

# ACCOMMODATIONS TAX APPLICATION

2024-2025



CITY OF BEAUFORT

## TOURISM DEVELOPMENT ADVISORY COMMITTEE

This Grant Application is for funding from the Finance Department Accommodations Tax Fund (BATF). It will be reviewed by the Tourism Development Advisory Committee (TDAC). The TDAC will make funding recommendations to the Beaufort City Council. Beaufort City Council makes all final BATF grant determinations for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants at Beaufort City Hall, 1911 Boundary Street, **Community Development Conference Room on Wednesday, August 28, 2024 at 2:00 PM and Friday, August 30, 2024 at 10:00 AM.** The purpose of the workshops is to assist potential applicants with process of completing the application, review the applicant evaluation method and identify other organizations for collaboration opportunities for Accommodations Tax funds. It is mandatory for all applicants to attend one of the two workshop sessions. **All applications must be fully completed and received by Friday, September 13, 2024, at 4:00 PM. Applicant presentations are scheduled for Friday, October 11, 2024, at 9:00 AM to 4:00 PM in the City Council Chambers.**

Completed applications can be delivered to City of Beaufort, Finance Department, 1911 Boundary Street, Beaufort, SC 29902, Attention: ATAX Administrator. Applications may also be sent by email to the following address: [jphillips@cityofbeaufort.org](mailto:jphillips@cityofbeaufort.org). Submit one (1) portable document format (pdf) file as an email attachment. After sending the email, applicants must send a separate email without an attachment to advise that an application has been submitted. Applicants will receive a reply to confirm receipt or additional instructions to complete the submission. A file sharing platform (i.e., Dropbox, MS OneDrive) may be used due file size limitations. For more information contact the ATAX Administrator at (843) 525-7071.

# ACCOMMODATIONS TAX FUNDS APPLICATION INSTRUCTIONS

## Policies and Procedures

1. All areas of the application must be completed. Incomplete applications will be deemed unresponsive and will not be considered for funding.
2. If your organization received funding last year, a copy of the financial statement for this project must accompany your application.
3. Funding generally is of the reimbursement method; with appropriate back-up (i.e., signed contract(s), paid invoices, canceled checks, etc.).
4. Applications may be submitted in hard copy format or by email as an attachment in Portable Document Format (PDF).
5. Accommodation tax funds are for use by non-profit organizations, 501C3 and 501C6.
6. Accommodation tax funds may not be awarded purely on local functions.
7. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
8. All organizations receiving Accommodation Tax funding are subject to an audit.
9. A reimbursement request form must be submitted upon completion of the project. Recipients must provide a final accounting for the project, copies of all invoices and canceled checks showing payment, and a completed final evaluation report that includes:
  - a. Percentage of Tourism generated by the event or project;
  - b. Total attendance to the event or project;
  - c. Overall budget of the event or project;
  - d. Description of how the event or project attracts and promotes tourist to the area.
10. **Any profit derived from your program/event may be deducted from your final grant reimbursement check pending the review of the reimbursement request or pending an audit.**
11. Expectation is that organizations would work toward financial autonomy or other funding sources.

## Guidelines for Tourism

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity;
  - b. promotion of the arts and cultural events;
  - c. construction, maintenance, and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities;
  - d. the criminal justice system, law enforcement, fire protection, solid waste collection, and health facilities when required to serve tourists and tourist facilities. This is based on the estimated percentage of costs directly attributed to tourists;
  - e. public facilities such as restrooms, dressing rooms, parks, and parking lots;
  - f. tourist shuttle transportation;
  - g. control and repair of waterfront erosion, including beach re-nourishment;
  - h. operating visitor information centers.
2. "Travel" and "Tourism" mean the action and activities of people taking trips outside their home communities for any purpose, except daily commuting to and from work. "Tourist" is generally

defined as those who travel at least 50 miles to attend an event.

3. Applicants must be able to substantiate how much of the total expenditure is related to tourism, and must be able to provide the “percentage of tourism” to the total budget of the project.
4. The expenditure must be used for marketing and other qualified expenses directed toward increasing hotel/motel room nights (overnight visitors) and toward bringing people to Beaufort from outside the metropolitan area.
5. Individual organizations with a similar focus, constituency, or concern should work together within the framework of the designations below that are a part of the makeup of the Beaufort community. ATAX funding will be awarded to groups showing a willingness to coordinate their marketing efforts in conjunction with The City’s DMO (Designated Marketing Organization). These ‘sub-brands’ are:
  - a. History & Culture – can include the history and culture of Beaufort; the Beaufort Historic District; history of the Gullah people and culture on the Sea Islands; the Gullah/Geechee Corridor; military history of the Beaufort Area; etc.
  - b. Events & Festivals – includes events and festivals of one day or longer that bring individuals from outside the Beaufort area.
  - c. The Arts – events and activities to support, promote, and highlight the arts in Beaufort. Includes visual, performing, and literary arts, etc.
  - d. Outdoor Recreation – includes watersports, golf, local recreational areas, etc.

