolk Christmas Wish... Freedom!*** Friday also features Christmas shows for students and, on Saturday, enjoy the **Gullah Taste of Christmas & Rice Cookoff** at Chambers Waterfront Park with **live entertainment, food trucks, a Christmas marketplace, and boat parade**. Sunday wraps up with Gullah-style worship at historic local churches and the Christmas parade through Historic Beaufort. For more information visit: www.gullahkinfolktravelingtheater.org.

12.D. Describe how the event relates to the organization’s purposes and identify who is expected to benefit.

The Gullah Traveling Theater, Inc.’s mission is to preserve the rich history of the Gullah people and highlight their essential role in the culture and livelihood of Historic Beaufort. Our work is deeply rooted in the heritage of our region, and we strive to ensure that the significance of Gullah culture is celebrated as a national treasure, while contributing to the positive economic impact of the Lowcountry.

While Beaufort is well-known as a spring and summer destination, our Gullah Traveling Theater's Christmas Celebration in early December is helping to fortify it as a holiday destination. Each year, we attract more visitors, with nearly 43% of last year's attendees registering as tourists, according to data from our DMO. This event extends the tourism season into the non-peak months, offering an affordable and uniquely Gullah holiday experience. It supports the City's efforts to draw holiday shoppers and visitors to Historic Downtown Beaufort for shopping, dining, and entertainment.

We have intentionally designed the event to encourage participants to stay from Thursday through Monday, with highlights such as worship services at our historic churches on Sunday morning and the downtown Christmas parade in the afternoon. This year, we are excited to partner with the Gullah Geechee Chamber of Commerce from Georgetown, SC, to sponsor our symposium, expanding the event's reach to business owners, residents, and organizations in that region and beyond.

Additionally, we will prepare a specific campaign reach to South Carolina educators across the state who may be interested in attending the symposium. We will partner with 1 or 2 local hotels to add a holiday package for the weekend that we can promote with the event to encourage overnight stays.

The Gullah Christmas Celebration benefits both visitors and the local community. Visitors gain an immersive cultural experience, learning about Gullah history while enjoying the festive atmosphere. Local businesses, artists, and vendors benefit from the increased economic activity during the extended holiday weekend, helping to strengthen the region's economy. By combining cultural preservation with tourism, we ensure that Gullah heritage remains vibrant and economically sustaining for future generations.

12.E. Impact on Tourism

The Gullah Traveling Theater's Christmas Celebration is expected to have a significant impact on tourism in the Beaufort area by attracting both local and out-of-town visitors during the non-peak holiday season. We are adding digital-based, targeted marketing that will gather close to 1 million views during the 60 days leading up to our event. Based on data from last year's event, nearly 45% of attendees were tourists, demonstrating that the celebration successfully draws visitors from outside the region. By marketing the event as a 4-day event, arriving on Thursday and departing on Monday, we encourage longer stays, which leads to greater spending on accommodations, dining, shopping, and entertainment in the Beaufort area.

In addition to providing a uniquely Gullah holiday experience, the event aligns with the City's goals of boosting local tourism-related revenue. The inclusion of free activities, such as the symposium, the Gullah Taste of Christmas, alongside City sponsored events like the Christmas boat parade, we are partnering with the City of Beaufort to these events accessible while still driving economic activity. We also promote partnerships with local vendors, artisans, and food trucks, further benefiting the tourism industry by increasing foot traffic in key areas. With strategic marketing aimed at regional tourists, and new partnerships with organizations such as the Gullah Geechee Chamber of Commerce, we anticipate continued growth.

Of special interest for 2024, we are anticipating a surprise celebrity judge for our Rice Cookoff, and we intend to livestream it across Facebook Live while the chefs prepare each entry. Not only do we believe this will heighten the excitement, inviting others to join in virtually could also increase interest in visiting Beaufort in the future.

This event not only celebrates our cultural heritage but also plays a pivotal role in boosting the local tourism industry and supporting the economy during a traditionally slower time of year.

12.F. Evaluation

Evaluation Marker	Evaluation Measure
Event Participation	DMO tourist tracking
Ticket Sales	Zip code collection of purchasers
Live streaming of Cookoff	Virtual visitors

###

I, Anita Singleton Prather, have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

Anita Singleton Prather		9/12/2024
Printed Name	Signature	Date

From: [Denise Bullitt](#)
To: [Jay Phillips](#)
Subject: Re: ATAX Application: Gullah Traveling Theater
Date: Monday, October 21, 2024 3:18:24 PM
Attachments: [2025 City ATAX Application Budget only.pdf](#)

CAUTION: This email originated from outside your organization. Exercise caution when opening attachments or clicking links, especially from unknown senders.

Hi Jay,

There is a \$1,000 addition error. Total Revenue = \$113,700, making net profit \$10,189.

I have attached a corrected copy.

Please let me know if you have any questions.

On Thu, Oct 17, 2024 at 11:53 AM Jay Phillips <jphillips@cityofbeaufort.org> wrote:

Good morning Denise,

Upon review of the ATAX application for the GTTI, on Page 4, 2024-25 ATAX Revenue & Expense Budget, I believe the total revenues of \$112,700 are apparently excluding the \$3,000 Other Area HTAX request. The total revenues should equal \$133,700 and less Total Projected expenses total profit should equal \$10,189. If you agree, upon your reply I will note it on the application, or you can send a corrected copy.

Please Advise,

Jay Phillips

Procurement Administrator

City of Beaufort

Beaufort, SC 29902

Gullah Traveling Theater, Inc.
2024 Beaufort City ATAX Reimbursement Report
 Gullah Christmas Taste of Gullah
 November 30 - December 3, 2023

Revenue		
Event Ticket Sales	\$	20,262
Private Donations	\$	11,775
Beaufort City ATAX Request	\$	21,094
Total Event Revenue		<u>\$ 53,131</u>

Expenses		
Sales Commissions	\$	5,796
Publicity Materials Expense	\$	5,147
Digital & Media Advertising Expense	\$	5,000
Radio & Television Advertising	\$	2,800
Printing Expenses	\$	2,996
Equipment	\$	1,141
Entertainment Fees	\$	8,848
Speaker Expenses	\$	750
Decorations	\$	1,332
Refreshments	\$	813
Venue Rental	\$	6,850
Event Insurance	\$	550
Event Supplies	\$	165
Total Event Expenses		<u>\$ 42,188</u>

Total Request for Reimbursement	\$ 21,094
--	------------------

Total Non-Reimbursable Expenses		
Salaries & Wages		<u>\$29,875</u>
TOTAL ALL EXPENSES		<u>\$ 72,063</u>
Net Loss		<u><u>\$ (18,932)</u></u>

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Penn Center, Inc.
2. Mailing Address: PO Box 126 City St. Helena Island State SC Postal Code 29920
3. Project Director: Kevin G. Holman, MPA
- Project Treasurer or Administrative Official: Richard Kenyon, CPO, Financial Manager
- Telephone #: 843-838-7105 Email: Kholman@penncenter.com
4. Event or Project Name: 40th Heritage Days Celebration

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

2023-2024 Cit Atax Funding Amount \$8,075.00 2020-2021 City Atax Funding Amount of \$1,000.00

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

2023-2024 County Atax Award \$30,000.00 2022 County Atax Award \$19,000.00 2021 County ATAX Grant award \$2,500.00

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 01/24 End – Month/Year 12/24

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

- Non-profit organization registered with the Secretary of South Carolina
- Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10
- Other Non-profit organization
- Government or governmental agency
- For-profit organization

7. Federal Employee Identification number (EIN): 57-0324930

8. Total Estimated Costs of the Proposed Event or Project: \$ \$50,000.00

Accommodation Tax Funds Requested: \$ \$10,000.00

Project Funding from Other Sources: \$ \$40,000.00

9. Source of Applicant's Other Funds: Sponsorships, Private Donations, and Penn Center

10. What is the anticipated total attendance for your event? 12,000

Total "tourist" anticipated? 5,000

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

12. Provide the information below as an attachment to your application:

- A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).
- B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**
- C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.
- D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.
- E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.
- F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: _____



Date: 9/13/2024

Return to:

CITY OF BEAUFORT
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Kevin Holman have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

Kevin Holman

Printed Name



Signature

9/13/2024

Date

What is the anticipated total attendance for your event? 12,000 to 15,000

Total "tourist" anticipated? 4,500

A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

Requested funds will launch a blended multi-marketing campaign that will exponentially increase tourists to this event and, thereby, stimulate the city's economy. This objective will be met by utilizing standard marketing procedures, such as newspaper coverage, radio announcements, and grassroots methods, but also by launching a cutting-edge digital marketing platform that will increase the number of attendees for its 2024 Heritage Days Celebration from approximately 3,240 tourists to approximately 5,000 tourists. Data will be gathered by the creation of a QR code that can be easily accessed via one's mobile phone and by mobile positioning data gathered by the DMO. We also will collect this information through a sign-up forms and feedback forms digitally and/or manually.

Detailed descriptions of all required areas are contained in the narrative.

Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

Penn Center's mission statement is as follows:

"The mission of Penn Center is to promote and preserve Penn's true history and culture through its commitment to education, community development and social justice."

The 40th Heritage Days Celebration touches on all three components of Penn Center's mission statement. This event, through speakers, music, culinary foods, and art serves as a valuable entity for delivering the history, past and present, of the Gullah Geechee people. And most importantly to maintain a public voice that strives toward carving our spaces for equity and social justice for all citizens of this nation. By offering opportunities for a host of black entrepreneurs and business owners, the event serves as a solid platform for ensuring the Center is a vehicle for community development.

A. E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

Noted in the following narrative

A. F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

Noted in the following narrative.

Narrative

Overview

The Heritage Days Celebration showcases the history, art, and culture of the Gullah Geechee people, featuring musical entertainment, cultural dishes, scholars and educators. Local vendors as well as non-local vendors will show their crafts, which will include storytelling, basketry, and artistry that are part of the cultural legacy that is rooted in West Africa and Central Africa.

The showcasing of these cultural roots continually and consistently produces an increase in attracting tourists of all ages and backgrounds, including historians, linguists, folklorists, and anthropologists. As we strengthen our relationships with tour agencies, the festival also serves as a destination for group tours to the event. As the COVID Pandemic continued to come down from its peak, marketing strategies for the 2022 Celebration produced a higher volume of tourists to the city of Beaufort. This influx of tourists for this event was economically beneficial to the city of Beaufort and Beaufort County as people came to Beaufort and their island destination. Attendees came from as far south as Florida and as far north as Pennsylvania. Families booked hotels and stayed at venues throughout Beaufort. They shopped in the city grocery stores, boutique shops, and ate at local restaurants, circulating tourist dollars into our local economy. Economically, this event brought forth a plethora of economically driven benefits to the City of Beaufort and Beaufort County.

Project Objective

The objective for the requested funds is to launch a blended multi-marketing campaign that will exponentially increase the number of tourists/travelers to this event and, thereby, stimulating the city's economy. This objective will be addressed in the following way:

Utilize standard marketing procedures, such as newspaper coverage, radio announcements, and grassroots methods that include sending hardcopy publicity material to Welcome Centers in South Carolina, North Carolina and Georgia;

Utilize its recent subscription to Constant Contact by way of creating marketing campaigns centering of the festival that will be sent in excess to 1300 contacts. Contact lists include individuals residing throughout the United States, universities in South Carolina, North Carolina and Georgia;

Send promotional material to group tour companies in South Carolina, North Carolina, and Georgia, as well as others, especially along the Gullah Geechee Corridor.

Utilize and leverage strong digital marketing strategies in cities and states to include Charlotte, NC; Columbia, SC; Greenville/ Spartanburg, Anderson SC; Charleston, SC; Augusta, GA; Atlanta, GA; Knoxville, TN; and Jacksonville, FL. These targeted audiences will receive multiple marketing collateral highlighting tourism opportunities regarding the event itself as well as information noting Beaufort accommodations, restaurants, and places to shop.

Commercials centering on the Heritage festival and the *featured artist* exhibition of Cassandra Gillens that will be showed at the Center's York W. Bailey Museum will frequently air. Cassandra Gillens work has been exhibited throughout the low country and eastern United States. She is a renowned artist that was a stable at the Beaufort County Black Chamber of Commerce.

Impact on Tourism

- a. Penn Center has historically attracted visitors for its three-day Heritage Days Celebration that range between 12,000 to 18,000 attendees. This three-day event began and is the oldest festival in the state of South Carolina that focuses on Gullah Geechee history, art and culture. For 2024 we are doing a Pre-Heritage celebration that will show the works of Gullah Meditation in partnership with the Mellon Foundation, and will showcase spiritualistic music.
- b. Understanding the definition of tourism relates to those who travel "at least 50 miles to attend the event," Penn Center anticipates the number of attendees for its 2023 Heritage Days Celebration increased from approximately 3,240 tourists to approximately 4,000 tourists. This estimation is based on data from the 2022 Heritage Days Celebration that cited 27% of attendees came from Charlotte, NC (36%); Atlanta, GA (20%); Greenville-Spartanburg-Ashville-Anderson SC (15%), Charleston, SC (18%). By creating a timeline that will begin in August and increase with intensity throughout September, October and the first week in November, Penn Center expects to meet and exceed its target of 5,000 tourists who will attend this year's 40th anniversary festival.
 - a. Data regarding the number of tourists who attend this year's festival will be gathered via the creation of a QR code that can be easily accessed via one's mobile phone, by issuing a ticket to each attendee as they enter the event and asking attendees to place an admission ticket in glass jars labeled with the name of a state on each jar, and by mobile positioning data gathered by the OMO. We will also institute feedback forms, as well as sign-ins through the museum automated sign in forms which records this information.
 - b. Penn Center's Marketing, Advertising and Promotions Plan utilizes paid, owned and earned channels including digital & print media, broadcast, social media, experiential marketing, content marketing, and more. Penn Center collaborates with tourists' destinations sites throughout Beaufort. County and regional, national and global markets to ensure a seamless and consistent voice that serves the city of Beaufort and its surrounding areas.

Strategies for Successfully Implementing its Marketing Plan: Develop a strategic ad campaign and targeted media plan to include advertising via television, radio stations, newspaper outlets throughout South Carolina, North Carolina and Georgia.

Produce collateral and compelling content that serves to promote the multifaceted reasons for attending this event and for securing lodging, shopping and dining in the city of Beaufort's restaurants.

Partner with other strategic entities to stretch marketing dollars and extend marketing reach to include military bases in the Beaufort and Welcome Centers throughout South Carolina, North Carolina, and Georgia.

Utilize established connections with individuals, universities, museums, newspapers, etc. to publicize and promote the event with clear and efficient messaging.

Ensure consistent positioning and messaging across all communication tactics - including traditional and non-traditional advertising, publishing, social media, and public relations efforts.

Utilize Penn Center's website to convert the "Undecided Traveler" to choose attending the 2024 Heritage Days Celebration as the perfect time to experience not only the festival but to experience the City of Beaufort.

Utilize tools within the Center's newly designed site to continually provide strong visuals and authentic content about its 2024 Heritage Days Celebration event. Highlight captivating, destination specific visuals so visitors get a true sense of the destination.

Routinely upload images to Penn Center's website and social media platforms to provide authentic information about the event. Which includes content for the purpose of increasing the conversion of "Trip Extenders," by showcasing that there is too much to do in Beaufort to stay for less 2 days. The historic aspect bring historians and students that need more days to explore the ancestors life within the sea islands.

90.7 percent of our target audiences use Google as a search engine for targeted interests. Additional internet marketing is included with all the paid print media purchases referenced and itemized in the budget section of this application. A broad network of sites will be employed based on specific geographical locations, demographic data, job titles, keyword searches and online content choices, as well as a combination of behavior indicators. Mobile based technology will be used for the purpose of allowing the targeting of a specific location with precision and accuracy including areas of interest.

Determination for the above Marketing Plan

The determination was made by carefully analyzing information gleaned from tourists who consistently visit Penn Center. All visitors are asked to sign the guest registry when they enter the museum and the Welcome Center. Visitors note their name, hometown, email address and comment on their visit. Analysis of this information has demonstrated that tourists represent a steady increase in the following areas:

- a) Tourists who are interested in broadening the scope of their history, culture and familial (ancestral) ties to Africa, especially West Africa, as well as tourists who are interested in learning more about the history of Penn Center and see this history as important information that connects with their history as citizens of the United States of America.
- c) Tourists who want to learn more about the life of Rev. Martin Luther King, Jr.
- d) International tourists who come with the purpose of learning more about the history of the south through the lens of Penn Center's history.
- e) Established and young scholars who are conducting extensive research on a particular aspect of Penn Center's history: the establishment of Penn School and the reasons for the founding of this school; the teaching of various trades at the school, the implementation of a school for midwifery, the anchor the center played during the Civil Rights Movement, and more.

f) What is unique about the location of Penn Center, is that it also brings tourists who want to visit the beach, relax and enjoy the offerings of a festival during their vacation stays in Beaufort, SC.

Coordination and Collaboration to Leverage Impact

The following additional media, print and digital sources will be utilized to reach individual and group travelers.

National Parks Service
Beaufort Regional Chamber of Commerce
The Beaufort County Black Chamber of Commerce
Gullah Geechee Cultural Corridor
Designated Marketing Organization (DMO), Rob Wells, President and CEO,
Greater Beaufort and Port Royal Convention and Visitors Center
International African American Museum
Welcome and Visitors Centers in South Carolina, North Carolina and Georgia
Southern Travel & Lifestyle
Atlanta Tribune
Charlotte Observer
Charleston Post and Courier
The Post and Courier
Asheville Citizen
The Sun News
The State
Greenville News
The Island Packet
Anderson Independent
Lowcountry Weekly
Garden and Gun
Savannah Tribune
Black Enterprise
National Association of Black Journalists

• Fiscal Stability and Administrative Ability

Penn Center has consistently presented its Heritage Days Celebration for 40 years, with the only exceptions being 2019 and 2020, the height of the COVID 19 Pandemic. Each year the institution has demonstrated fiscal stability in covering all incurred expenses. The festival is overseen by the St. Helena Gullah community, Penn Center staff, the Executive Director and the Board of Trustees. Final reports have been delivered prior to due dates and budgets have been presented accurately and without errors or discrepancies.

Prior History and Success with City of Beaufort ATAX Grants

Research has shown that Penn Center, Inc. submitted and received an ATAX Grant in 2020 in the amount of \$10,000.00 for the institution's 2020 Heritage Day's Celebration Event. The final cost for the presentation of this event was \$80,000. Revenue outside of the ATAX award totaled \$70,000. The institution successfully generated said revenue via campus tours, museum fees, sponsorship and vendor fees. 4000 tourists attended the event.

