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**City of Beaufort**  
1911 Boundary Street  
Beaufort Municipal Complex  
Beaufort, South Carolina 29902  
(843) 525-7070

**City Council Worksession Meeting Agenda  
October 14, 2025**

**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."

**Worksession Meeting - Planning Conference Room - 5:00 PM**

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

- I. Call to Order - Philip Cromer, Mayor**
- II. Employee New Hire Recognition**
  - A. Municipal Court - Annalyse Garvey
- III. Presentations**
  - A. Waterfront Advisory Committee Report to Council
- IV. Discussion**
  - A. Public Works Contracting Services Compared to In-House Services
  - B. Tourism Development Advisory Committee (TDAC) State Accommodations Tax Grant Award Recommendations
  - C. Public Camping Ordinance Proposed Update
  - D. Short Term Rental Discussion
- V. Adjourn**



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**City of Beaufort**  
Department Request for City Council Agenda Item

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**To:** City Council **Date:** 10/08/2025  
**From:** Scott Marshall, City Manager  
**Item Name:** Waterfront Advisory Committee Report to Council  
**Meeting Date:** October 14, 2025  
**Department:** City Managers Office

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**Background Information:**

**Introduction:**

The Waterfront Advisory Committee (WAC) was appointed pursuant to City of Beaufort Resolution 2025/12, a copy of which is attached to this report. This body is tasked with serving City Council in an advisory capacity and to provide recommendations to City Council on decisions impacting Henry C. Chambers Waterfront Park and the Downtown Marina. In the enabling Resolution, the WAC is directed to provide an update to City Council at its October 14, 2025 meeting.

**Background:**

The WAC has met on the following days in 2025: June 2, June 23, August 4, September 2, September 24 and October 2.

The update will be provided by Joe Oliver, who chairs the WAC, and will be included in the minutes of this Council Meeting.

**Legal Authority:**

South Carolina Code of Laws § 5-7-30 and § 5-7-40

City of Beaufort, South Carolina Resolution 2025/12

**Staff Recommendation:**

Not Applicable

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**Placed on Agenda For:**

**Attachments:**

1. WAC Enabling Resolution

RESOLUTION 2025/12  
A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BEAUFORT, SOUTH  
CAROLINA, ESTABLISHING DIRECTIVES FOR THE WATERFRONT PARK  
ADVISORY COMMITTEE

WHEREAS, the City of Beaufort is the owner and steward of the Henry C. Chambers Waterfront Park and adjacent Downtown Marina, which together serve as critical assets for public recreation, tourism, and economic vitality; and

WHEREAS, the City Council established the Waterfront Park Advisory Committee (“the Committee”) to serve in an advisory capacity, supporting the City’s efforts to evaluate long-term infrastructure needs, public access considerations, and strategic improvements to the waterfront; and

WHEREAS, recent engineering reports have documented significant structural concerns with the Relieving Platform and Seawall at the Waterfront Park, necessitating phased planning and design to ensure public safety, regulatory compliance, and long-term sustainability; and

WHEREAS, the current marina management arrangement, public use agreements, and underlying federal covenants affecting land use require coordinated review and advisory input to inform future City decisions;

NOW, THEREFORE, BE IT RESOLVED, by the City Council of the City of Beaufort, South Carolina, that the Waterfront Park Advisory Committee is hereby directed to undertake the following areas of review and provide findings, options, and recommendations back to City Council no later than October 1, 2025:

**Section 1. Engineering Evaluation**

- I. Review the findings of the 2024 Structural Evaluation and the scope of Phase 1A engineering studies.
- II. Collaborate with staff and consultants to understand the full range of potential design options for repair, reconstruction, or enhancement of the Relieving Platform and Seawall.
- III. Recommend criteria for evaluating future phases (e.g., cost, life cycle, risk mitigation, permitting impact).

**Section 2. Marina Operations and Public Access**

- I. Review the current lease agreement with Safe Harbor Marinas and its consistency with public access goals and federal Land and Water Conservation Fund (LWCF) obligations.
- II. Identify opportunities to enhance public benefit and recreational access through the marina and associated partnerships.

- III. Explore and recommend policies for aligning commercial and community interests within the marina area.

**Section 3. Community and Stakeholder Engagement**

- I. Solicit input from key stakeholders including local business owners, residents, visitors, and relevant state or federal agencies.
- II. Identify methods to increase public participation in decisions affecting the park and marina.

**Section 4. Reporting Requirements**

- I. Provide a formal written report on these directives to City Council no later than October 1, 2025, for review and discussion at the October 14, 2025, City Council Worksession.
- II. Present interim findings as requested by the City Manager or Council.
- III. Coordinate closely with the City Manager's Office and designated staff liaisons throughout the process.