The expenditure may not be used for an item that would normally be provided by the county or municipality.

6. Allowable expenses include:
  - a. Development of new events or major exhibits and activities.
  - b. Promotional activities that compliment advertising, including materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focusing on attracting visitors to Beaufort (print, broadcast, outdoor, digital).
  - d. Advertising buys must include markets more than 50 miles from Beaufort or with broadcast radius of 50+ miles. Local media outlets do not normally meet the intended purpose of the grant and will receive less consideration than media outlets located 50+ miles outside of Beaufort.
  - e. No more than 30% of grant funds may be used for postage.
7. **To maximize the awarded dollars and for the best use of marketing funds all applicants who receive grants for “Marketing and Promotion” for ad buys should be coordinated with the DMO and should fit within the DMO’s current advertising plan. It is critical to note, the DMO is not using its awarded Accommodations Tax Grant or “Advertising and Promotional Fund” to execute ad placements for Accommodations Tax Grant applicants.**
8. Organizations applying for funding must list any other Accommodations Tax funding they have requested or received from other municipalities or counties for the same funding year.
9. Grant recipients are required to include certain materials of the City of Beaufort’s Designated Marketing Organization in all of their marketing material:
  - a. Organizations receiving ATAX Grant funding must have a reciprocal link on their website to the designated DMO. The consumer must be able to reach the DMO website in one click.
  - b. Inclusion of the DMO logo on printed pieces and any call-to-action.
  - c. The DMO must be listed as a sponsor in the event program and must be included in any call-to-action.
  - d. The addition of the DMO logo in banner ads with call-to-action.

10. Organizations out of compliance with deadlines and required procedures will result in possible penalties.
- a. Failure to use funds as specified in the contract may result in penalties up to and including a full refund of grant funds.
  - b. Failure to follow the agreed upon procedures and submission of final the report by the deadline is unacceptable and may result in penalties up to and including a full refund of grant funds.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified as eligible to receive TDAC A-Tax Grant Funds for two years.
  - d. Applicants that are holding events during the off-season (3rd week of July to the end of Sept. and 3rd week of Nov. to 1st week of March) will be reviewed more favorably.
  - e. All applicants are required to present an overview of their funding request to the TDAC.

**Grant Review Criteria – Applications are evaluated and scored based on the following areas:**

1. **Impact on Tourism**
  - a. **What is the anticipated attendance (number) or number of people who will benefit from this project/event?**
  - b. **How many of the above are anticipated to be tourists (as defined by the guidelines)?**
  - c. **Describe how the impact on tourism will be evaluated and measured. Describe how tourist attendance will be measured or documented?**
  - d. **If requesting marketing or promotional funding, describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain why marketing or promotional concepts to be funded are the best or most effective, and how this determination was made.**
2. **Coordination and collaboration to leverage impact**
  - a. **How will the applicant coordinate the proposed project or event with other organizations, activities, or events to leverage impact?**
  - b. **What commitments are in place from others related to coordination and collaboration with the proposed project?**
  - c. **Describe how your marketing plan and event fits into one of the DMO's 'sub-brands for tourism' (Arts, Events & Festivals, History & Culture, Outdoor Recreation).**
3. **Fiscal stability and Administrative Ability**
  - a. **Provide a description of the applicant's organizational structure, operating budget, and history with similar projects or events.**
  - b. **What are the organization's goals? How does this project or event fit with the organization's mission?**
  - c. **Explain how project or event expenses will be covered until reimbursement is received.**
4. **Budget**
  - a. **As part of the application each applicant must submit their event or project budget on the provided budget document. The score will be a result of the review and understanding of the budget.**
5. **Prior History and success with City of Beaufort ATAX grants.**

**Prior ATAX grants received from the City of Beaufort in the past 5 years. Identify the project and amount awarded.**

  - a. **Describe the success and/or obstacles in carrying out the project, what was learned.**
  - b. **What was the impact on tourism, including number of tourists involved and how they were documented?**



# 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: \_\_\_\_\_

2. Mailing Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Postal Code \_\_\_\_\_

3. Project Director: \_\_\_\_\_

Project Treasurer or Administrative Official: \_\_\_\_\_

Telephone #: \_\_\_\_\_ Email: \_\_\_\_\_

4. Event or Project Name: \_\_\_\_\_

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.

\_\_\_\_\_

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 \_\_\_\_\_ 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): \_\_\_\_\_

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

Accommodation Tax Funds Requested: \$ \_\_\_\_\_

Project Funding from Other Sources: \$ \_\_\_\_\_

9. Source of Applicant's Other Funds: \_\_\_\_\_

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

Total "tourist" anticipated? \_\_\_\_\_

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

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**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:** \_\_\_\_\_

## 2024-25 ATAX REVENUE & EXPENSE BUDGET

<b>Event/Project Projected Revenues</b>	
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)	
<b>Total Revenues</b>	
<b>Event/Project Projected Expenses</b>	
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)	
<b>Total Projected Revenues</b>	
<b>Event/Project Projected Profit or Loss</b>	