Grants that have been received in the last five years. Identify the project and amount awarded.

Penn Center did not receive an award for the submission of a 2022 ATAX grant, but prior history has shown that ATAX funding was awarded in 2016 and 2015 for this event. We also received as noted before awards for 2023 Atax submitted.

Describes the success and or obstacles in carrying out the project and what was learned.

Success has always been multifaceted. Penn Center's mission has always been met with the presentation of this event. Hotels and bed and breakfast establishments have always shown complete occupancy at the time the three-day Heritage Days Celebration takes place. With bookings for lodging, city restaurants, gas stations, and shops increase their revenue.

What becomes apparent, and, therefore, learned, is that the interest in Gullah Geechee history and culture continues to grow. The economic impact to city establishments also increases. Tourists who come to this event return to Beaufort for future vacations, road trips and weekend getaways. A revisiting to Penn Center is always a high priority.

In the past, obstacles have always centered on documenting the number of tourists who attend this event. However, advances in technology and digital platforms for marketing the event have assisted in closing this gap and rendering a more accurate count of tourists who attend this event.

a. What was the impact on tourism including the number of tourists involved and how they were documented.

As stated earlier, the weekend for hosting this event, which is the second weekend in November, has consistently demonstrated that Beaufort hotels and bed and breakfasts skyrockets. In fact, there is great difficulty in securing any form of accommodation in the Beaufort area during the weekend of the Heritage Days Celebration. In the past, tourists have been documented via sign-on sheets and surveys that are distributed and collected from all attendees. However, with the presentation of its 2024 40th Heritage Days Celebration. Throughout the year, we have injected thousands of dollars into the community when you combine, all the organizations that have come to explore Penn Center. Since our accommodations are very limited we recommend hotels within Beaufort as well as exploring Beaufort itself. Organizations have to order food, which usually comes from companies based in Beaufort, SC, but not just that tourist dollars are injected through the city of Beaufort. Tourist must travel through Beaufort and ultimately visit many of the sites and business located within the city limits.

Fiscal Stability and Administrative Ability

Penn Center has consistently presented its Heritage Days Celebration for thirty-nine years, with the only exceptions being 2019 and 2020, the height of the COVID 19 Pandemic. Each year the institution has demonstrated fiscal stability in covering all incurred expenses. The festival is overseen by prominent members of the St. Helena Gullah community, Penn Center staff, the Executive Director and the Board of Trustees. Final reports have been delivered prior to due dates and budgets have been presented accurately and without errors or discrepancies.

Budget

Item	Cost	ATAX Grant	Penn Center's Cont
Heritage Days Save the Date Postcards	\$1500.00 Distributed to Welcome Centers in South Carolina, North Carolina, and Georgia	800.00	800.00
Heritage Days Flyers	\$800.00 Distributed to Real Estate Companies in SC, NC and GA as well as local hotels.	550.00	550.00
Heritage Days Rack Cards	\$3500.00 Distributed to Welcome Centers in SC, NC, and GA	2000.00	2000.00
Heritage Day Programs	\$3600.00 Programs will list local hotels, restaurants, and real estate dealers.	2000.00	2000.00
Bryn Marketing	\$6,000.00 Digital Marketing	3000.00	3000.00
WHHITV	\$750.00 Broadcasting of the event.	325.00	325.00
Postage	\$500.00	150.00	150.00
Coastal Magazine	\$700.00	350.00	350.00
Posters	\$1650.00	325.00	325.00
Brochures	\$1000.00	500.00	500.00
Total	\$20000.00	10000.00	10000.00

Note: See the completed budget that was contained in the 2023 Accommodations Tax Application Packet

Organization Name: Penn Center, Inc. _____	Project Name: 2024 40th Heritage Days Celebration
Event/Project Revenue Projected, Parking Fee Receipts, Private Donations, Sponsorships	\$50,000.00
City of Beaufort ATAX Requests	\$10,000 _____
Port Royal ATAX Requests	0 _____
Hilton Head ATAX Requests	0 _____
Bluffton ATAX Requests	0 _____
Beaufort County ATAX Requests	To Be Determined for 2024 _____
Other Area ATAX Requests	0 _____
Total Revenues	<u>50,000.00</u>
<u>Expenses:</u>	
Sales Promotions Expenses	\$1000.00 _____
Publicity Materials Expense	\$7000.00 _____
Newspaper Advertising	\$600.00 _____
Radio Advertising	0 _____

Magazine Advertising	\$1,000.00
Television Advertising	\$800.00
Billboard Advertising	0
Printing	\$10,000.00
Direct Mail Expenses	\$3,000.00
Brochure Printing	\$5,000.00
Flyer Printing	\$2,000.00
Other Promotional Items	\$3,000.00
Postage Supplies	\$1,000.00
Equipment Rental Service Rental	\$3,500.00
Entertainment Fees Speaker Fees	\$4,500.00
Hospitality Fees	\$15,000.00
Decorations	\$1,200.00

Total Expenses

Event Profit (Loss) Total Request for ATAX Grant

\$50,000.00

\$10,000.00

Prior History and Success with City of Beaufort ATAX Grants

Research has shown that Penn Center, Inc. submitted and received an ATAX Grant in 2020 in the amount of \$10,000.00 for the institution's 2020 Heritage Day's Celebration Event. The final cost for the presentation of this event was \$80,000. Revenue outside of the ATAX award totaled \$70,000. The institution successfully generated said revenue via campus tours, museum fees, sponsorship and vendor fees. 4000 tourists attended the event. We received for our 2023 Heritage Submission \$8,075.00 from City of Beaufort Atax, in which we were able to sustain a successful heritage celebration. Each year we focus on using our partners more and more. The Mellon Foundation is sending 2 performers this year, in which will contribute greatly to our success and draw. The phenomenal artist Cassandra Gillens will bring low country art enthusiast from all over the country. We always use our awards in conjunction with all of our sponsorships and partnerships to best utilize every dollar.

Grants that have been received in the last five years. Identify the project and amount awarded.

Penn Center did not receive an award for the submission of a 2022 ATAX grant, but prior history has shown that ATAX funding was awarded in 2016 and 2015 for this event. We received the county atax grant this past year for submission of the 2023 39th annual heritage festival with an award of \$30,000.

Describes the success and or obstacles in carrying out the project and what was learned.

Success has always been multifaceted. Penn Center's mission has always been met with the presentation of this event. Hotels and bed and breakfast establishments have always shown complete occupancy at the time the three-day Heritage Days Celebration takes place. With bookings for lodging, city restaurants, gas stations, and shops increase their revenue.

What becomes apparent, and, therefore, learned, is that the interest in Gullah Geechee history and culture continues to grow. The economic impact to city establishments also increases. Tourists who come to this event return to Beaufort for future vacations, road trips and weekend getaways. A revisiting to Penn Center is always a high priority.

In the past, obstacles have always centered on documenting the number of tourists who attend this event. However, advances in technology and digital platforms for marketing the event has assisted in closing this gap and rendering a more accurate, but will always focus on more efficient system

What was the impact on tourism including the number of tourists involved and how they were documented.

As stated earlier, the weekend for hosting this event, which is the second weekend in November, has consistently demonstrated that Beaufort hotels and bed and breakfasts skyrockets. In fact, there is great difficulty in securing any form of accommodation in the Beaufort area during the weekend of the Heritage Days Celebration. In the past, tourists have been documented via sign-on sheets and surveys that are distributed and collected from all attendees.

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Applicant: Port Royal Sound Foundation

2. Mailing Address: 310 Okatie Highway, Okatie, SC 29909

3. Project Director: Jody Hayward, Executive Director

Project Treasurer or Administrative Official: Astrid Fabian, Director of Finance

Telephone #: 843-645-7774 **Fax #:** n/a **Email:** jhayward@portroyalsoundfoundation.org

4. Event or Project Name: School of Fish Exhibit for PRSF Maritime Center

List below any Accommodations Tax funding that you have previously been awarded from the City of Beaufort for this specific event or project.

No City of Beaufort ATAX funds have been awarded for the School of Fish Exhibit, but previous City of Beaufort ATAX funds for other Maritime Center exhibits include: FY24- \$6,650 (Reptile Displays- final report to be submitted prior to January 2026 deadline); FY23- \$6,100 (Shark Exhibit); FY22- \$3,750 (Outdoor Exhibits); FY21- \$3,700 (Animals of the Port Royal Sound); FY20- \$2,500 (History Timeline); FY19- \$7,114 (Main Gallery Map)

List Accommodations Tax funding that you have received in the previous years for other events or projects.

City of Beaufort ATAX: FY17- \$6,100; FY16- \$3,750

2% Beaufort County ATAX: FY24- \$20,000; FY23- \$91,000; FY22- \$52,380; FY21- \$50,250; FY20- \$26,500; FY19- \$8,300; FY17- \$10,000; FY16- \$3,750

3% Beaufort County ATAX: FY22- \$223,000; FY20- \$500,000

List any Accommodations Tax funds you have requested or received from other municipalities or counties for this proposed event or project.

None

5. Date you will begin and complete work on your event or project:

Begin – January 2025 (when funding is received) **End –** December 2025 (within 12 months)

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

Non-profit organization registered with the Secretary of South Carolina

Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10

Other Non-profit organization

Government or governmental agency

For-profit organization

7. Federal Employee Identification number (EIN): 20-4431922

8. Total Estimated Costs of the Proposed Event or Project: \$ 13,500

Accommodation Tax Funds Requested: \$ 9,500

Project Funding from Other Sources: \$ 4,000

9. Source of Applicant's Other Funds: Our funding comes largely from private donations. PRSF believes that high-quality educational activities and outdoor experiences should be accessible for all regardless of limiting circumstances, so much of what we offer has minimal fees or is FREE, including admission to our Maritime Center. Expenses for this project will be covered by operational funds until grant reimbursement is received. Operational funds will also cover the remaining \$4,000 needed to complete the exhibit.

10. What is the anticipated total attendance for your event? Over 28,000 per year

Total "tourist" anticipated? 49% = 13,720 per year

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

We believe that promoting the Maritime Center as a whole, including our diversity of high-quality exhibits, is more effective than focusing on individual attractions. We value collaboration and a multi-faceted approach to our marketing efforts in order maximize our reach. We promote the Maritime Center outside of 50-miles digitally using social media (Facebook, Instagram) and Google (Google Display Ads, Youtube). Our most recent video campaign shares "The Sound Effect," that special feeling you get when you visit the Lowcountry, which reached over 1,400,000 people from September 2023-September 2024: https://youtube.com/playlist?list=PLAv_68a8MqnvL-MyCDTnIM9tT7qgsnpVk&feature=shared

We are currently collaborating with the Beaufort CVB DMO and are planning to meet with the Hilton Head Island-Bluffton Chamber of Commerce DMO to coordinate marketing efforts by targeting the same tourism markets outside 50 miles through social media and Google campaigns. We have applied for a grant from Beaufort County 2% ATAX to implement this campaign.

For the local market, we partner with publications like Beaufort Lifestyle, Local Life, Island News, Bluffton Sun, and the Beaufort County Military and Veterans Resource Guide, as well as sharing our rack cards with visitor's centers throughout the state, particularly those along I-95.

All of these efforts will draw tourists to the Maritime Center, and after their visit they will be inspired to go out and explore everything else Beaufort has to offer.

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (complete attached budget template).

See attached budget

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. The Tourism Development Advisory Committee must know specifically how you intend to spend your award.

All ATAX funds will be used to contract 3D Topics for the design, production, and installation of the School of Fish exhibit. See attached proposal.

C. A brief summary description of proposed project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

The Port Royal Sound Foundation (PRSF) requests \$9,500 to design and install a School of Fish Exhibit in the entry foyer of the Maritime Center. The Maritime Center is a free museum and aquarium that serves as a key tourist destination for visitors to Beaufort. This new exhibit will be a realistic art display of a school of fish swimming over visitors' heads as they enter the museum. Continually adding new and exciting displays like this is a key component of attracting people to Beaufort and the Maritime Center as first-time guests and returning visitors.

D. Describe how the proposed project relates to the organization's purposes and identify who is expected to benefit.

The mission of the Port Royal Sound Foundation (PRSF) is to conserve the Port Royal Sound for the environmental, cultural, and economic well-being of our area. We strive to be the leading authority and advocate for the Port Royal Sound, providing and supporting education, research, and conservation initiatives to preserve it.

Since opening in 2014, our FREE Maritime Center museum and aquarium has welcomed over 228,000 visitors. We are on track to host over 28,000 visitors in 2024 alone. Our engaging exhibits for all ages attract tourists from all over the world. Our diverse exhibit offerings have something for everyone, ranging from live animals to educational information about ecology, history, culture, and recreation to beautiful art displays and photo ops.

The new School of Fish Exhibit will be an awe-inspiring and eye-catching addition to PRSF that welcomes visitors in a whimsical and wonderful way. As soon as they enter the Maritime Center, they will feel as though they are swimming underwater in the unique environment of the Port Royal Sound. This will set the tone for the rest of their exciting, educational, and immersive journey through the Maritime Center.

This project aligns with our goals of education and conservation, as well as the Tourism Development and Advisory Committee's goals of attracting tourists to Beaufort. This exhibit will showcase the beautiful and healthy fishery population of Beaufort, which is a significant part of Port Royal Sound ecology as well as a major draw to visitors coming into Beaufort from outside 50 miles. Tourism is a significant component of northern Beaufort County's economy, bringing in over \$1.4 billion annually. 79% of visitors consider tourist attractions as an important factor influencing them

to visit, along with access to water (BeaufortSC.org/About-Us/Economic-Impact/). Recreational fishing is a major asset to our economy as well, and generated an impact of nearly \$140 million in the southern coastal congressional district in 2018 (American Sportfishing Association).

PRSF and the Maritime Center embraces the intersection of these economic drivers, celebrating our healthy ecosystem and teaching tourists how to responsibly recreate during their time here. The School of Fish Exhibit will be a visual representation of this work, and will complement our other exhibits and initiatives, including our annual Inshore Slam Fishing Tournament. The inaugural Fishing Tournament will take place this fall, with the collaboration and support of sponsors like the Beaufort Area Sports Council and many local Beaufort businesses (PortRoyalSoundFoundation.org/Inshore-Slam/). We are enthusiastic about the interest in this year's event, and confident that the tournament will continue to grow and draw people to Beaufort from around the region to participate in future years.

PRSF is proud to be a key tourist destination in Beaufort, and we take this role seriously. We strive to consistently provide a fun, educational, and dynamic experience for all visitors to the Maritime Center, while also ensuring that tourists to our area understand why Beaufort's environment is so unique and why we need to protect it. When tourists learn how to be better stewards of the places they visit, they benefit the local community by keeping our home clean. A healthy Port Royal Sound is critical to sustaining our tourism industry, economy, home values, jobs, and way of life for years to come.

E. Describe expected impact on tourism and tourism industry. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

Since opening in 2014, PRSF has welcomed over 228,000 visitors from all over the world. Over the past 10 years, PRSF has seen steady growth in visitor numbers, as well as the number of tourists we reach. 2023 was our busiest year yet with over 30,000 visitors to our campus. Since 2020, the percentage of visitors that travel to us from beyond 50-miles has been at or above 49%. Our methods of measuring this information is detailed in the next section.

PRSF has a variety of offerings for tourists, including our free Maritime Center museum and aquariums, an array of environmental education programs for children and adults, and beautiful waterfront event spaces that are available to rent. The School of Fish Exhibit will complement and enhance all of these offerings—Maritime Center visitors will appreciate the addition of this beautiful display as soon as they walk in the door, anglers will be drawn to participate in our Inshore Slam, and people will be excited to attend and host events in this unique event venue.

Our increased focus on digital advertising campaigns in 2025 will bring more tourists to our area to enjoy all we have to offer. From September 2023-August 2024, our digital advertisements had over 1,400,000 impressions outside of 50 miles on Facebook and Google Ads. Designated Marketing Areas (DMA) with the highest reach include Charlotte, Atlanta, New York City, Savannah, Washington D.C., Detroit, and Chicago. Many of our most-reached DMAs coincide with Beaufort CVB's top Visitor Market Areas. Our continued investment in marketing and collaboration with the CVB will expand our digital reach in the coming year.

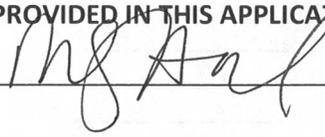
F. Describe how the effectiveness of the project in attracting tourists will be evaluated.

We are always improving our methods for capturing visitor information. We use tally counters to record the number of adults and children visiting the Maritime Center. For several years, we have

used individual paper visitor surveys to gather specific information about our visitors but starting in October, we plan to implement a digital sign-in process that will collect this information more efficiently and accurately in order to analyze our demographics and reach. We also record the number of participants in our programs and event attendees by a mix of online registrations and tally counts. Along with gathering information from visitors at the PRSF campus, we will continue to monitor our digital reach to analyze the potential new visitors we are reaching through online advertising.