RESOLVED THIS 13<sup>th</sup> DAY OF May, 2025, by the City Council of the City of Beaufort, South Carolina, in regular session duly assembled.

SIGNED:

  
\_\_\_\_\_  
Philip E. Cromer, Mayor

ATTEST:

  
\_\_\_\_\_  
Traci Guldner, City Clerk

APPROVED AS TO FORM: Ben Coppage, City Attorney





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**City of Beaufort**  
Department Request for City Council Agenda Item

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**To:** City Council **Date:** 10/07/2025  
**From:** Alan Eisenman, Finance Director, Nathan Farrow, Public Works Director  
**Item Name:** Public Works Contracting Services Compared to In-House Services  
**Meeting Date:** October 14, 2025  
**Department:** Finance Department

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**Background Information:**

**Introduction:**

The City would like to pursue having street sweeping and facilities maintenance in-house, rather than contracting through a third-party.

**Background:**

The City issued Request for Proposals for Street Sweeping and Facilities Maintenance that came back much higher than budgeted for in fiscal year 2026.

**Legal Authority:**

N/A

**Staff Recommendation:**

Staff would like to bring forward a fiscal year 2026 budget amendment for Council's consideration in the November and December meetings. This will allow the in-house services to begin January 1, 2026 by Public Works Department.

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**Placed on Agenda For:**

**Attachments:**

1. Public Works Contracting Compared to In House Presentation

# City of Beaufort, South Carolina



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## PUBLIC WORKS CONTRACTING SERVICES COMPARED TO IN HOUSE SERVICES PRESENTATION

OCTOBER 14, 2025

# Background

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- City issued RFPs for Street Sweeping and Facilities Maintenance
  - The bids came back much higher than budgeted for FY26.
- City would like to pursue having these services in house, rather than contracting through a third-party provider.

# Benefits of In-House Services

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- Employees report to Public Works Director
  - Improved ownership of work
  - Better attention to detail
- Cost Savings over 5-year contract

# Street Sweeping

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- Hire new FTE- Associate II position with 2.5% Annual COLA
- Purchase of New Sweeper Truck- 5 Year Lease to Own Financing
- FY26 Budget was \$70,000
- Lowest Bid received was:
  - \$140,000 for Years 1 to 3
  - \$147,000 for Year 4
  - \$154,350 for Year 5

# Street Sweeping Projected Costs

| Year         | Contract Costs   | Employee Costs with Benefits | Equipment Costs  | Total In-House Costs | Savings In-House vs. Contract |
|--------------|------------------|------------------------------|------------------|----------------------|-------------------------------|
| 1            | \$70,000         | \$75,270                     | \$54,630         | \$129,900            | \$10,100                      |
| 2            | \$140,000        | \$77,152                     | \$54,630         | \$131,782            | \$8,218                       |
| 3            | \$140,000        | \$79,081                     | \$54,630         | \$133,711            | \$6,289                       |
| 4            | \$147,000        | \$81,058                     | \$54,630         | \$135,688            | \$11,312                      |
| 5            | \$154,350        | \$83,084                     | \$54,630         | \$137,714            | \$16,636                      |
| <b>Total</b> | <b>\$721,350</b> | <b>\$395,645</b>             | <b>\$273,150</b> | <b>\$668,794</b>     | <b>\$52,556</b>               |

# Facilities Maintenance

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- Includes grounds maintenance at City Hall/PD/Court Complex, Fire Station Headquarters and Fire Station #2.
- Hire new FTE- Associate II position with 2.5% Annual COLA
- Purchase of New Stand On Mower- Upfront Cost in Year 1
- Nominal additional costs compared to contract in Years 2 to 5
- In-House is 5 days a week while Contract is 1-2 days per week- Better Quality of Work
- FY26 Budget was \$50,200
- Lowest Bid received was:
  - \$75,100 for Year 1
  - \$77,353 for Year 2
  - \$79,674 for Year 3
  - \$82,064 for Year 4
  - \$84,526 for Year 5

# Facilities Maintenance Projected Costs

| Year         | Contract Costs   | Employee Costs with Benefits | Equipment Costs | Total In-House Costs | Savings In-House vs. Contract |
|--------------|------------------|------------------------------|-----------------|----------------------|-------------------------------|
| 1            | \$75,100         | \$75,270                     | \$15,000        | \$90,270             | (\$15,170)                    |
| 2            | \$77,353         | \$77,152                     | \$1,000         | \$78,152             | (\$799)                       |
| 3            | \$79,674         | \$79,081                     | \$1,000         | \$80,081             | (\$407)                       |
| 4            | \$82,064         | \$81,058                     | \$1,000         | \$82,058             | \$6                           |
| 5            | \$84,526         | \$83,084                     | \$1,000         | \$84,084             | \$441                         |
| <b>Total</b> | <b>\$398,716</b> | <b>\$395,645</b>             | <b>\$19,000</b> | <b>\$414,645</b>     | <b>(\$15,929)</b>             |