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: 

Date: 9/11/24

Organization Name: Port Royal Sound Foundation

Project Name: School of Fish Exhibit for PRSF Maritime Center

Event/Project Revenue Projected	_____
Admissions Receipts	_____
Private Donations	<u>\$4,000</u>
City of Beaufort ATAX Requests	<u>\$9,500</u>
Beaufort County ATAX Requests	_____
Hilton Head ATAX Requests	_____
Town of Bluffton ATAX Requests	_____
Other Area ATAX Requests	_____

Total Revenues **\$13,500**

Expenses:

Sales Promotions Expenses	_____
Publicity Materials Expense	_____
Newspaper Advertising	_____
Radio Expense	_____
Magazine Expense	_____
Television Expense	_____
Billboard Advertising	_____
Printing	_____
Direct Mail Expenses	_____
Brochure Printing	_____
Flyer Printing	_____
Other Promotional Items	_____
Postage Supplies	_____
Equipment Rental	_____
Speaker Fees	_____
Entertainment Fees	_____
Hospitality Fees	_____
Hospitality Fees	_____
Decorations	_____
Refreshments	_____
Other Expenses (detail below)	_____
<u>3D Topics Exhibit Design,</u>	
<u>Production, and Install</u>	<u>\$13,500</u>

Total Expenses **\$13,500**

Total Request for ATAX Grant **\$9,500**

I Jody Hayward have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

Jody Hayward [Signature] 9/11/24
Printed Name Signature Date



3D Topics
 843 304 9299
www.3dtopics.com

Proposal

Name/Address
Port Royal Sound Foundation

	Terms	ShipDate	ShipVia	Project

Description	Qty		Cost
<p>Based on the information, we propose to make a school of 15 cobia fish to hang inside the museum. We will make 15 in total 18-30 inch cobia in different positions to guarantee the realism of the exhibit and hang with piano wire. Pricing includes all design, production and installation.</p> <p>Materials to be used: materials for 3d printer, fiberglass; paint with varnishes</p> <p>Thank you for your business.</p>	15		\$ 13,500.00

Phone#	E-mail	WebSite
(843) 304 9299	www.3dtopics.com	www.3dtopics.com

Organization Name: Port Royal Sound Foundation

Project Name: Reptile Display Exhibit

Event/Project Revenue Projected	_____
Admissions Receipts	_____
Private Donations— <i>Bargain Box</i>	\$10,000.00
City of Beaufort ATAX Requests	\$ 6,650.00
Port Royal ATAX Requests	_____
Hilton Head ATAX Requests	_____
Bluffton ATAX Requests	_____
Beaufort County ATAX Requests	_____
Other Area ATAX Requests	_____
Total Revenues	\$16,650.00

Expenses:

Sales Promotions Expenses	_____
Publicity Materials Expense	_____
Newspaper Advertising	_____
Radio Advertising	_____
Magazine Advertising	_____
Television Advertising	_____
Billboard Advertising	_____
Printing	_____
Direct Mail Expenses	_____
Brochure Printing	_____
Flyer Printing	_____
Other Promotional Items	_____
Postage Supplies	_____
Equipment Rental	_____
Service Rental	_____
Entertainment Fees	_____
Speaker Fees	_____
Hospitality Fees	_____
Decorations	_____
Refreshments	_____
Other Expenses (detail below)	
Reptile Enclosures	\$15,839.61
Tank Lights and Décor	\$ 827.00
-	_____

Total Expenses	\$16,666.61
Event Profit (Loss)	(\$ 16.61)
Total Request for Reimbursement	\$6,650

All supporting documentation must be maintained and immediately available upon request.

ACCOMMODATIONS TAX APPLICATION
FISCAL YEAR 2024/2025

CITY OF BEAUFORT



SC LOWCOUNTRY & RESORT ISLANDS TOURISM COMMISSION

PEACH MORRISON
EXECUTIVE DIRECTOR

1. Name of Applicant: **SC Lowcountry & Resort Islands Tourism Commission**
2. Mailing Address: **P. O. Box 615, Yemassee, SC 29945**
3. Project Director: **Peach Morrison**
 Project Treasurer or Administrative Official: **Commission Treasurer, Kendall Malphrus**
 Telephone #: **843.717.3090** Fax #: **843.717.2888**
 Email: Peach@SouthCarolinaLowcountry.com
4. Event or Project Name: **Promotion of the City of Beaufort and the SC Lowcountry**

List below any Accommodations Tax funding that you have previously been awarded from the City of Beaufort for this specific event or project: **None**

List Accommodations Tax funding that you have received in the previous years for other events or projects:

FY 2023/2024 \$47,029
FY 2022/2023 \$25,775
FY 2021/2022 \$15,000
FY 2020/2021 \$11,524
FY 2019/2020 \$15,000
FY 2018/2019 \$20,000
FY 2017/2018 \$15,000
FY 2016/2017 \$15,000

Additional funding information available upon request.

List any Accommodations Tax funds you have requested or received from other municipalities or counties for this proposed event or project:

State ATAX	6% Request	Approved
Beaufort County	\$93,300	TBD
Bluffton	\$66,700	TBD
Hilton Head Island	\$133,500	TBD
Edisto Beach	\$45,000	TBD
Walterboro	\$23,500	TBD
Hampton County	\$ 4,000	\$ 950
Jasper County	\$ 9,500	\$ 9,500
Hardeeville	\$20,400	TBD

We also applied and were approved for \$15,000 from Jasper County's Local Option ATAX

5. Date you will begin and complete work on your event or project: **July 1, 2024 to June 30, 2025**
6. Applicant Category (check all that apply):
 Non-profit organization registered with the Secretary of South Carolina
 Eleemosynary organization established under IRS Code 501 (c) 3, 4, 5, 6, 7, 10
 Other Non-profit organization
 Government or governmental agency
 For-profit organization
7. Federal Employee Identification number (EIN): **57-0941807**

8. Total Estimated Costs of the Proposed Event or Project: **\$898,000**
 Accommodation Tax Requested: **\$61,800 (6% of funds received per most recent DoR Report)**
 Project Funding from Other Sources: **\$836,200**
9. Source of Applicant's Other Funds: **We are funded through ATAX Grants from the counties and municipalities we serve in the four county Lowcountry region, through the Tourism Advertising Grant program via SC PRT, through the SC Legislature via SC PRT, through the South Carolina Association of Tourism Regions and through sales and donations at our Visitors Center at the Frampton Plantation.**
10. What is the anticipated total attendance for your event: **In FY 2023/2024, we were in direct contact with 49,948 guests and visitors who have requested our printed materials: 28,598 Guidebooks distributed + 8,500 Attractions Brochures distributed + 12,850 Guests at the Visitors Center. This is a 11.7% decrease in this number set from last year. The decrease was primarily seen in the bulk distribution of our Guidebook. Last year we shipped 19,117 copies of our guidebook to the Savannah Airport, Welcome Centers around the State and to several AAA Offices in the Northeast and Midwest. This past fiscal year we only shipped out 17,680 copies which is a 8% decrease. The Savannah Airport will no longer stock our Guidebooks due to the ad on the back cover featuring the Hilton Head Airport. Foot traffic was up slightly (2.2%).**

Our online presence touched 635,058 digital viewers (at least once): 512,819 Web sessions down 4.1% from the previous year) + 67,873 vetted and active Constant Contact email recipients (up 17.6% from the previous year) + 48,363 Facebook likes (up 21.2% from the previous year) + 1,615 Twitter followers (flat compared to the previous year) + 4,043 Instagram followers (up 26.0% from the previous year). This is flat compared to last year, but we feel the migration to G4 in Google Analytics was the reason here because there was a change in how Google was measuring these numbers. This does not include our followers on Pinterest or YouTube to keep the comparison in numbers true to the past formula. However, our Pinterest campaign reported 9,290 clicks to our website (up 31% over last year) and our 3 YouTube Campaigns (Action, Targeting and Retargeting) received 367,520 Video views (up in all three campaigns over last year. The top 6 metros are New York, NY, Philadelphia, PA, Atlanta, GA, Charlotte, NC, Chicago, IL and Baltimore, MD. This audience is 56% male and skews younger than our social channels. 62% of our Pinterest followers are female and interestingly, almost half of our audience is in the age group is 25-44 (41.6%). We conducted a Pinterest campaign this year through Compass Media which yielded great results. We continue to promote our YouTube channel and have 345 subscribers, which is a 68% increase from last year. Our YouTube Action, Targeting and Retargeting campaigns have produced double digit increase in clicks, views and engagement.

49,948 + 635,058 = 685,006. This is 1.3% lower than the total "attendance" from last year, measured the exact same way as always. We did not achieve our goal to increase these numbers this year but our gains in attendance the last five years have averaged an increase of 29% and we knew that would be extremely hard to maintain. We also invested \$60,000 of marketing dollars in research to better market our region for the future. Our goal for this year will be to increase attendance by 10% by using the Symphony dashboard and our new Visitor Profile Study to optimize each of campaigns and platforms in the marketing mix to increase visitation, particularly through our website SEO and digital marketing during FY 2024/2025.

Total "tourist" anticipated: **While some of our social media followers are in the four-county region, the vast majority of dollars spent in our marketing efforts are in placements far beyond the 50-mile radius. Therefore, we consider all these potential guests as "tourists".**

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain the collaboration: **We work hand-in-hand with all the local tourism entities and tourism-related businesses. The tourism-related businesses have free listings in the Lowcountry Guidebook and on our website. We promote Beaufort tourism related businesses and events at the Frampton**

Plantation House Visitors Center, in the Lowcountry Guidebook, on our website, in our biweekly Events E-newsletter and social media outlets free of charge. The DMO’s “sub-brands” of history & culture, events & festivals, the Arts and outdoor recreation are in complete synchronization with our own.

Robb Wells, Director of the Greater Beaufort-Port Royal CVB, is the current Chair of our Commission and serves as the Marketing Committee Chair the past seven fiscal years. We make it a point to ensure that our marketing efforts are placed in outlets that are not utilized by the Greater Beaufort Convention and Visitors Bureau to fill a void without duplication. We will continue to work collaboratively with the City of Beaufort’s DMO in upcoming ad placement and scheduling in print and digital media, as well with our other partners in the region.

We also work with partners in southern Beaufort County, Colleton, Hampton and Jasper Counties. As we do with Robb at the Greater Beaufort-Port Royal CVB, we collaborate with all our Commissioners from each of the respective regional municipalities to avoid duplication of efforts and to ensure that we are all working together to promote the Lowcountry Region.

12. Provide the information below in an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed.

BUDGET
FY 2024-
2025

Income	
Gift Shop	
Retail Sales	55,000.00
Total Gift Shop Income	55,000.00
	55,000.00
Tourism Commission	
Bank	
Interest	10,000.00
Local ATAX	150,000.00
Local HTAX	15,000.00
State Appropriation	420,000.00
State ATAX	200,000.00
TAG 24-25	45,000.00
Total Tourism Comm	840,000.00
	840,000.00
Visitors Center & Museum	
Donations	3,000.00
Total VC & M	3,000.00
	3,000.00

TOTAL INCOME**898,000.00**

**See Note

Expense**Gift Shop**

Consignments	2,500.00	
Credit Card Charges	1,800.00	
Misc	1,500.00	
Retail Merchandise	27,000.00	
Total Gift Shop	32,800.00	32,800.00

Tourism Commission

Direct Marketing

Billboards	43,000.00
Conversion Study	5,000.00
Creative/Content Generation	10,000.00
Digital Advertising	260,000.00
E_Newsletters	13,000.00
FAM Trips	12,000.00
Inquiry Postage	19,500.00
Print Advertising	46,000.00
Printed Materials	50,000.00
SCATR RevWar Mkt Project	5,000.00
Travel Shows	5,000.00
Website Maintenance	9,000.00

Indirect Marketing

Computer Software	1,200.00
National Tourism Week	500.00
SCATR Co-op	7,000.00
Telephone	5,800.00
Travel/Registration/PerDiem	12,000.00

Alarm

System	300.00
Annual Audit	15,000.00
Auto Insurance	1,200.00
Contingency	1,000.00
December Annual Meeting	1,000.00
Dues & Subscriptions	2,000.00
Electricity	4,500.00
Employee Appreciation	1,000.00
Equipment & Maintenance Contracts	1,500.00
Exterminating	250.00
Misc	1,000.00

Office Postage	500.00	
Office Supplies	2,500.00	
Office_Building Ins	15,000.00	
Payroll Taxes & Expenses		
FT Med Benefits	20,000.00	
FT Pensions	11,000.00	
Taxes (SUTA, MCARE & SS)	15,000.00	
Salary & Wages		
Dir Admin/Online Content	47,840.00	
Cintract Accountant	25,000.00	
Executive Director	85,410.00	
Sponsorships	5,000.00	
Trash Removal	900.00	
Water Bill	300.00	
	<u>761,200.00</u>	<u>761,200.00</u>

Total Tourism Commission

Visitors Center

Alarm		
System	300.00	
Building Insurance	2,500.00	
Building, Fencing, Upkeep	2,000.00	
Cleaning Supplies	550.00	
Contingency	1,000.00	
Contract Grounds Maintenance	4,500.00	
Contract Labor	450.00	
Electricity	4,000.00	
Exterminating	600.00	
Frampton Events	2,000.00	
Groundskeeping Supplies	500.00	
Landscaping	650.00	
Misc.	1,000.00	
Museum Exhibits	100.00	
Salary & Wages		
Part Time Weekend Staff	27,500.00	
Visitors Center Manager	45,000.00	
Signage	10,000.00	
Trash Removal	900.00	
Water Bill	450.00	
	<u>104,000.00</u>	<u>104,000.00</u>

TOTAL EXPENSES

898,000.00

**See Note
Below

** - We could get an additional \$40,000 in non-recurring from the Legislature

This budget was approved by the Commission's Board of Directors on June 18, 2024.

Please note, this budget was approved before we knew that the SC Association of Tourism Regions (SCATR), of which we are one of 11 that cover the state, was approved to receive an additional \$30,000 in non-recurring funds for FY 2024/2025. Our Commission Board approved this budget with the caveat that any additional funding that we may get from the Legislature would be used in marketing and research efforts.

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. The Tourism Development Advisory Committee must know specifically how you intend to spend your award.

We intend to use the City's ATAX Grant, if awarded, towards our expenditures within our Direct Marketing budget which includes Compass Media (\$160,000), Google Display Ads (\$36,000), SC Parks Recreation & Tourism's Co-Op Advertising Opportunities (\$27,000) and E-Newsletter Content and Distribution (\$10,000). We also have other Direct Marketing expenditures in a hybrid of Print/Digital Advertising (\$46,000), Website SEO (\$9,000) and FAM trips (\$12,000) to name a few.

We started working with Compass Media in FY 16/17 with a Facebook campaign which achieved excellent results. We have contracted with them to work with us in a Search Engine Campaign, a Retargeting Campaign and a campaign focusing on Google Ad Words. We also have paid social media campaigns with them through Facebook, Pinterest and YouTube. Last Year, our Google Ads Campaign search CTR (click through rate) is performing 64% higher than the industry average and our Google display campaign CTR is performing 363% higher than the industry average. Combined, our campaigns through Compass Media delivered 329,980 clicks to our website, 864,922 video views, 1,080 phone calls for more information, 6,524 conversions and 5,774 lead forms.

The Co-op advertising through SC PRT is an opportunity to team up with the state for economies of scale to work with their partners. We also have digital ads on their website. Our top performer last fiscal year was an ad we placed on the "Park Finder" page of their State Parks site. We are also partnering with them on sites like Trip Advisor, iHeart Radio and on their social media platforms to strengthen our own social media outlets, especially with Facebook and Instagram.

In the past, we did a bi-weekly events newsletter through Constant Contact. They have now morphed into including more content featuring the history, culture, the arts and natural resource offerings that are available in our area. We are currently sending bi-monthly information out to over 68,000 vetted subscribers.

As an example of the hybrid print/digital advertising we do, we will again purchase a half page ad in SC PRT's Discover SC Guidebook. The leads generated from this print ad and the digital version of their guidebook on the DiscoverSouthCarolina.com have historically been in the top three lead generators for requests for our Lowcountry Guidebook.

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

The SC Lowcountry & Resort Islands Tourism Commission was created by an Act of the South Carolina General Assembly and was signed into State Law by the Governor of South Carolina in April of 1991. Our mission is to promote the economic development of the Region through a formal program of tourism promotion in Beaufort, Colleton, Hampton and Jasper Counties. Our project is to fulfill this mission by increasing awareness of the City of Beaufort as THE destination of choice for leisure travel.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

This project, the promotion of the City of Beaufort and the Lowcountry region, is our organization's reason for existence. We are charged with keeping an up-to-date inventory of tourism product offerings in the City of Beaufort and throughout the Lowcountry. We do this at no charge to those entities on our website, in the Lowcountry Guidebook and across our multi-platform social media outlets. We are bound by law to use a formal program of tourism promotion to market Beaufort and the rest of our four-county region, which is in direct compliance with accommodation tax grant funding. We use monthly reports to measure the response to our traditional print and digital advertising investments.

The Commission benefits tourism in the City of Beaufort and her surrounding area through global advertising, personal contact and national & international distribution of promotional literature about the area. We also advertise events and attractions in our region, particularly through our events newsletter in an effort to maximize all the resources and products which are unique to Beaufort. The Commission also serves as a local fulfillment agency – responding to requests generated by advertising placed by both SCPRT and the Commission for travel & tourism information.

The Lowcountry Visitors Center, at the Frampton Plantation House at Exit 33 off Interstate 95, provides personal assistance and information to travelers and vacationers. We encourage tourists to visit our communities, museums and historical, cultural and natural attractions and assets. We provide information to potential City of Beaufort visitors via our website, social media outlets, via telephone and in person in our visitors center, seven days a week, year-round. According to SC Department of Transportation, in the latest count on their website, 58,800 vehicles per day pass exit 33 on I-95 and 10,900 vehicles pass our driveway on Highway 17.

Specifically, those who benefit from our labors include hoteliers, restaurant owners, tour operators, nature outfitters, shop owners and other tourism-related businesses who receive complimentary listings in our guidebook and on our website, including live links to their sites. Our efforts offer Beaufort wider exposure, attraction of more visitors needing accommodations and services – thereby creating more jobs, as well as increased sales and revenues. Those in tertiary businesses, as in the banking and medical industries for example, also benefit from our touring guests during vacation stays, which can sway relocation decisions. There are many benefits to the entire citizenship of the City of Beaufort by way of taxes paid by our out-of-town guests and in increased quality of life experienced in Beaufort through our local events, offerings and festivals.

In the current climate, it is vital that we continue to keep the City of Beaufort and the rest of the Lowcountry “top of mind” to potential guests by promoting our tourism assets and our way of life in wide open natural areas filled with Naturally Amazing things to see, learn and do so that we can assist in putting heads in beds, forks on the table, tourists on tours and feet in the fairways. Market share competition has increased significantly over the last several months with the return of international travelers and travel to more urban locations. I continue to believe that it is high time that others really acknowledge how large an economic driver our industry is, from employment to revenues to taxes and ultimately, to the quality of life for our residents.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a “percentage of tourism” basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

We contracted with Gray Research to do a Visitor Profile Study for us a few months back. Although some of the qualitative information is still being worked on, the quantitative research is complete. The profile was centered around email addresses of people that had engaged with us in some way. We did that to research where people were going, what they were doing and where they were staying. We also asked questions to try to find out what they liked most, if there was something they learned that would inspire them to return and why they chose our region as their

destination of choice. Gray Research also used the data in the Symphony Research Dashboard to compare these visitors to people who had not interacted with our SC Lowcountry Tourism Commission resources (website, social media, E-newsletters, etc), It was a very thorough project.

The main quantitative results with respect to this question is that visitors who reported being influenced to spend or do more using Lowcountry resources spent more money (\$408.00 vs \$308.00 per day) and stayed longer (5.2 days vs 4.2) and did more activities (7.8 vs 6.6). The net average spend was \$1,803.00. To be conservative, I will use that number. In calculating the following numbers, we used a conversion rate of 55% from our previous research.

By using the number of Guidebooks and Attractions Brochures requested from our office in FY 23/24, we can conclude that our Commission produces a direct expenditure \$36,788,232 from the trips taken by those who receive that collateral.

$37,098 \text{ Collateral Pieces} \times 55\% \text{ visits to the SC Lowcountry} = 20,404$

$24,074 \text{ visits} \times \$1,803 \text{ average spend during vacation} = \$36,788,232$

This figure is direct impact only. It does not include indirect revenue created by our local citizens who are employed by the tourism industry, by the vendors who supply goods to the industry or sales tax or hospitality taxes which are collected from those visiting guests.

This figure is quite conservative because it does not include those visitors who do not request our guidebook but download our information from our website or through digital and social media outlets. That number can be highly subjective but is very powerful since the number of collateral pieces is only 5.4% of our total attendance (including digital and social media outlets. There are several discussions in our tourism research community about how best to calculate conversion rates from website sessions and social media engagement, but no true generalization has been developed that I feel comfortable using.

With respect to the City of Beaufort's piece of the economic impact of our results, we calculate that we will have brought 76,392 room nights to Beaufort in FY 23/24 year. Beaufort was reported as the destination of the traveler in 72% of those completing the survey, the highest ranked destination in the region. With 37,098 Guidebooks and brochures dispersed and 55% making a trip to the Lowcountry, that gives us 20,404 visiting parties. Of that, 72% reported Beaufort as their destination – 14,691 visiting parties staying an average of 5.2 nights = 76,392 room nights. Again, this does NOT include those receiving our information via our web site, events newsletter, attractions brochure or social media outlets.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated.

We will continue to measure our effectiveness through ongoing conversion studies, our monthly reports which determine ROI respective to media outlets, through collaboration with the Greater Beaufort-Port Royal CVB, in guest profile studies and in conjunction with our partners in other parts of Beaufort County and our partners in the remaining three counties that we serve. Our monthly reports track response to advertising across all platforms, guests that stop at the Frampton Plantation House, website traffic through Google Analytics and other tracking reports in Facebook, Constant Contact, Instagram, YouTube, Pinterest and Twitter.

We have monthly performance analysis meetings with our team at Compass Media and we go through each ad placement so that we ensure maximum reach for our ROI. We also meet monthly with our website team at Advyon to ensure critical links are maintained and fine-tuned and that the efforts they are making in Search Engine Optimization are in sync with the efforts of our team at Compass Media.

We also use the tools provided through SC Parks, Recreation and Tourism, the Southeastern Tourism Society and the Travel and Tourism Research Association to keep abreast of the newest technology, upcoming trends and ever-

changing ways to better reach our target market and influence travelers to choose Beaufort as their next destination. One thing that the pandemic did for the Tourism Industry was that it created new opportunities for more freely shared information from major research organizations like Destination Analysts, Longwoods International, the tourism and travel research company, MMGY and US Travel. We also attended a myriad of webinars from Miles Media, Simpleview, JB Media, Gray Research, Advance Travel, Madden Media, Arrivalist, MNI Media, Sojern, CrowdRiff and Magellan Strategies. These National collaborations have been invaluable in maximizing ROI, learning about new "Best Practices" and networking with colleagues in South Carolina, the Southeast and all over the United States.

The draft of our new Visitor Profile Study has just been presented to the executive core and after a few minor revisions and presentation to our full Commission Board, we will share the information we have learned with all our partners. We are still tweaking the Symphony Research dashboard we purchased a few months ago through Oxford Economics. It uses pixels added to our digital ads to follow visitors as they move through our region. It also includes geolocation data which tracks how people move through our region through anonymous cell phone data and tracks industry and credit card spend data.

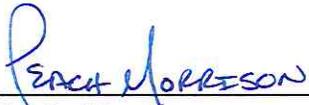
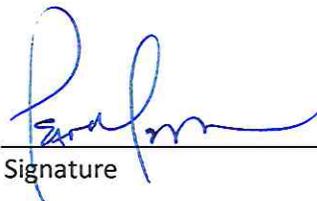
We would like to thank the Committee for all your hard work in this process and we are grateful to you and City Council for your support in the past.

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director:  Date: 9/13/24

I,  have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism", and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2024 Accommodations Tax Funds.

 Printed Name  Signature 9/13/24 Date

2024-25 ATAX REVENUE & EXPENSE BUDGET

<u>Event/Project Projected Revenues</u>	
Admission Receipts	
Private Donations	3,000
City of Beaufort ATAX Request	61,800
Beaufort County TAX Request	93,300
Hilton Head ATAX Request	133,500
Town of Bluffton ATAX Request	66,700
Other Area ATAC Request(s)	114,350
Total Revenues	898,000
<u>Event/Project Projected Expenses</u>	
Sales Promotional Expenses	
Publicity Materials Expense (Content (Reason))	10,000
Newspaper Advertising	
Radio Expense	
Magazine Expense / PRINTED ADV	46,000
Television Expense	
Billboard Advertising	43,000
Printing	
Direct Mail Expenses	19,500
Brochure Printing	50,000
Flyer Printing	
Other Promotional Items	
Postage Supplies	500
Equipment Rental	1,500
Speaker Fees	
Entertainment Fees	
Hospitality Fees	
Decorations	
Refreshments	
Other Expenses (Detail Below)	335,000
Total Projected Revenues	898,000
Event/Project Projected Profit or Loss	0

DIGITAL MARKETING 260,000
 E NEWSLETTERS 13,000
 FAM TOURS 12,000
 SCATR CO-OP 7,000
 RENWAL MKTG 5,000
 TRAVEL SHOWS 5,000
 WEBSITE MAINTENANCE 9,000
 TRAVEL/REGISTRATION FEES 12,500

RESEARCH 5,000
 SOFTWARE 12,000
 TELEPHONE 5,800

 \$ 335,000

Lowcountry Tourism Commission
Profit & Loss Budget Performance
July 2023 through June 2024

	<u>Jul '23 - Jun 24</u>	<u>Budget</u>	<u>YTD Budget</u>	<u>Annual Budget</u>
Ordinary Income/Expense				
Income				
Gift Shop				
Retail Sales	55,444.76	55,000.00	55,000.00	55,000.00
Total Gift Shop	<u>55,444.76</u>	<u>55,000.00</u>	<u>55,000.00</u>	<u>55,000.00</u>
Tourism Commission				
Bank Interest/Savings	40.49	4,500.00	4,500.00	4,500.00
Local ATAX	111,150.00	100,000.00	100,000.00	100,000.00
Local H Tax	14,000.00	14,000.00	14,000.00	14,000.00
State Appropriation	547,272.68	470,455.00	470,455.00	470,455.00
State ATAX	208,971.37	190,000.00	190,000.00	190,000.00
TAG 18/19	19,534.24	45,000.00	45,000.00	45,000.00
Total Tourism Commission	<u>900,968.78</u>	<u>823,955.00</u>	<u>823,955.00</u>	<u>823,955.00</u>
Visitors Center				
Donations	3,585.00	2,500.00	2,500.00	2,500.00
Total Visitors Center	<u>3,585.00</u>	<u>2,500.00</u>	<u>2,500.00</u>	<u>2,500.00</u>
Over/Short	<u>-93.55</u>			
Total Income	<u>959,904.99</u>	<u>881,455.00</u>	<u>881,455.00</u>	<u>881,455.00</u>
Cost of Goods Sold				
5000 - Cost of Goods Sold	25,901.80			
Total COGS	<u>25,901.80</u>			
Gross Profit	<u>934,003.19</u>	<u>881,455.00</u>	<u>881,455.00</u>	<u>881,455.00</u>
Expense				
Gift Shop Expense				
Consignments	1,827.97	2,500.00	2,500.00	2,500.00
Credit Card Charges	1,593.05	1,800.00	1,800.00	1,800.00
Misc.	1,148.78	1,500.00	1,500.00	1,500.00
Retail Merchandise	22,857.34	27,000.00	27,000.00	27,000.00
Total Gift Shop Expense	<u>27,427.14</u>	<u>32,800.00</u>	<u>32,800.00</u>	<u>32,800.00</u>
Tourism Commission Expense				
1 Direct Marketing				
Billboards	34,840.00	43,000.00	43,000.00	43,000.00
Conversion Study	80,897.00	50,250.00	50,250.00	50,250.00
Creative/Content Generation	11,764.89	15,000.00	15,000.00	15,000.00
Digital Advertising	258,257.55	265,000.00	265,000.00	265,000.00
E Newsletters	12,823.47	12,500.00	12,500.00	12,500.00
FAM Trips	4,786.25	15,000.00	15,000.00	15,000.00
Inquiry Postage	20,053.40	18,000.00	18,000.00	18,000.00
Print Advertising	39,743.00	69,072.00	69,072.00	69,072.00
Printed Materials	23,514.95	6,000.00	6,000.00	6,000.00
SCATR Direct Adv	5,000.00	5,000.00	5,000.00	5,000.00
Travel Shows	4,140.28	3,000.00	3,000.00	3,000.00

Lowcountry Tourism Commission
Profit & Loss Budget Performance
July 2023 through June 2024

	Jul '23 - Jun 24	Budget	YTD Budget	Annual Budget
Website Maintenance	7,603.18	9,000.00	9,000.00	9,000.00
Total 1 Direct Marketing	503,423.97	510,822.00	510,822.00	510,822.00
2 Indirect Marketing				
Computer Software	1,089.43	1,250.00	1,250.00	1,250.00
National Tourism Week	176.29	500.00	500.00	500.00
SCATR Co-op	7,337.31	7,000.00	7,000.00	7,000.00
Telephone	4,644.85	5,200.00	5,200.00	5,200.00
Travel/Reg/PerDiem	12,183.26	10,000.00	10,000.00	10,000.00
Total 2 Indirect Marketing	25,431.14	23,950.00	23,950.00	23,950.00
Alarm System	252.36	300.00	300.00	300.00
Annual Audit & Payroll Service	7,780.48	10,000.00	10,000.00	10,000.00
Auto Insurance	587.37	1,200.00	1,200.00	1,200.00
Contingency	1,435.15	1,000.00	1,000.00	1,000.00
December Annual Meeting	317.83	1,000.00	1,000.00	1,000.00
Dues & Subscriptions	1,099.60	2,000.00	2,000.00	2,000.00
Electricity	3,482.54	4,000.00	4,000.00	4,000.00
Employee Appreciation	830.86	1,000.00	1,000.00	1,000.00
Equipment/ Maintenance Contract	3,515.44	1,200.00	1,200.00	1,200.00
Exterminating	507.50	250.00	250.00	250.00
Misc.	643.43	1,000.00	1,000.00	1,000.00
Office Postage	261.12	500.00	500.00	500.00
Office Supplies	1,770.27	2,500.00	2,500.00	2,500.00
Office/Building Insurance	12,110.98	15,000.00	15,000.00	15,000.00
Payroll Taxes & Expenses				
FT Med. Benefits	20,239.54	17,926.00	17,926.00	17,926.00
FT Pension	11,593.08	12,417.00	12,417.00	12,417.00
Taxes - SUTA	53.81			
Taxes MCARE & SS (Co)	15,063.66	12,000.00	12,000.00	12,000.00
Payroll Taxes & Expenses - Other	41.10			
Total Payroll Taxes & Expenses	46,991.19	42,343.00	42,343.00	42,343.00
Salary & Wages (Gross)				
Dir Admin/Online Content	46,807.89	45,990.00	45,990.00	45,990.00
Executive Director Salary	81,850.87	82,125.00	82,125.00	82,125.00
Office Assistant (Salaried)	0.00	0.00	0.00	0.00
Part-Time Weekend Staff	21,842.44	0.00	0.00	0.00
Visitors Center Mgr.	51,389.57	0.00	0.00	0.00
Total Salary & Wages (Gross)	201,890.77	128,115.00	128,115.00	128,115.00
Sponsorships	5,148.60	4,000.00	4,000.00	4,000.00
Trash Removal	789.72	900.00	900.00	900.00
Water Bill	198.86	300.00	300.00	300.00
Total Tourism Commission Expense	818,469.18	751,380.00	751,380.00	751,380.00
Visitors Center Expense				

Lowcountry Tourism Commission
Profit & Loss Budget Performance
 July 2023 through June 2024

	<u>Jul '23 - Jun 24</u>	<u>Budget</u>	<u>YTD Budget</u>	<u>Annual Budget</u>
Alarm System	252.24	300.00	300.00	300.00
Building Insurance	2,250.00	2,250.00	2,250.00	2,250.00
Building, Fencing, Upkeep	11,743.18	2,000.00	2,000.00	2,000.00
Cleaning Supplies	546.41	500.00	500.00	500.00
Contingency	685.00	1,000.00	1,000.00	1,000.00
Contract Grounds Maintenance	3,862.32	4,500.00	4,500.00	4,500.00
Contract Labor	178.36	500.00	500.00	500.00
Electricity	3,482.57	4,000.00	4,000.00	4,000.00
Exterminating	912.50	250.00	250.00	250.00
Frampton Events	1,404.66	2,000.00	2,000.00	2,000.00
Groundskeeping Supplies	89.63	500.00	500.00	500.00
Landscaping	1,700.00	500.00	500.00	500.00
Misc.	274.96	1,000.00	1,000.00	1,000.00
Museum Exhibits	0.00	100.00	100.00	100.00
Salaries & Wages (Gross)				
Part-Time Weekend Staff	0.00	26,250.00	26,250.00	26,250.00
Visitors Center Mgr.	0.00	49,275.00	49,275.00	49,275.00
Total Salaries & Wages (Gross)	<u>0.00</u>	<u>75,525.00</u>	<u>75,525.00</u>	<u>75,525.00</u>
Signage	0.00	1,000.00	1,000.00	1,000.00
Trash Removal	789.72	900.00	900.00	900.00
Water Bill	397.78	450.00	450.00	450.00
Total Visitors Center Expense	<u>28,569.33</u>	<u>97,275.00</u>	<u>97,275.00</u>	<u>97,275.00</u>
Total Expense	<u>874,465.65</u>	<u>881,455.00</u>	<u>881,455.00</u>	<u>881,455.00</u>
Net Ordinary Income	59,537.54	0.00	0.00	0.00
Other Income/Expense				
Other Income				
Bank Interest (CD Account)	9,150.41			
Bank Interest (New Build Acct)	1,282.30			
Total Other Income	<u>10,432.71</u>			
Net Other Income	<u>10,432.71</u>	0.00	0.00	0.00
Net Income	<u><u>69,970.25</u></u>	<u><u>0.00</u></u>	<u><u>0.00</u></u>	<u><u>0.00</u></u>

Lowcountry Tourism Commission
Summary Balance Sheet
As of June 30, 2024

	<u>Jun 30, 24</u>
ASSETS	
Current Assets	
Checking/Savings	587,486.83
Other Current Assets	<u>-4,823.24</u>
Total Current Assets	582,663.59
Fixed Assets	<u>381,960.13</u>
TOTAL ASSETS	<u>964,623.72</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	<u>25,346.69</u>
Total Current Liabilities	<u>25,346.69</u>
Total Liabilities	25,346.69
Equity	<u>939,277.03</u>
TOTAL LIABILITIES & EQUITY	<u>964,623.72</u>

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: Tabernacle Baptist Church
2. Mailing Address: PO Box 1564 City Beaufort State SC Postal Code 29901
3. Project Director: Kenneth F. Hodges
- Project Treasurer or Administrative Official: Barbara Glaze
- Telephone #: (843)441-1628 Email: lybensons@aol.com
4. Event or Project Name: Harriet Tubman Monument/162nd Anniversary of Combahee River Raid/HTM Dedication

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

City of Beaufort ATAX

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

No Funds Prreviously Awarded

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

Beaufort County 3% ATAX

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 6/2024 - End – Month/Year 6/2024

Note: Event or project must be completed within 12 months from date of award.

*6/2024 - 6/2025
6/2016 - 6/2024
corrected by phone with
Rev. Hodges 10/17/24*

6. Applicant Category (check all that apply)

- Non-profit organization registered with the Secretary of South Carolina
- Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10
- Other Non-profit organization
- Government or governmental agency
- For-profit organization

7. Federal Employee Identification number (EIN): 57-101051-9

8. Total Estimated Costs of the Proposed Event or Project: \$ 550,000.00

Accommodation Tax Funds Requested: \$ 28,500.00

Project Funding from Other Sources: \$ 521,500.00

9. Source of Applicant's Other Funds: 60% already raised from private sector, \$250,000, from County 3% ATAX
balance will be raised from private sector

*\$250,000 by phone
11/17/24*

10. What is the anticipated total attendance for your event? 4,000

Total "tourist" anticipated? 2,000

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

The CVB will execute the marketing/Advertising of the event as a partner, NPS conducts tours on an ongoing basis promoting the HTM

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: Kenneth F. Hodges

Date: 9/13/24

2024-25 ATAX REVENUE & EXPENSE BUDGET

Event/Project Projected Revenues	
Admission Receipts	
Private Donations	
City of Beaufort ATAX Request	\$28,500.00
Beaufort County TAX Request	
Hilton Head ATAX Request	
Town of Bluffton ATAX Request	
Other Area ATAC Request(s)	
Total Revenues	\$28,500.00
Event/Project Projected Expenses	
Sales Promotional Expenses	
Publicity Materials Expense	\$2,500.00
Newspaper Advertising	\$1,000.00
Radio Expense	\$1,000.00
Magazine Expense	
Television Expense	
Billboard Advertising	
Printing	\$2,500.00
Direct Mail Expenses	\$1,500.00
Brochure Printing	\$2,000.00
Flyer Printing	\$500.00
Other Promotional Items	
Postage Supplies	
Equipment Rental	
Speaker Fees	
Entertainment Fees	
Hospitality Fees	
Decorations	
Refreshments	
Other Expenses (Detail Below)	\$7,000.00
<small>Digital/social media</small>	
Total Projected Revenues	
Event/Project Projected Profit or Loss	\$28,500.00

Other Expenses;
 Creation of educational panels & Displays \$10,500.00

Return to: **CITY OF BEAUFORT**
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Kenneth F, Hodges have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

<u>Kenneth F, Hodges</u>	<u><i>Kenneth F. Hodges</i></u>	<u>09/13/24</u>
Printed Name	Signature	Date

CITY OF BEAUFORT ACCOMODATIONS TAX GRANT

ATTACHMENT; TABERNACLE BAPTIST CHURCH FUNDING REQUEST

C. A summary description of the proposed event or project.

Tabernacle Baptist Church launched a campaign to honor Harriet Tubman with a monument for her services in Beaufort during the Civil War and for her role in the Combahee River Raid in June of 1863. The monument was unveiled on June 1, 2024.

June of 2025 marks the 162nd Anniversary of the Combahee River Raid. Tabernacle launched an Inaugural Event to celebrate Harriet Tubman and the Combahee River Raid to be held annually.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

The Tabernacle Baptist Church building has existed on Craven Street in Beaufort since 1811.

The Tabernacle Baptist Church was home to a school during the Civil War and held an Emancipation Day service on January 1, 1863. It's members served as community leaders in Reconstruction era Beaufort, and today is the final resting place of Congressman Robert Smalls. Tabernacle Baptist Church is a part of the Reconstruction Era National Historic Network and the National Park Service Underground Railroad Network to Freedom.

The Harriet Tubman Monument and events celebrating Harriet Tubman and the Combahee River Raid has proved to be beneficial to Beaufort, Beaufort County, South Carolina, and the Tourism Industry.



HARRIET TUBMAN *Unveiling*

SATURDAY, JUNE 1, 1:00 PM

Special Guest Presenters

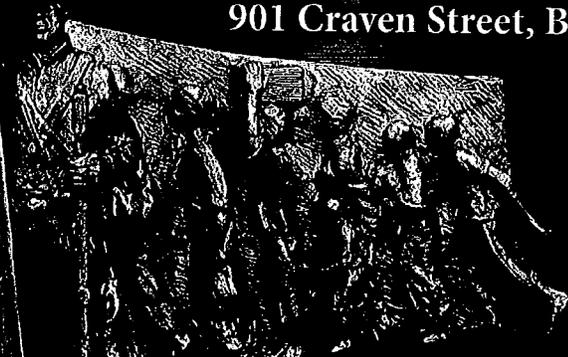
Tabernacle Baptist Church

901 Craven Street, Beaufort, SC

HARRIET TUBMAN

Memorial to Her Services Rendered
in Beaufort, South Carolina, during the Civil War
and to Her Leadership and Courage
at the Combahee River Raid 1863

Ed Dwight - Sculptor



EVENTS

Friday, May 31
through
Sunday, June 2

FRIDAY, MAY 31

6:00 to 8:00 PM

Dr. Eddin Fields-Brock,

author

COMBEE: Harriet Tubman and

Freedom Seekers

Book Talk and Book signing

SATURDAY, JUNE 1

A Taste From

Harriet Tubman

"Eating House"

Top Food vendors

SUNDAY, JUNE 2

10:00 AM

Worship

2:00 PM

Lurenda Carr, actress

One Woman Show

Harriet Tubman,

My Life Not My Own

FY 2024 Accommodations Tax Funding Final Report

Organization Name: Tabernacle Baptist Church

Project Name: Harriet Tubman Monument 160th Anniversary of Combahee River Raid

Event/Project Revenue Projected	_____
Admissions Receipts	_____
Private Donations	_____
City of Beaufort ATAX Requests	<u>\$ 10,000</u>
Port Royal ATAX Requests	_____
Hilton Head ATAX Requests	_____
Bluffton ATAX Requests	_____
Beaufort County ATAX Requests	_____
Other Area ATAX Requests	_____
Total Revenues	<u>\$ 10,000</u>

Expenses:

Sales Promotions Expenses	_____
Publicity Materials Expense	<u>\$ 1,103.75</u>
Newspaper Advertising	_____
Radio Advertising	_____
Magazine Advertising	_____
Television Advertising	_____
Billboard Advertising	_____
Printing	_____
Direct Mail Expenses	_____
Brochure Printing	_____
Flyer Printing	_____
Other Promotional Items	_____
Postage Supplies	_____
Equipment Rental	_____
Service Rental	_____
Entertainment Fees	_____
Speaker Fees	_____
Hospitality Fees	_____
Decorations	_____
Refreshments	_____
Other Expenses (detail below)	_____
<u>Digital/Social Media Advertising</u>	<u>\$ 9,150</u>
Total Expenses	<u>\$ 10,253.75</u>
Event Profit (Loss) Total Request for ATAX Grant	<u>- 253.75</u>

Total Request for Reimbursement \$ 10,000

All supporting documentation must be maintained and immediately available upon request.

CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

A separate application is required for each event or project for which funding is requested.

1. Name of Organization: The Original Gullah Festival of South Carolina, Inc.

2. Mailing Address: P.O. Box 83 City Beaufort State SC Postal Code 29901

3. Project Director: Mr. Thomas Roy Hicks, II

Project Treasurer or Administrative Official: Reba Pazant, treasurer and Denise Bullitt, strategist

Telephone #: 404-718-9221/ 843-593-0904 Email: rdpazant@yahoo.com/ sankofainspirit@gmail.com

4. Event or Project Name: 2025 Original Gullah Festival

List below any Accommodations Tax funding that has previously been awarded from the City of Beaufort for this specific event or project.

2024 Award \$33,825

List Accommodations Tax funding that has previously been awarded from the City of Beaufort for other events or projects.

N/A

List any Accommodations Tax funds that has previously been awarded from other municipalities or counties for this proposed event or project.

For 2024: Beaufort County award share \$17,500; None, thus far awarded for 2025.

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 10/1/2024 End – Month/Year 7/25

Note: Event or project must be completed within 12 months from date of award.

6. Applicant Category (check all that apply)

Non-profit organization registered with the Secretary of South Carolina

Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10

Other Non-profit organization

Government or governmental agency

For-profit organization

7. Federal Employee Identification number (EIN): 57-0837939

8. Total Estimated Costs of the Proposed Event or Project: \$ \$195,500

city Accommodation Tax Funds Requested: \$ ~~50,000~~ \$53,000

per Denise Buttitt. by phone 10/21/24

Project Funding from Other Sources: \$ 142,500

9. Source of Applicant's Other Funds: Anticipated Funding and Event Sales

10. What is the anticipated total attendance for your event? 14,000

Total "tourist" anticipated? 40-50%

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

12. Provide the information below as an attachment to your application:

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.

Event or Project Director: Thomas Roy Hicks, II

Date: 9/10/2024

2024-25 ATAX REVENUE & EXPENSE BUDGET

- PROJECTED

<u>Event/Project Projected Revenues</u>	
Admission Receipts	\$ 75,000
Private Donations	\$ 25,500
City of Beaufort ATAX Request	\$ 50,000
Beaufort County TAX Request	\$ 41,000
Hilton Head ATAX Request	
Town of Bluffton ATAX Request	
Other Area ATAC Request(s) HTAX	\$ 4,000
Total Revenues	\$195,500
<u>Event/Project Projected Expenses</u>	
Sales Promotional Expenses	\$ 5,500
Publicity Materials Expense	\$ 15,000
Newspaper Advertising	
Radio Expense	\$ 6,000
Magazine Expense	\$ 2,500
Television Expense	\$ 20,000
Billboard Advertising	\$ 20,000
Printing	
Direct Mail Expenses	
Brochure Printing	
Flyer Printing	
Other Promotional Items	\$ 7,500
Postage Supplies	
Equipment Rental	\$ 1,500
Speaker Fees	\$ 1,000
Entertainment Fees	\$ 56,000
Hospitality Fees	\$ 500
Decorations	\$ 1,500
Refreshments	\$ 500
Other Expenses (Detail Below)	\$ 58,000
Total Projected Revenues-Expenses	\$ 195,500
Event/Project Projected Profit or Loss	\$ 0

Other Expenses

Electrical	\$ 17,500
Police	12,000
Sanitation	6,500
Venue	7,500
Shuttle Service	8,000
Supplies	6,500
Total Other Expenses	\$ 58,000

Return to: **CITY OF BEAUFORT**
Attn: Finance Department
1911 Boundary Street
Beaufort, SC 29902

Any questions, please contact Jay Phillips at 843-525-7071 or jphillips@cityofbeaufort.org.

Only submit pages 6-9 including the event budget as part of this packet. Pages 1-5 are for the applicant's records.

I Thomas Roy Hicks, II have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2024-2025 Accommodations Tax Funds.

<u>Thomas Roy Hicks, II</u>	<u>Thomas Roy Hicks, II</u>	<u>9/10/2024</u>
Printed Name	Signature	Date

**ACCOMMODATIONS TAX
APPLICATION FISCAL YEAR 2025**



**CITY OF BEAUFORT
TOURISM DEVELOPMENT ADVISORY COMMITTEE**

Submitted by:

The Original Gullah Festival of South Carolina, Inc.

EIN: 57-0817939

P.O. Box 83, Beaufort, SC 29902

Thomas Roy Hicks, II, President & Chief Executive Officer

trhicksii@gmail.com • 678-865-9065

Denise Mason Bullitt, Grant Strategist

sankofainspirit@gmail.com • 843-593-0904

12.B. Defined Budget

The Original Gullah Festival of SC, Inc. is seeking \$53,000 to support this historic and culturally significant event, which drew over 13,000 visitors during its three-day gathering in May 2024. As one of Beaufort's premier festivals, it is renowned worldwide among scholars, students, and enthusiasts of Gullah Geechee heritage.

Our funding request aims to elevate the tourist experience by:

- a. **Celebrating and educating visitors** about the significance of Gullah culture, history, and heritage through a diverse array of arts, workshops, storytelling, food, and lectures. These elements are helping to establish the festival as a must-attend event for families, educators, African Americans, art and history lovers, and young adults.
- b. **Strengthening tourist participation** from key markets such as Augusta and Atlanta, GA, Columbia, SC, and beyond. We plan to launch a digital and social media campaign from January to April 2025, delivering targeted advertising impressions to both regional and direct flight/drive-in markets, allowing ample time for trip planning. Additionally, we will collaborate with our DMO to execute television, radio, and print media campaigns.
- c. **Developing a digital event chaperone** to enhance the festival experience by providing an event map, program descriptions, and a comprehensive schedule. This tool will also collect participant data, which will be invaluable for improving future festival experiences.
- d. **Providing Shuttle Service** to improve attendee experience particularly when navigating between festival sights and when enjoying an air-conditioned tour to learn about our city's significant contributions to our country and the many contributions of the Gullah people.

Specifically, included in the City of Beaufort ATAX request is the following.

Digital & Social Media	\$ 15,000
Magazine Advertising	2,500
Television Advertising	20,000
Shuttle Service	8,000
Digital Chaperone	7,500
Total Amount Included in this request	\$53,000

12.C. A Brief Summary of Event

The Original Gullah Festival of SC, Inc. is a non-profit, tax-exempt organization based in Beaufort, SC. Established by native Beaufortonians in 1986 and incorporated in 1987, this three-day celebration aims to preserve and share the beauty and history of Gullah culture—a unique blend of West African heritage and Lowcountry traditions—while promoting arts education. The festival is family-friendly, non-alcoholic, pet-free, and open to all, attracting visitors from around the globe.

As we approach the festival's 40th anniversary, we are revitalizing this signature event by expanding our marketing reach and welcoming a new generation of attendees. We are positioning the Gullah Festival as a "must-visit" destination for those celebrating Memorial Day, Juneteenth, and honoring the service of veterans and retired military personnel. We are working on creating more "Instagram-able" moments that will support more involvement from young adults and teens.

To enhance participation, we are upgrading our Sunday entertainment to attract as many visitors as we do on Saturday, encouraging extended engagement in festival activities. One common challenge we've faced is the event's widespread layout, which can be confusing for attendees. To address this, we are introducing a "digital chaperone," providing a comprehensive schedule, an interactive map with markers for walkable locations, detailed program descriptions, and information about art and food vendors. We believe this will greatly improve the visitor experience and foster greater engagement with the festival.

By enhancing Sunday's line-up and offering the digital chaperone, we hope to encourage more visitors to stay overnight for Beaufort's Memorial Day Parade—many of whom learn about this historic celebration through the Gullah Kinfolk's Decoration Day musical performance, a key feature of the festival. Additionally, the digital chaperone will provide local businesses with advertising opportunities, further supporting Beaufort's tourism economy.

12.D. Describe how the event relates to the organization's purposes and identify who is expected to benefit.

We "ed-u-tain" (educate/entertain) new and frequent visitors who want to enhance their knowledge of the Gullah Geechee Corridor, its history, and heritage. Our event offers such learning through arts, crafts, food, music, song, dance and spoken word. We provide the platform for local and regional talents to express their artistic gifts on stage, in workshops, and conference settings. Teaching of the Gullah dialect to the young and seasoned is also provided. Learning and celebrating the Gullah Geechee history and culture firsthand continues to be the primary reason why people attend the event.

12.E. Tourism

The Gullah Festival is one of Beaufort's signature cultural events and serves as a key introduction to the Lowcountry for many tourists. Often, it is the first festival visitors discover when researching the region, and their experience at the festival sparks an ongoing connection with Beaufort, inspiring them to return for other events throughout the year.

According to Robb Wells of the Beaufort, Port Royal, and Sea Islands Visitor's Bureau, the 2024 festival saw record attendance, with over 13,000 visitors—an historical high. While many tourists visit Beaufort during Memorial Day weekend to enjoy the beach, a significant number also attend the Gullah Festival, which offers them the chance to experience the rich cultural and historical heritage of the area.

Mr. Wells also noted that festival attendance tends to spike when main-stage entertainment is prominently scheduled and advertised, which accounts for the lower turnout on Sunday afternoons. For the 2025 festival, we plan to increase our entertainment budget to ensure a more robust Sunday lineup

that draws as many attendees as Saturday. Currently, 40-45% of festival attendees are tourists, according to data from our DMO, underscoring the festival's significant impact on tourism in the region.

12.F. Evaluation

Evaluation Marker	Evaluation Measure
Event Participation	DMO tourist tracking
Attendee Satisfaction	Digital Chaperone experience survey
Attraction Satisfaction	Ticket Sales & experience survey

###

I, Thomas R. Hicks, II, have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2023-2024 Accommodations Tax Funds.

Thomas R. Hicks, II

Thomas R. Hicks II

9/10/2024

Printed Name

Signature

Date

THE ORIGINAL GULLAH FESTIVAL OF SOUTH CAROLINA, INC.
2024 Itemized Expenses for City of Beaufort

					Beaufort - City ATAX \$33,825
Name of Business	Invoice Amount	Description			
Kidz Play	\$1,430.74	Axe Throwing Gym			\$1,430.74
AlphaGraphics	\$745.00	Banners			\$745.00
B&B Electrical	\$5,000.00	Electrician			\$5,000.00
Deglar Waste Service	\$3,901.55	Port-a-Johns			\$3,901.55
Sunbelt Rental	\$968.91	Tower Lights			\$968.91
Workforce Interface	\$1,370.00	Stat Collection			\$1,370.00
Lamb Professional Solutions, Inc.	\$2,500.00	Advertising Promotion Billboard Services			\$2,500.00
Greg Norton's Lights and Sound	\$8,000.00	Lights and Sound			\$8,000.00
Guy's Helping Hands	\$2,500.00	Sanitation Service			\$2,500.00
Enterprise Van Rental	\$6,509.24	Tours and Shuttling			\$6,509.24
Westbrook Commercial Services	\$5,000.00	Marketing and promotional services - booking of all ad buys, set up of billboards, and media buys			\$5,000.00
Park Beaufort	\$3,336.00	Waterfront Parking Lot			\$3,336.00
City of Beaufort Rental	\$1,500.00	Park Rental Police Fire			\$1,500.00
WSAV	\$5,000.00	TV Commercial			\$5,000.00
WTOC	\$5,680.00	TV Commercial			\$5,680.00
Bluffton Sun	\$789.00	Newspaper ads			\$789.00
WKWQ 100.7	\$300.00	Local Radio Advertisement			\$300.00
94.5 Praise Radio Station	\$500.00	Radio Commercial in Beaufort			\$500.00
Mikiba Publishing	\$1,400.00	Excursion Planning			\$1,400.00
Reddy Ice	\$1,625.62	Ice			\$1,625.62
City of Beaufort	\$12,541.72	Police, Fire, EMS			\$12,541.72
Totals	\$70,597.78				\$70,597.78

The Original Gullah Festival of SC, Inc

Statement of Activity

January 1 - September 11, 2024

	TOTAL
Revenue	
Contributed income	
Government grants & contracts	
Arts Commission Grant	12,750.00
Beaufort County A-Tax	17,500.00
City of Beaufort A-Tax	32,826.40
City of Beaufort H-Tax	2,000.00
Total Government grants & contracts	65,076.40
Total Contributed income	65,076.40
Sales	8,499.09
Festival Sales	4,776.00
Festival-Square Sales	34,805.37
Festivals - Paypal	16,116.32
Total Sales	64,196.78
Total Revenue	\$129,273.18
GROSS PROFIT	\$129,273.18
Expenditures	
Advertising & marketing	11,234.68
Contract & professional fees	4,766.00
Insurance	2,247.07
Office expenses	
Bank fees & service charges	7,150.00
Fees & Charges	81.36
Total Bank fees & service charges	7,231.36
Memberships & subscriptions	275.00
DDues & Subscriptions	683.73
Total Memberships & subscriptions	958.73
Shipping & postage	235.00
Software & apps	1,060.84
Total Office expenses	9,485.93
Payroll expenses	
Salaries & wages	63.81
Total Payroll expenses	63.81
Performers	58,112.32
Radio, TV, Magazine, etc.	10,815.00
Supplies	14,745.42
Supplies & materials	240.00
Festival Supplies	8,280.29
Total Supplies & materials	8,520.29
Total Supplies	23,265.71

The Original Gullah Festival of SC, Inc

Statement of Activity

January 1 - September 11, 2024

	TOTAL
Telephone & Internet	1,549.14
Travel	9,136.45
Hotels	1,480.26
Vehicle rental	2,892.87
Total Travel	13,509.58
Total Expenditures	\$135,049.24
NET OPERATING REVENUE	\$ -5,776.06
Other Expenditures	
Meals	200.35
Meals Breakfast	953.51
Meals Dinner	956.82
Meals Lunch	453.10
Vehicle expenses	8,539.68
Parking & tolls	276.01
Vehicle gas & fuel	999.21
Total Vehicle expenses	9,814.90
Total Other Expenditures	\$12,378.68
NET OTHER REVENUE	\$ -12,378.68
NET REVENUE	\$ -18,154.74



CITY OF BEAUFORT
DEPARTMENT REQUEST FOR CITY COUNCIL AGENDA ITEM

TO: CITY COUNCIL **DATE:** 11/13/2024
FROM: Alan Eisenman, Finance Director
AGENDA ITEM TITLE: City Owned Properties- Return on Investment Analysis
MEETING DATE: 11/19/2024
DEPARTMENT: Finance

BACKGROUND INFORMATION:

During City Council's Strategic Planning Retreat in February 2024, there was discussion regarding City owned properties and their financial impact. This presentation focuses on the return on investment analysis. Please see attached document for further breakdown of ROI calculations along with a list of City owned properties that were not included in presentation due to smaller value or size of property.

PLACED ON AGENDA FOR: *Discussion*

REMARKS:

ATTACHMENTS:

Description	Type	Upload Date
City Owned Properties Presentation	Presentation	11/14/2024
City Owned Properties ROI Breakdown	Backup Material	11/14/2024
City Owned Properties Not Included in Presentation	Backup Material	11/14/2024
Regional Economic Analysis Laboratory- Beaufort Commerce Park Analysis	Backup Material	11/13/2024

City of Beaufort Real Properties Return on Investment Analysis



November 19, 2024

City Owned Properties Background



- During City Council's Strategic Planning Retreat in February 2024, there was discussion regarding City owned properties and their financial impact.
- This presentation focuses on the return on investment analysis broken down by the following categories of real property:
 1. Staff Occupied/Operational Use
 2. Passive Parks
 3. Improved Properties
 4. Unimproved Properties
 5. Beaufort Commerce Park
 6. Cell Phone Tower



Real Property Format

- Property Category

Name of Real Property / PIN:

- Primary Use of Facility
- Date of Acquisition
- Initial Cost- Some properties were unable to determine initial cost due to age/history.
- Current Value- Determined using 2023 Assessed Values from Property Tax Bills, but did not order current property appraisals.
- Revenues through June 30, 2024
- Expenses through June 30, 2024
- Return on Investment (ROI)



Return on Investment (ROI) Calculation

- The return on investment calculation formula used for this presentation is the following:

$$\frac{\text{Current Value} - (\text{Cost of Investment} + * \text{Net Operating Expenses})}{\text{Cost of Investment}}$$

- Net Operating Expenses is the sum of all debits and credits associated with the property, e.g., utilities, insurance, maintenance, repairs, rental revenue, parking revenue, etc.
- The City included the past 5 years of operating revenues and expenses along with any capital expenditures and associated revenues for the past 10 years.
- A positive ROI number reflects total returns exceed total costs.
- A negative ROI number reflects total costs exceed total returns.

1. Staff Occupied/Operational Use 500 Carteret Street



- R120 004 000 1028 0000- Building
- R120 004 000 726A 0000- Parking Lot
- Office Space for Beaufort Digital Corridor, Park Beaufort, Downtown Operations and other tenants.
- Date of Acquisition- January 2018
- Initial Costs- \$1,284,000 from lease purchase agreement with quarterly payments from January 2016 to January 2018



1. Staff Occupied/Operational Use 500 Carteret Street



- Current Value- \$3,200,400 Assessed Value for Building and \$985,700 for Parking Lot from 2023 Property Tax Bill. Total Assessed Value is \$4,186,100.
- Revenues through June 30, 2024- \$489,483
- Expenses through June 30, 2024- \$614,597
- Return on Investment= 216%

1. Staff Occupied/Operational Use 1901 and 1911 Boundary Street



- City Hall and Police Department and Municipal Court Complex
- R120 003 000 0003 0000
- City Hall is home to City Manager, Human Resources, Finance and Community Development Departments. Police and Court Departments occupies the Municipal Complex.
- Date of Acquisition- 2010
- Initial Costs- \$15,000,000 from issuance of 2008 General Obligation Bonds.



1. Staff Occupied/Operational Use 1901 and 1911 Boundary Street



- Current Value- \$23,809,400 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$8,377,805 which includes \$7,383,078 from associated GO Bond Interest
- Return on Investment= 2.9%

1. Staff Occupied/Operational Use 135 Ribaut Road



- Fire Station #1- Headquarters
- R120 003 000 0078 0000
- Fire Station and Fire Administration Offices
- Date of Acquisition- 2/1/83 for land and 1/1/90 for building
- Initial Costs- \$67,000 for land and \$640,810 for building for total of \$707,810



1. Staff Occupied/Operational Use 135 Ribaut Road



- Current Value- \$1,143,100 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$164,059
- Return on Investment= 38.3%

1. Staff Occupied/Operational Use 1120 Ribaut Road



- Fire Station #2
- R120 007 000 087N 0000
- Fire Station
- Date of Acquisition- 6/13/14 for land and 1/8/16 for building
- Initial Costs- \$33,000 for land and \$3,494,029 for building for total of \$3,527,029



1. Staff Occupied/Operational Use 1120 Ribaut Road



- Current Value- \$4,220,100 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$84,740
- Return on Investment= 17.2%

1. Staff Occupied/Operational Use 571 Robert Smalls Parkway



- Fire Station #4
- R112 028 000 0989 0000
- Fire Station
- Date of Acquisition- 12/29/2021
- Initial Costs- \$3,000,000 from issuance of 2021 General Obligation Bonds.



1. Staff Occupied/Operational Use 571 Robert Smalls Parkway



- Current Value- \$3,000,000 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$412,830 which includes \$94,124 from associated GO Bond Interest
- Return on Investment= -13.8%

1. Staff Occupied/Operational Use 16 Burton Hill Road



- Public Works Facility
- R122 029 000 0132 0000
- Date of Acquisition- 8/1/1985
- Initial Costs- \$375,000 for land and \$376,066 for building for total of \$751,066.



1. Staff Occupied/Operational Use 16 Burton Hill Road



- Current Value- \$2,025,000 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$577,453
- Return on Investment= 92.7%

2. Passive Parks Morral Park



- R120 004 000 0881 0000
- Passive Park located on Craven and Carteret Street.
- Date of Acquisition- Unable to Determine
- Initial Costs- Unable to Determine, Will Assume \$1 for ROI calculation



2. Passive Parks Morral Park



- Current Value- \$461,500 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$205
- Return on Investment= 46,129,400%

2. Passive Parks Wilson Park



- R120 005 000 0151 0000
- Passive Park located on Ribaut Road down from Hermitage Road
- Date of Acquisition- Unable to Determine
- Initial Costs- Unable to Determine, Will Assume \$1 for ROI calculation



2. Passive Parks Wilson Park



- Current Value- \$1,019,600 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$205
- Return on Investment= 101,939,400%

2. Passive Parks Knott Park



- R120 004 000 0744 0000
- Passive Park located on King and East Street in the Point.
- Date of Acquisition- Unable to Determine
- Initial Costs- Unable to Determine, Will Assume \$1 for ROI calculation



2. Passive Parks Knott Park



- Current Value- \$566,300 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$710
- Return on Investment= 56,558,900%

2. Passive Parks

Henry C. Chambers Waterfront Park



- R120 004 000 0971 0000
- R120 004 000 0935 0000
- R120 004 000 0936 0000
- Waterfront Park
- Date of Acquisition- 1979
- Initial Costs- Unable to Determine, Will Assume \$1,000,000 for ROI calculation



2. Passive Parks Henry C. Chambers Waterfront Park



- Current Value- \$6,558,000 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$4,075,149
- Expenses through June 30, 2024- \$9,226,480
- Return on Investment= 41%

2. Passive Parks Beaufort Marina



- R120 004 000 0972 0000- Marina
- R120 004 000 0973 0000- Marina Parking Lot
- Marina
- Date of Acquisition- 1991
- Initial Costs- \$111,496



2. Passive Parks Beaufort Marina



- Current Value- \$5,041,500 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$1,047,704
- Expenses through June 30, 2024- \$993,116
- Return on Investment= 4,470%

2. Passive Parks Southside Park



- R120 008 000 0015 0000
- Southside Park
- Date of Acquisition- 1999
- Initial Costs- Unable to Determine, Will Assume \$1,000,000 for ROI calculation



2. Passive Parks Southside Park



- Current Value- \$6,117,600 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$2,738,304
- Expenses through June 30, 2024- \$2,959,923
- Return on Investment= 489%

2. Passive Parks Washington Street Park



- 1011 Washington Street
- R120 004 000 0287 0000
- Washington Street Park
- Date of Acquisition- Lease from Beaufort County Community Center
- Initial Costs- Unable to Determine, Will Assume \$100,000 for ROI calculation



2. Passive Parks Washington Street Park



- Current Value- \$539,600 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$167,822
- Expenses through June 30, 2024- \$220,609
- Return on Investment= 386%

2. Passive Parks Pigeon Point Park



- 1512 Pigeon Point Road
- R120 002 000 0331 0000
- Pigeon Point Park
- Date of Acquisition- Unable to Determine
- Initial Costs- Unable to Determine, Will Assume \$1,000,000 for ROI calculation



2. Passive Parks Pigeon Point Park



- Current Value- \$2,508,800 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$313,746
- Return on Investment= 119%

3. Improved Properties 1100 Boundary Street- USCB and South Coast Cyber Center



- R120 004 000 0068 0000
- USCB Cybersecurity Program and South Coast Cyber Center
- Date of Acquisition- 12/29/21
- Initial Cost- \$2,300,000 through issuance of 2021 General Obligation Bond



3. Improved Properties

1100 Boundary Street- USCB and South Coast Cyber Center



- Current Value- \$4,523,500 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$679,898
- Expenses through June 30, 2024- \$811,333
- Return on Investment= 90.9%

3. Improved Properties

701 Craven Street

Carnegie Library Building



- R120 004 000 0819 0000
- Local historical site and office space for Greater Beaufort-Port Royal Convention and Visitors Bureau
- Date of Acquisition- Built in 1918 and renovated for City Hall offices in 1964
- Initial Cost- \$750 local match with \$7,500 grant from the Carnegie Corporation in 1917. The value of \$750 from 1917 is \$23,862 in 2024.

3. Improved Properties

701 Craven Street

Carnegie Library Building



- Current Value- \$266,300 Assessed Value from 2023 Property Tax Bill, but \$710,700 value for property insurance.
- Revenues through June 30, 2024- \$251,446
- Expenses through June 30, 2024- \$237,117
- Return on Investment= 2,938%

3. Improved Properties

713 Craven Street

Arsenal Building



- R120 004 000 819A 0000
- Local historical site and home to Beaufort History Museum and Visitor Center
- Date of Acquisition- Built in 1798 and renovated in 1930.
- Initial Cost- Sold for \$1 in May 1987 according to Beaufort County Tax Records.

3. Improved Properties

713 Craven Street

Arsenal Building



- Current Value- \$933,300 Assessed Value from 2023 Property Tax Bill, but \$1,731,900 value for property insurance.
- Revenues through June 30, 2024- \$122,687
- Expenses through June 30, 2024- \$808,858
- Return on Investment= 104,572,800%

4. Unimproved Properties 2635 Boundary Street



- R100 029 000 002C 0000
- City Civic Master Plan proposes the creation of the Beaufort River Regional Greenway with Boundary Street Greenway Entrance
- Date of Acquisition- 9/29/23
- Initial Cost- \$231,267

4. Unimproved Properties 2635 Boundary Street



- Current Value- \$250,000 Assessed Value from 2024 Notice of Assessment of Real Estate from Beaufort County.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$629
- Return on Investment= 7.8%

4. Unimproved Properties 2153 Boundary Street



- R122 001 000 271A 0000
- Potential Connection for Parallel Road Project
- Date of Acquisition- 5/1/20
- Initial Cost- \$200,000

4. Unimproved Properties 2153 Boundary Street



- Current Value- \$372,600 Assessed Value from 2023 Property Tax Bill.
- Revenues through June 30, 2024- \$0
- Expenses through June 30, 2024- \$1,770
- Return on Investment= 85.4%

4. Unimproved Properties

List of Properties Not in Presentation



- There is a list of city-owned properties that were not included in presentation due to presentation constraints and relatively smaller and less valuable parcels.
- List is included in agenda packet to show the entire population of city-owned properties.

5. Commerce Park Beaufort Commerce Park



- R120 024 000 0407 0000- 73 Schein Loop
- R120 024 000 0408 0000- 57 Schwartz Road
- R120 024 000 0409 0000- Beaufort Industrial Park
- R120 020 000 0267 0000- Beaufort Industrial Park
- R120 020 000 0268 0000- Beaufort Industrial Park
- R120 020 000 0270 0000- 38 Schwartz Road
- R120 020 000 0269 0000- 90 Schork Road
- R120 024 000 0447 0000- 57 Schwartz Road
- R120 024 000 0453 0000- Tract A
- R120 024 000 0449 0000- Schork Road



5. Commerce Park

Beaufort Commerce Park



- Date of Acquisition- Initial 209 acres purchased May 2012 and an additional 28 acres (14 purchased and 14 donated) September 2019
- Initial Cost- \$1,850,000 through issuance of 2012 General Obligation Bond and \$417,300 in September 2019 for total initial cost of \$2,267,300
- Current Value- \$6,120,700 Assessed Value from 2023 Property Tax Bills
- Revenues through June 30, 2024- \$1,154,985
- Expenses through June 30, 2024- \$745,300 including \$225,564 in Bond Interest
- Return on Investment= 188%
- Beaufort Commerce Park Analysis from Regional Economic Analysis Laboratory (REAL) from Clemson University. Report dated 1/2/24

6. Cell Phone Tower 16 Burton Hill Road



- R122 029 000 0132 0000
- Wireless communications cell tower
- Date of Acquisition- Communication tower constructed in 1999.
- Initial Cost- Unknown, will assume \$100,000 for ROI calculation

6. Cell Phone Tower 16 Burton Hill Road



- Current Value- \$300,000 from recent offers from interested parties.
- Revenues through June 30, 2024- \$182,025 over past 5 years.
- Expenses through June 30, 2024- \$47,400 over past 5 years.
- Return on Investment= 334%
- Long-term lease agreements in place with cell phone carriers.

Questions/Comments



City of Beaufort Properties- ROI Analysis

Categories of Real Property

1. Staff Occupied / Operational Use
2. Passive Parks
3. Improved Properties
4. Unimproved Properties
5. Commerce Park
6. Cell Phone Tower

Property Category

Name of Real Property / PIN:

- Primary Use of Facility
- Date of Acquisition
- Initial Cost
- Current Value
- Revenues through June 30, 2024
- Expenses through June 30, 2024
- Return on Investment (ROI) =

Current Value – (Cost of Investment + *Net Operating Expenses)

Cost of Investment

**** Net Operating Expenses is the sum of all debits and credits associated with the property, e.g., utilities, insurance, maintenance, repairs, rental revenue, parking revenue, etc.***

1. Staff Occupied/Operational Use

500 Carteret Street

R120 004 000 1028 0000- Building

R120 004 000 726A 0000- Parking Lot

AIN: 242004565- Building

AIN: 00222495- Parking Lot

- **Primary Use of Facility-** Office Space for Beaufort Digital Corridor, Park Beaufort, Downtown Operations and other tenants.
- **Date of Acquisition-** January 2018
- **Initial Cost-** \$1,284,000 from lease purchase agreement with quarterly payments from January 2016 to January 2018.
- **Current Value-** \$3,200,400 Assessed Value for Building and \$985,700 for Parking Lot from 2023 Property Tax Bill. Total Assessed Value is \$4,186,100.
- **Revenues through June 30, 2024-** \$271,035 Capital Grants for Landing Pad Project, Beaufort Property Management Rent \$16,380 (Last 5 Years), \$103,812 Beaufort Digital Corridor Rent (Last 5 Years), SP+ Rent \$60,516 (Last 5 Years), Sea Island Insurance Rent \$18,144 (Last 2 Years), New Story Lending \$19,596 (Last Year)
- Total Revenues= \$489,483
- **Expenses through June 30, 2024-** \$68,401 Electricity (Last 5 Years), \$13,151 Water (Last 5 Years), \$468,890- Landing Pad Project, \$5,410 Property Taxes (Last 5 Years), \$30,045 Property Insurance (Last 5 Years), \$28,700 Janitorial Services (Last 5 Years)
- Total Expenses= \$614,597
- **Return on Investment (ROI) =** $(\$4,186,100 - (\$1,284,000 + \$125,114)) / \$1,284,000 = \$2,776,986 / \$1,284,000 = 216\%$

1. Staff Occupied/Operational Use

1901 and 1911 Boundary Street- City Hall and Police Department and Court Municipal Complex

R120 003 000 0003 0000

AIN: 00205085

- **Primary Use of Facility-** City Hall is home to City Manager, Human Resources, Finance and Community Development Departments. Police and Court Departments occupies the Municipal Complex.
- **Date of Acquisition-** 2010
- **Initial Cost-** \$15,000,000 from issuance of 2008 general obligation bonds.
- **Current Value-** \$23,809,400 Assessed Value from 2023 Property Tax Bill for City Hall and Municipal Complex.
- **Revenues through June 30, 2024-** None
- Total Revenues= \$0
- **Expenses through June 30, 2024-**, Bond Interest (2008 GO Bond Interest from 2/1/2009 to 2/1/2018, 3.5% to 5%) \$5,087,937 (City Hall and PD), Bond Interest (2016 Refunding GO Bond Interest from 2/1/2018 to 6/30/2024, 2% to 5%) \$2,295,141, \$9,553 Property Taxes (City Hall and PD) (Last 5 Years), \$35,390 Property Insurance- City Hall (Last 5 Years), \$27,125 Property Insurance- PD (Last 5 Years), \$217,409 Contractual Services City Hall (Last 5 Years), \$108,840 Contractual Services PD (Last 5 Years), \$11,816 Alarm System City Hall (Last 5 Years), \$81,796 Alarm System PD (Last 5 Years), \$17,251 Maintenance- Elevator City Hall (Last 5 Years), \$35,804 Maintenance- Elevator PD (Last 5 Years), \$39,823 Maintenance-HVAC City Hall (Last 5 Years), \$58,544 Maintenance-HVAC PD (Last 5 Years), \$6,714 Maintenance Materials City Hall (Last 5 Years), \$8,628 Maintenance Materials PD (Last 5 Years), \$9,590 Pest Control City Hall (Last 5 Years), \$9,290 Pest Control PD (Last 5 Years), \$18,732 Safety Equipment City Hall (Last 5 Years), \$21,602 Safety Equipment PD (Last 5 Years), \$31,588 Electricity City Hall (Last 5 Years), \$196,084 Electricity PD (Last 5 Years), \$5,225 Water City Hall (Last 5 Years), \$32,562 Water PD (Last 5 Years), \$11,361 Supplies-Janitorial PD
- Total Expenses= \$8,377,805 that includes \$7,383,078 from associated GO Bond interest

- **Return on Investment (ROI)** = $(\$23,809,400 - (\$15,000,000 + \$8,377,805)) / \$15,000,000 = \$431,595 / \$15,000,000 = 2.9\%$

1. Staff Occupied/Operational Use

Fire Station #1- 135 Ribaut Road

R120 003 000 0078 0000

- **Primary Use of Facility-** Fire Station
- **Date of Acquisition-** 2/1/1983 for land and 1/1/1990 for building
- **Initial Cost-** \$67,000 for land and \$640,810 for building for total of \$707,810
- **Current Value-** \$1,143,100 from 2023 Property Tax Bill
- **Revenues through June 30, 2024-** None
- Total Revenues= \$0
- **Expenses through June 30, 2024-** \$11,870 Property Insurance, \$59,494 Bunkroom Remodel, Fire Station Upgrades \$42,010, \$10,320 Electrical, \$26,520 Water, \$10,140 Telephone, \$3,705 Property Taxes
- Total Expenses= \$164,059
- **Return on Investment (ROI)** = $(\$1,143,100 - (\$707,810 + \$164,059)) / \$707,810 = \$271,231 / \$707,810 = 38.3\%$

1. Staff Occupied/Operational Use

Fire Station #2- 1120 Ribaut Road

R120 007 000 087N 0000

- **Primary Use of Facility-** Fire Station
- **Date of Acquisition-** 6/13/14 for land and 1/8/16 for building
- **Initial Cost-** \$33,000 for land and \$3,494,029 for building for total of \$3,527,029
- **Current Value-** \$4,220,100 from 2023 Property Tax Bill
- **Revenues through June 30, 2024-** None
- Total Revenues= \$0
- **Expenses through June 30, 2024-** \$14,325 Property Insurance, \$26,400 Electrical, \$30,660 Water, \$10,140 Telephone, \$3,215 Property Taxes

- Total Expenses= \$84,740
- **Return on Investment (ROI) =** $(\$4,220,100 - (\$3,527,029 + \$84,740)) / \$3,527,029 =$
 $\$608,331 / \$3,527,029 = 17.2\%$

1. Staff Occupied/Operational Use

Fire Station #4- 571 Robert Smalls Parkway

R112 028 000 0989 0000

- **Primary Use of Facility-** Fire Station
- **Date of Acquisition-** 12/29/2021
- **Initial Cost-** \$3,000,000 through issuance 2021 General Obligation Bond
- **Current Value-** \$3,000,000 from 2023 Property Tax Bill
- **Revenues through June 30, 2024-** None
- Total Revenues= \$0
- **Expenses through June 30, 2024-** \$8,420 Property Insurance, \$44,040 Electrical, \$8,520 Water, \$10,140 Telephone, \$182,706 Lease Payments Prior to Purchasing Building, \$64,880 Property Taxes, Portion Related to Bond Interest ($\$168,640^* (3,000,000/5,375,000)$) \$94,124
- Total Expenses= \$412,830
- **Return on Investment (ROI) =** $(\$3,000,000 - (\$3,000,000 + \$412,830)) / \$3,000,000 =$
 $\$-412,830 / \$3,000,000 = -13.8\%$

1. Staff Occupied/Operational Use

16 Burton Hill Road

R122 029 000 0132 0000

AIN: 00168482

Primary Use of Facility- Public Works Facility

- **Date of Acquisition-** 8/1/1985
- **Initial Cost-** \$375,000 for land and \$376,066 for building for total of \$751,066
- **Current Value-** \$2,025,000 from 2023 Beaufort County Property Tax Bill
- **Revenues through June 30, 2024-** None

- Total Revenues= \$0
- **Expenses through June 30, 2024-** \$20,615 Property Taxes (Last 5 Years), \$11,265 Property Insurance (Last 5 Years), Public Works Renovations \$51,662, Public Works Storage Facility \$46,157, PW Metal Building \$90,000, Public Works Equipment Shed- \$299,984, Public Works Roofing, \$39,050, Electricity- \$13,200, Water- \$5,520
- Total Expenses= \$577,453 Total last 5 Years
- **Return on Investment (ROI) =** $(\$2,025,000 - (\$751,066 + \$577,453)) / \$751,066 = \$696,481 / \$751,066 = 92.7\%$

2. Passive Parks

Morrall Park

R120 004 000 0881 0000

- **Primary Use of Land-** Passive Park
- **Date of Acquisition-** Unable to Determine
- **Initial Cost-** Unable to Determine, Will Assume \$1 for ROI calculation
- **Current Value-** \$461,500 from 2023 Property Tax Bill
- **Revenues through June 30, 2024-** None
- Total Revenues= \$0
- **Expenses through June 30, 2024-** \$205 Property Taxes (Last 5 Years)
- Total Expenses= \$205
- **Return on Investment (ROI) =** $(\$461,500 - (\$1 + \$205)) / \$1 = \$461,294 / \$1 = 46,129,400\%$

2. Passive Parks

Wilson Park

R120 005 000 0151 0000

- **Primary Use of Land-** Passive Park
- **Date of Acquisition-** Unable to Determine
- **Initial Cost-** Unable to Determine, Will Assume \$1 for ROI calculation
- **Current Value-** \$1,019,600 from 2023 Property Tax Bill

- **Revenues through June 30, 2024**- None
- Total Revenues= \$0
- **Expenses through June 30, 2024**- \$205 Property Taxes (Last 5 Years)
- Total Expenses= \$205
- **Return on Investment (ROI)** = $(\$1,019,600 - (\$1 + \$205)) / \$1 = \$1,019,394 / \$1 = 101,939,400\%$

2. Passive Parks

Knott Park

R120 004 000 0744 0000

- **Primary Use of Land**- Passive Park
- **Date of Acquisition**- Unable to Determine
- **Initial Cost**- Unable to Determine, Will Assume \$1 for ROI calculation
- **Current Value**- \$566,300 from 2023 Property Tax Bill
- **Revenues through June 30, 2024**- None
- Total Revenues= \$0
- **Expenses through June 30, 2024**- \$710 Property Taxes (Last 5 Years)
- Total Expenses= \$710
- **Return on Investment (ROI)** = $(\$566,300 - (\$1 + \$710)) / \$1 = \$565,589 / \$1 = 56,558,900\%$

2. Passive Parks

Henry C. Chambers Waterfront Park

R120 004 000 0971 0000

R120 004 000 0935 0000

R120 004 000 0936 0000

- **Primary Use of Land**- Waterfront Park
- **Date of Acquisition**- 1979
- **Initial Cost**- Unable to Determine, Will Assume \$1,000,000 for ROI calculation

- **Current Value-** \$6,558,000 from 2023 Property Tax Bill
- **Revenues through June 30, 2024-** \$58,235 Waterfront Park Rentals (Last 5 Years), Waterfront Park Reliving Platform Project Grants- \$516,914, \$3,500,000 Waterfront Park 2011 Series Revenue Bond
- Total Revenues= \$4,075,149
- **Expenses through June 30, 2024-** \$11,015 Property Taxes (Last 5 Years), \$1,914,908 Contractual Services (Last 5 Years), \$128,044 Information Technology (Last 5 Years), \$61,263 Maintenance Facilities (Last 5 Years), \$105,518 Maintenance Grounds (Last 5 Years), \$58,073 Internet (Last 5 Years), \$16,450 Property Insurance (Last 5 Years), \$3,500,000 Waterfront Park Improvements from 2011 Series Hospitality Revenue Bond, \$1,070,409 Associated Interest from 2011 Series Hospitality Revenue Bond, Waterfront Park Reliving Platform Project- \$1,360,800
- Total Expenses= \$9,226,480
- **Return on Investment (ROI) =** $(\$6,558,000 - (\$1,000,000 + \$5,151,331)) / \$1,000,000 = \$406,669 / \$1,000,000 = 41\%$

2. Passive Parks

Beaufort Marina

R120 004 000 0972 0000- Marina

R120 004 000 0973 0000- Marina Parking Lot

- **Primary Use of Land-** Marina
- **Date of Acquisition-** 1991
- **Initial Cost-** \$111,496
- **Current Value-** \$2,089,600 for Marina and \$2,951,900 for Marina Parking Lot from 2023 Property Tax Bill for total of \$5,041,500
- **Revenues through June 30, 2024-** \$701,704 Marina Lease (Last 5 Years), \$246,000 from 2016 Bond Proceeds for H-Dock Repair Project, \$100,000 Boating Infrastructure Grant
- Total Revenues= \$1,047,704
- **Expenses through June 30, 2024-** \$11,905 Property Taxes (Last 5 Years), \$73,256 Maintenance Facilities (Last 5 Years), \$58,073 Internet (Last 5 Years), \$64,830 Property Insurance (Last 5 Years), \$258,000 Marina H-Dock Project, \$417,583

Transient Dock Project, \$15,595 Marina Pump, \$13,114 Marina Roof Repair, \$21,920 Marina Trash Enclosure, \$58,840 Marina Fire Suppression System

- Total Expenses= \$993,116
- **Return on Investment (ROI) =** $(\$5,041,500 - (\$111,496 - \$54,588)) / \$111,496 = \$4,984,592 / \$111,496 = 4,470\%$

2. Passive Parks

Southside Park

2614 Southside Boulevard

R120 008 000 0015 0000

- **Primary Use of Land-** Southside Park
- **Date of Acquisition-** 1999
- **Initial Cost-** Unable to Determine will use \$1,000,000 for ROI calculation
- **Current Value-** \$6,117,600 from 2023 Property Tax Bill
- **Revenues through June 30, 2024-** \$100,000 Southside Park Grant Project, \$629,304 Property Sales 1505 North Street, \$2,009,000 Parks and Tourism Revenue Bond Proceeds
- Total Revenues= \$2,738,304
- **Expenses through June 30, 2024-** \$18,765 Property Taxes (Last 5 Years), \$141,262 Southside Park Maintenance (Last 5 Years), \$1,950 Property Insurance (Last 5 Years), \$158,965 Southside Park Trail Grant Project, \$2,638,981 Southside Park Phase I Project
- Total Expenses= \$2,959,923
- **Return on Investment (ROI) =** $(\$6,117,600 - (\$1,000,000 + \$221,619)) / \$10 = \$4,895,981 / \$1,000,000 = 489\%$

2. Passive Parks

Washington Street Park

1011 Washington Street

R120 004 000 0287 0000

- **Primary Use of Land-** Washington Street Park

- **Date of Acquisition**- Lease from Beaufort County Community Center
- **Initial Cost**- Unable to Determine will use \$100,000 for ROI calculation
- **Current Value**- \$539,600 from 2023 Property Tax Bill
- **Revenues through June 30, 2024**- \$86,000 Washington Street Restrooms Park Grant Project, \$37,121 Washington Street Park Playground Grant Project, \$44,701 Parks and Tourism Revenue Bond Proceeds
- Total Revenues= \$167,822
- **Expenses through June 30, 2024**- \$710 Property Taxes (Last 5 Years), \$138,077 Washington Street Park Restrooms Grant Project, \$37,121 Washington Street Park Playground Grant Project, \$44,701 Washington Street Park Project
- Total Expenses= \$220,609
- **Return on Investment (ROI)** = $(\$539,600 - (\$100,000 + \$52,787)) / \$100,000 = \$386,813 / \$100,000 = 386\%$

2. Passive Parks

Pigeon Point Park

1512 Pigeon Point Road

R120 002 000 0331 0000

- **Primary Use of Land**- Pigeon Point Park
- **Date of Acquisition**- Unable to determine
- **Initial Cost**- Unable to Determine will use \$1,000,000 for ROI calculation
- **Current Value**- \$2,508,800 from 2023 Property Tax Bill
- **Revenues through June 30, 2024**- None
- Total Revenues= \$0
- **Expenses through June 30, 2024**- \$3,175 Property Taxes (Last 5 Years), \$308,051 Pigeon Point Park Improvements, \$2,520 Property Insurance
- Total Expenses= \$313,746
- **Return on Investment (ROI)** = $(\$2,508,800 - (\$1,000,000 + \$313,746)) / \$1,000,000 = \$1,195,054 / \$1,000,000 = 119\%$

3. Improved Properties

Carnegie Library Building- 701 Craven Street

R120 004 000 0819 0000

- **Primary Use of Facility-** Local historical site and office space for Greater Beaufort-Port Royal Convention and Visitors Bureau
- **Date of Acquisition-** Built in 1918 and renovated for City Hall offices in 1964
- **Initial Cost-** \$750 local match with \$7,500 grant from the Carnegie Corporation in 1917. \$23,862 value in 2024.
- Covenant agreement on Property for 10 Years from Federal Grant through June 2032
- **Current Value-** \$266,300 Assessed Value from 2023 Property Tax Bill, but \$710,700 Value for Insurance
- **Revenues through June 30, 2024-** \$12,500 Building Assessment Grant, \$171,791 Grant Window Restoration Project, \$8,655 FEMA Grant Hurricane Shutters, \$58,500 Rent (April 2021- June 2024 X 39 months X \$1,500/Month with CVB) – Agreement until June 2028
- Total Revenues= \$251,446
- **Expenses through June 30, 2024-** \$9,200 Property Insurance (Last 5 Years), \$6,764 HVAC Maintenance (Last 5 Years), \$3,080 Contractual (Last 5 Years), \$27,546 Building Assessment Report from Grant, \$171,791 Window Restoration Project, \$8,655 Hurricane Window Shutters, \$9,000 Consulting, \$371 RFP Advertising, \$710 Property Taxes (Last 5 Years)
- Total Expenses= \$237,117
- **Return on Investment (ROI) =** $(\$710,700 - (\$23,862 - \$14,329)) / \$23,862 =$
 $\$701,167 / \$23,862 = 2,938\%$

3. Improved Properties

Arsenal Building- 713 Craven Street

R120 004 000 819A 0000

- **Primary Use of Facility-** Local historical site and home to Beaufort History Museum and Visitor Center

- **Date of Acquisition**- Built in 1798 and renovated in 1930
- **Initial Cost**- Sold for \$1 in May 1987 according to Beaufort County Tax Records
- **Current Value**- \$933,300 Assessed Value from 2023 Property Tax Bill, but \$1,731,900 Value for Insurance
- **Revenues through June 30, 2024**- \$100,000 State Grant to Arsenal Windows and Restrooms Renovation Project,(\$278,149 General Fund Transfer for Arsenal Windows and Restrooms Renovation Project Don't Include as Revenue) (\$150,000 State A Tax Transfer for Arsenal Windows and Restroom Renovation Project Don't Include as Revenue) (\$232,000 General Fund Transfer for Arsenal Roof Project Don't Include as Revenue) \$22,681 FEMA Grant Hurricane Shutters, \$6 Rent (July 2018- June 2024 X 6 years X \$1/Year with CVB) – Agreement until June 2028
- Total Revenues= \$122,687
- **Expenses through June 30, 2024**- \$26,251 Property Insurance (Last 5 Years), \$4,500 Alarm System (Last 5 Years), \$5,001 Elevator Maintenance, \$5,129 HVAC Maintenance (Last 5 Years), \$5,579 Contractual (Last 5 Years), \$152 Maintenance Tools (Last 5 Years) , \$1,710 Maintenance Materials (Last 5 Years) Arsenal Restrooms and Windows Project \$501,641, \$235,004 Arsenal Roof Project, \$22,681 Hurricane Window Shutters, \$1,210 Property Taxes (Last 5 Years)
- Total Expenses= \$808,858
- **Return on Investment (ROI)** = $(\$1,731,900 - (\$1 + \$686,171)) / \$1 = \$1,045,728 / \$1 = 104,572,800\%$

3. Improved Properties

USCB/South Coast Cyber Center- 1100 Boundary Street

R120 004 000 0068 0000

- **Primary Use of Facility**- USCB Cybersecurity Program and South Coast Cyber Center
- **Date of Acquisition**- 12/29/2021
- **Initial Cost**- \$2,300,000 through issuance 2021 General Obligation Bond
- **Current Value**- \$4,523,500 from 2023 Property Tax Bill
- **Revenues through June 30, 2024**- \$500,000 from Beaufort County ARPA Funds, \$150,000 State Appropriation, \$25,000 MASC Grant, \$4,898 Rent

- Total Revenues= \$679,898
- **Expenses through June 30, 2024-** \$500,000 to USCB for HVAC improvements, \$150,000 Cyber Lab Project, \$25,000 Reception Upfit, \$2,477 JCI HVAC Inspection, \$1,500 Appraisal, \$11,633 Structural Assessment, \$225 Signs, \$34,080 Property Insurance, \$633 Alarm System, \$10,530 Electrical, \$612 Water, \$393 Telephone, \$2,088 Property Taxes, Portion Related to Bond Interest (\$168,640* (2,300,000/5,375,000)) \$72,162
- Total Expenses= \$811,333
- **Return on Investment (ROI) =** $(\$4,523,500 - (\$2,300,000 + \$131,454)) / \$2,300,000 = \$2,092,046 / \$2,300,000 = 90.9\%$

4. Unimproved Properties

Former Coffee Shop- 2153 Boundary Street

R122 001 000 271A 0000

- **Primary Use of Land-** Potential Connection for Parallel Road Project
- **Date of Acquisition-** 5/1/2020
- **Initial Cost-** \$200,000
- **Current Value-** \$372,600 from 2023 Property Tax Bill
- **Revenues through June 30, 2024-** None
- Total Revenues= \$0
- **Expenses through June 30, 2024-** \$1,770 Property Taxes
- Total Expenses= \$1,770
- **Return on Investment (ROI) =** $(\$372,600 - (\$200,000 + \$1,770)) / \$200,000 = \$170,830 / \$200,000 = 85.4\%$

4. Unimproved Properties

Former Stump Man Property- 2635 Boundary Street

R100 029 000 002C 0000

- **Primary Use of Land-** City Civic Master Plan proposes the creation of the Beaufort River Regional Greenway with Boundary Street Greenway Entrance
- **Date of Acquisition-** 9/29/2023

- **Initial Cost-** \$231,267
- **Current Value-** \$250,000 from 2024 Notice of Assessment of Real Estate 2024 Tax Year
- **Revenues through June 30, 2024-** None
- Total Revenues= \$0
- **Expenses through June 30, 2024-** \$29 Property Taxes, \$600 Public Works Maintenance (2 Employees X \$25/HR X 12 months X 1 Hour/Month)
- Total Expenses= \$629
- **Return on Investment (ROI) =** $(\$250,000 - (\$231,267 + \$629)) / \$231,267 = \$18,104 / \$231,267 = 7.8\%$

Beaufort Commerce Park- 28 acres (14 purchased/14 donated)- \$417,300- September 2019

Beaufort Commerce Park- \$1,850,000- 209 acres- May 2012

5. Commerce Park

Beaufort Commerce Park

R120 024 000 0407 0000- 73 Schein Loop

AIN: 12989583- \$2,119 Property Taxes

R120 024 000 0408 0000- 57 Schwartz Road

AIN: 12989592- \$204 Property Taxes

R120 024 000 0409 0000- Beaufort Industrial Park

AIN: 12989609- \$113 Property Taxes

R120 020 000 0267 0000- Beaufort Industrial Park

AIN: 12989618- \$204 Property Taxes

R120 020 000 0268 0000- Beaufort Industrial Park

AIN: 12989627- \$160 Property Taxes

R120 020 000 0270 0000- 38 Schwartz Road

AIN: 12989636- \$603 Property Taxes

R120 020 000 0269 0000- 90 Schork Road

AIN: 12989654- \$485 Property Taxes

R120 024 000 0447 0000- 57 Schwartz Road- Oliver's Clean Burn

AIN: 242009146- \$9,642 Property Taxes

R120 024 000 0453 0000- Tract A Beaufort Commerce Park

AIN: 242016232- \$134 Property Taxes

R120 024 000 0449 0000- Schork Road

AIN: 242010717- \$171 Property Taxes

- **Primary Use of Facility-** Beaufort Commerce Park
- **Date of Acquisition-** Initial 209 acres purchase May 2012 and an additional 28 acres (14 purchased and 14 donated) September 2019 (Ordinance 15-19- General Fund)
- **Initial Cost-** \$1,850,000 through issuance of 2012 General Obligation Bond and \$417,300 in September 2019 for total initial cost of \$2,267,300
- **Current Value-** \$901,000 for 73 Schein Loop from 2023 Property Tax Bill, \$403,300 for 57 Schwartz Road, \$656,600 for Beaufort Industrial Park, \$428,900 for Beaufort Industrial Park, \$57,500 for Beaufort Industrial Park, \$1,316,800 for 38 Schwartz Road, \$1,175,000 90 Schork Road, \$627,200 for 57 Schwartz Road, \$284,900 for Tract A, \$269,500 for Schork Road= Total 2023 Property Tax Assessed Value= \$6,120,700
- **Revenues through June 30, 2024-** \$340,000 Capital Grants for Schein Loop Project (\$140K LEDA Beaufort County Funds and \$200,000 Hargray Funds), \$130,924 Rent-Oliver's Last 5 Years, \$44,243 Property Tax Reimbursement- Oliver's Last 5 Years, \$37,880 Blue Star Property Sales, \$88,800 Magnus Property Sales, \$304,488 Project Laundry Property Sales, \$208,650 Parcel A Property Sales,
- Total Revenues= \$1,154,985
- **Expenses through June 30, 2024-** \$295,561 Capital Expenses for Schein Loop Project (\$75,000 Hargray and \$220,389 to Lane Construction for Schein Loop Paving) , Beaufort County Economic Development Corp. Distribution- \$155,000

(Last 5 Years) \$69,175 Property Taxes (Last 5 Years), Bond Interest \$225,564 (10 Year at 2.11%)

- Total Expenses= \$745,300
- **Return on Investment (ROI) =** $(\$6,120,700 - (\$2,267,300 - \$409,685)) / \$2,267,300 = \$4,263,085 / \$2,267,300 = 188\%$
- Beaufort Commerce Park Analysis from Regional Economic Analysis Laboratory (REAL) from Clemson University. Report dated 1/2/24.

6. Cell Phone Tower

16 Burton Hill Road

R122 029 000 0132 0000

AIN: 00168482

Primary Use of Land- Wireless communications cell tower

- **Date of Acquisition-** Communication tower was constructed in 1999. (AT&T Lease until 2045 and T-Mobile lease until 2050)
- **Initial Cost-** Unknown, will assume \$100,000 for ROI calculation
- **Current Value-** \$300,000 from recent offers from interested parties
- **Revenues through June 30, 2024-** \$23,805/Yr from MD7 Capital and \$12,600/Yr from AT&T for total of \$36,405/Yr
- Total Revenues= \$182,025 Total last 5 Years
- **Expenses through June 30, 2024-** \$20,810 Property Insurance (Last 5 Years), \$26,590 Legal Fees (Last 5 Years)
- Total Expenses= \$47,400 Total last 5 Years
- **Return on Investment (ROI) =** $(\$300,000 - (\$100,000 - \$134,625)) / \$100,000 = \$334,625 / \$100,000 = 334\%$
- Long-term lease agreements in place with cell phone carriers.

List of Unimproved Properties Not Included in ROI Presentation

ID #	PROPERTY ID	Purchase Cost	Current Assesed Value	LOCATION
1	R100 024 000 006B 0000	\$ 1	\$ 60,000	EXEMPT DB02021794 (FORMER PUMP STATION NOT IN CITY LIMITS)
2	R100 025 00A 0093 0000	\$ 1	\$ 25,000	WELL SITE BLK C ROSEIDA S/D
3	R100 026 00A 0202 0000	\$ 100,000	\$ 500	1410 Palmetto Drive (Polk Street behind Chic-Fil-A)
4	R120 001 000 0147 0000	\$ 1	\$ 70,000	1807 MORRIS ST PARCELS 147 THRU 151
5	R120 001 000 0152 0000	\$ 1	\$ 70,000	1817 MORRIS ST
6	R120 001 000 0275 0000	\$ 1	\$ 500	{Open Land Trust} BATTERY CREEK OPEN SPACE
7	R120 001 000 0279 0000	\$ 1	\$ 500	15" ESM POR LOT 47 SEC 31 1N1W PB50 P17 1/95 0.08 AC ADDED 1/273
8	R120 001 000 0293 0000	\$ 1	\$ 175,000	NORTH PARK FOR LOTS 32 33 SEC 31 1N1W PB9 P6
9	R120 002 000 0045 0000	\$ 1	\$ 500	CITY PARK & BOAT RAMP, PIGEON POINT ROAD @ WILSON DRIVE
10	R120 002 000 0093 0000	\$ 10	\$ 800	{should be no charge alley}20' ALLEY LAFAYETTE STREET S/D FKA LOT 4-7 S 1/2
11	R120 002 000 0250 0000	\$ 1	\$ 112,500	RIVER ADD NEAR BASIL GREEN PARK VACANT
12	R120 002 000 0420 0000	\$ 9,000	\$ 500	ACCESS TO PIGEON POINT PARK: POR LOT 1 BLK D A POR OF GODFREY STREET PLAT ATTACHED DB3278 P2614
13	R120 002 000 0427 0000	\$ 10	\$ 500	GREENSPACE A LAFAYETTE STREET S/D PB140 P14
14	R120 002 000 0428 0000	\$ 10	\$ 500	GREENSPACE B LAFAYETTE STREET S/D PB140 P14
15	R120 003 000 0276 0000	\$ 60,000	\$ 153,300	411 RIBAUT RD RIBAUT ROAD OPEN SPACE LOTS 23 25 27 BLK M BEAUFORT DEV S/D (DORMAT)
16	R120 003 000 0410 0000	\$ 1	\$ 500	TICK TOCK PARK
17	R120 003 000 0579 0000	\$ 1	\$ 200	{Open Land Trust} 1802 BAY ST WILLS F126 K286 BAY OF BLUFF OPEN SPACE
18	R120 003 000 242A 0000	\$ 1	\$ 259,200	LOGAN PARK - JUNCTION OF NORTH STREET DEPOT ROAD AND BAY ST.
19	R120 003 000 579A 0000	\$ 1	\$ 100	{Open Land Trust} BAY ST BLUFF
20	R120 004 000 0031 0000	\$ 115,000	\$ 500	{Open Land Trust} BELLAMY CURVE OPEN SPACE (BOUNDARY ST)
21	R120 004 000 0033 0000	\$ 1	\$ 800	{Open Land Trust} BELLAMY CURVE OPEN SPACE
22	R120 004 000 0111 0000	\$ 1	\$ 322,400	{Open Land Trust} 1101 CARTERET ST PARCELS A B PB53 P103 BELLAMY CURVE OPEN SPACE, NEAR USCB
23	R120 004 000 0221 0000	\$ 1	\$ 164,300	{Open Land Trust} 500 CONGRESS ST CITY BLK 30 CARTERET ST OPEN SPACE NEAR USCB
24	R120 004 000 032A 0000	\$ 1	\$ 500	{Open Land Trust} BELLAMY CURVE OPEN SPACE
25	R120 004 000 0741 0000	\$ 1	\$ 117,600	500 KING ST HARVEY PARK
26	R120 004 000 0747 0000	\$ 1	\$ 500	POINT POND
27	R120 004 000 0817 0000	\$ 1	\$ 74,700	ARSENAL GRASS NE CORNER CARTERT & SCOTT ST
28	R120 004 000 0844 0000	\$ 1	\$ 99,400	1113 BAY ST SUCCESSION PARK
29	R120 004 000 0904 0000	\$ 110,000	\$ 100	FREEDOM PARK
32	R120 004 000 0961 0000	\$ 1	\$ 1,500	CANNON PARK
33	R120 004 000 1029 0000	\$ 1	\$ 882,200	(Libray Parking Lot)PARKING LOT BEHIND 302 CARTERET STREET, PART OF PUBLIC LIBRARY PARKING LOT BEHIND OLD CITY HALL BLOCK 48 BEAUFORT
34	R120 005 000 0392 0000	\$ 1	\$ 77,000	PARCEL 1 POR OF FULLER STREET TRACT PB105 P185 FICA POR LOTS 174-175, 177-178 HUNDRED PINES S/D PB62 P62 12/05 2.88 AC S/406.408
35	R120 005 000 0408 0000	\$ 1	\$ 500	PARCEL 2 POR OF FULLER STREET TRACT PB105 P185 (FULLER ST) *6/05 ESMT GRANTED I DB2167 P1303
36	R120 005 000 288A 0000	\$ 1	\$ 500	DETENTION AREA JERICO WOODS PH 11 PB57 P110 PB31P159 PB56 P45 SPLIT 7/85 1.84 AC PH1 6/395 '04230809 SPLIT 4/97 5.43 AC 5/376-391 6/479-488
37	R120 006 000 0324 0000	\$ 1	\$ 500	DOWLING PARK POND
38	R120 006 000 0373 0000	\$ 1	\$ 500	RIGHT OF WAY FOR JOSHUA COURT (PAR B POR COTTAGE FARM PB31 P159 PB44 P204 *SPLIT 7/93 0.27 AC 6/436 SPLIT 7/93 0.29 AC 6/437 SPLIT 2/94 5.66 AC 6/439-441-443-477 1.50 AC INCL RD R/W)
39	R120 006 000 0469 0000	\$ 1	\$ 54,000	2601 JOSHUA CIR RETENTION POND JERICO WOODS S/D REVISED PLAT PB55 P3 1/96 ACCT RESTORED ACCT INACTIVE FOR 94 TAX YR
40	R120 006 000 0470 0000	\$ 1	\$ 500	RETENTION POND JERICO WOODS S/D REVISED PLAT PE55 P3 1/96 ACCT RESTORED ACCT INACTIVE FOR 94 TAX YR
41	R120 006 000 0503 0000	\$ 1	\$ 500	OPRN SPACE PARK DET POND BROAD STREET S/D PH1
42	R120 006 000 0504 0000	\$ 1	\$ 500	OS PARK BROAD STREET S/D PH1 MOSSY OAKS PB59 P38
43	R120 006 000 0505 0000	\$ 1	\$ 2,400	BROAD STREET LAWTON FARM LANE BROAD STREET S/D PH 1 MOSSY OAKS PB59 P38
44	R120 006 000 0525 0000	\$ 2,000	\$ 500	THIS IS A ROAD (STORMWATER CHANGING) POR OF MOSSY OAKS S/D PLAT IN DB1050 P130 COLEMAN LANE R/W TAKING
45	R120 007 000 0390 0000	\$ 1	\$ 500	1141 RIBAUT RD CALHOUN THOMAS PARK (LOT 8 BLK E SPANISH POINT S/D PB111 P118)
46	R120 007 000 0685 0000	\$ 1	\$ 500	POR LOT 1 VERDIERS BLUFF PLAT IN DB568 P27 (STREET ROW ON VERDIERS BLUFF)

47	R120 008 000 0630 0000	\$ 10	\$ 500	PB76 PG76 SOUTH SIDE PARK
48	R120 026 000 0175 0000	\$ 1	\$ 500	{Open Land Trust} PARCEL A BATTERY CREEK OPEN SPACE
49	R120 026 00A 0195 0000	\$ 1	\$ 500	1411 PALMETTO DR LOT 13BLK A WOODLAWN 'ANNEX INTO THE CITY BY ORDANCE # O-05-07 10/11LOT LINE REV 0.07 AC ADDED TO 26A/196PB123P194
50	R120 029 00C 0091 0000	\$ 1	\$ 500	1148 OTTER CIR BATTERY SHORE RET/DET POND DRAINAGE ESMT/OTTER CIRCLE PINE MARTIN RD BEAVER'S DEN. WOLVERINE DR MUSTELIOAE RD PB61 P177
51	R120 029 00C 0177 0000	\$ 1	\$ 5,600	BATTERY SHORES, RIGHT-OF-WAY (CITY OWNS THESE STREETS) per Libby aquired 2014
52	R122 001 000 0298 0000	\$ 10	\$ 500	This is a Road behind Starbucks and Wayback Burgers. LOVE JOY WAY BOUNDARY ST.. ROADWAY PB140 PG131 (Purchased 04/10/15 from Town Center Inn LLC)
53	R122 026 000 125A 0000	\$ 770,000	\$ 500	{this is now a street} POLK STREETSPLIT (FORMALLY KFC) 10/87 1 46 AC 26/ 170* SPLIT 02/19 0.04 AC 26/308 (EMINIT DOMAIN 04/09/18)
54	R122 026 000 125B 0000	\$ 175,000	\$ 145,000	2413 BOUNDARY STREET HWY 21 DB011302041/2 RD R/W MGF.M.KEY #157573 (PURCHASED 2016)
55	R122 026 00A 0025 0000	\$ 1	\$ 500	0.22 acre for stormwater fee (mainly road not much property) 3001 POLK ST FUTURE ROAD FOR POLK ST EXTENTION (LOT 1-K N M POLK S/D *ANNEX INTO CITY BY ORDINANCE #0-49-98)
56	R122 026 00A 0100 0000	\$ 550,000	\$ 105,300	2240 BOUNDARY ST.. LOT 4 NEIL TRASK FARM PLAT (Pruchased 06/08/16 from Rivers Pickers LLC)(old Sea Eagle)
57	R122 026 00A 0101 0000	\$ 525,000	\$ 194,400	2234 BOUNDARY STREET (WENDY'S) [PURCHASED FROM CRG REAL ESTATE, VENDOR 6057 DATE 04/28/2021
58	R122 026 00A 0102 0000	\$ 1	\$ 121,700	{Open Land Trust } 2226 BOUNDARY ST BATTERY SAXTON PARK (CONDEMNATION #119369 DEMO PERMIT ISSUED 06/25/02)
59	R122 026 00A 0295 0000	\$ 175,000	\$ 500	CONNECTED/NEXT TO 2413 BOUNDARY STREET HWY 21 (PURCHASED 2016)
60	R122 026 00A 102A 0000	\$ 1	\$ 148,800	{Open Land Trust}2228 BOUNDARY ST. BATTERY SAXTON PARK (S POR LOT 1 NEIL TRASK S/D PLAT FILE WITH JR#118767)
61	R122 029 000 0210 0000	\$ 10	\$ 500	COMMON AREA RD R/W PB54 P161 -
62	R122 029 000 108J 0000	\$ 1	\$ 2,000	BURTON HILL ROAD EXT R/W PB39 P143
Total		\$ 2,591,103	\$ 3,460,300	



January 2, 2024

Beaufort Commerce Park Analysis

This analysis examines the impact of the City of Beaufort Commerce Park on Beaufort County, South Carolina. The model assumes construction and investment in equipment to occur in the first year of the analysis (2024); it further assumes that all the firms locating to the park will be operational in the second year (2025).

The economic and fiscal impact was modeled using the REMI PI⁺ modeling engine and CU-REAL's Fiscal Impact Analysis Tool. The model includes the initial investment in real estate, construction, and equipment and the operational phase of the firm. Capital expenditures and direct employment data were provided by Beaufort County Economic Development Corporation.

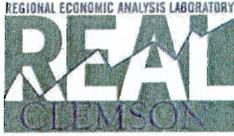
The metrics used in this analysis are the following. All dollar amounts are stated in constant 2022 dollars to control for inflation.

- Employment – Jobs created, including direct jobs (i.e., those directly employed by firms locating to the park) plus indirect and induced jobs created within the county.
- Compensation – Aggregated impact on annual income from wages and salaries, including fringes, for all workers employed in the county.
- Output (Total Sales) – The dollar value of all goods and services produced in the county in each year.
- Net Local Government (Fiscal) Impact – The impact on annual local government revenues net of the impact on expenditures. Note that fiscal impacts do not account for any inducements.

Investment Impact: We estimate a total economic impact to Beaufort County from construction and related investment spending of 129 jobs during the investment phase. The impact on compensation during the assumed one year of capital expenditures is projected to be \$6.2 million. The impact on output in that year is projected to be \$25.5 million.

If an additional project, "Project Crab", is realized, the total impact during this year increases to 214 jobs during the investment phase. The impact on annual compensation and output during this phase is projected to be \$10.3 million and \$42.1 million, respectively. The impact on net local government revenue in the county is projected to be \$447,000 in that year.

Operational Impact: The impact of these firms results from direct sales by the firm, employee wage income, and purchases from local vendors and other suppliers. Total employment impact is projected to be around 344 jobs in Beaufort County; the estimated employment multiplier (the ratio



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of total to direct employment impact) during this operational phase is **1.45**.

The annual impact on total compensation is projected to be approximately \$14.2 million. Annual output (total sales) is projected to be approximately \$54.2 million.

The impact on local governments in Beaufort County is projected to be approximately \$479,000 during this operational period.

If Project Crab is realized, the total impact during the operational phase would increase to 406 jobs (making the employment multiplier **1.42**), an annual impact on compensation of \$16.8 million, and an impact on annual output of \$58.3 million. The net impact on local government revenue would be approximately \$492,000.

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