# Next Steps

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- Bring forward FY26 budget amendment for Council's consideration in November and December meetings.
- In-House services will begin January 1, 2026



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**City of Beaufort**  
Department Request for City Council Agenda Item

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**To:** City Council **Date:** 10/07/2025  
**From:** Alan Eisenman, Finance Director  
**Item Name:** Tourism Development Advisory Committee (TDAC) State Accommodations Tax Grant Award Recommendations  
**Meeting Date:** October 14, 2025  
**Department:** Finance Department

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**Background Information:**

**Introduction:**

The Tourism Development Advisory Committee (TDAC) reviewed applications and conducted interviews with 21 entities on September 24, 2025. Please refer to attached summary TDAC grant recommendations.

TDAC met on September 30, 2025 to discuss their grant recommendations.

**Background:**

The State Accommodations Tax grant budget for fiscal year 2026 is \$649,420.

**Legal Authority:**

SC State Code Section 6 Chapter 4- Allocation of Accommodations Tax Revenues

**Staff Recommendation:**

Staff will bring forward TDAC's grant recommendations for Council's consideration at the November 18, 2025 meeting.

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**Placed on Agenda For:**

**Attachments:**

1. FY2026 ATAX TDAC RECOMMENDATIONS SPREADSHEET
2. FY26 Tourism Development Advisory Committee Recommendations Memo
3. APP FAVOUR CORP FY2026 ATAX

4. APP FREEDMAN ARTS DIST ATAX APP FY2026
5. APP FRIENDS OF HUNTING ISLAND ATAX FY 2025-2026
6. APP FRIENDS OF THE SPANISH MOSS TRAIL - City Atax Application 2025-2026
7. APP GULLAH TRAVELING THEATER ATAX FY 2025-2026
8. APP HABITAT FOR HUMANITY ATAX 2025-2026
9. APP MEMO GTTI Presentation Follow Up - Sept 2025
10. APP NORTHERN BEAUFORT COUNTY SPORTS ATAX FY2026
11. APP PAT CONROY LITERARY CENTER ATAX FY2026
12. APP PENN CENTER City 2025-2026 Submission Heritage Days
13. APP PENN CENTER City 2025-2026 Submission Juneteenth
14. APP PORT ROYAL SOUND FDN 2025-26 Beaufort City ATAX
15. APP SC LOWCOUNTRY TOURISM COMM ATAX FY26
16. APP SCHEPER TENNIS ACADEMY FY2026 ATAX
17. APP THE ORIGINAL GULLAH FESTIVAL ATAX FY 2025-2026
18. APP 1GREATER BEAUFORT-PORT ROYAL CVB-DMO MARKETING ATAX FY 2025-2026
19. APP 2GREATER BEAUFORT-PORT ROYAL CVB-DMO SALES ATAX FY 2025-2026
20. APP BEAUFORT AREA HOSPITALITY ASSN BEAUFORT CITY ATAX FY2026
21. APP BEAUFORT FILM SOCIETY ATAX APP FY2026
22. APP BEAUFORT HISTORY MUSEUM FY26 ATAX
23. APP BEAUFORT WATER SEARCH & RESCUE ATAX FY26
24. APP CAROLINA BIRDING CENTER OSPREY POLE ATAX FY2026
25. APP CAROLINA BIRDING CENTER WONDERS OF WINTERING BIRDS ATAX FY2026



**CITY OF BEAUFORT FY2026 ATAX GRANT AWARDS**

| <b>Applicants</b>                           | <b>Prior Year Award</b> | <b>Event</b>  | <b>Total Budget Amt.</b> | <b>Request</b>    | <b>Other Funding</b> | <b>% of Total Requested</b> | <b>Avg. Score</b> | <b>TDAC Recommendation</b> | <b>% of Request</b> |
|---|-------------------------|---|--------------------------|-------------------|----------------------|-----------------------------|-------------------|----------------------------|---------------------|
| Beaufort Film Society                       | \$ 15,000               | Beaufort International Film Festival                    | 234,000                  | <b>15,000</b>     | 60,000               | 2.73%                       | 5.00              | 15,000                     | 100%                |
| SC Lowcountry & Resort Islands Tourism      | \$ 61,800               | Promotion of the City of Beaufort and SC Lowcountry     | 901,500                  | <b>72,800</b>     | 836,200              | 13.25%                      | 4.93              | 72,800                     | 100%                |
| Port Royal Sound Foundation                 | \$ 9,500                | Interactive Garden Art Exhibit for PRSF Maritime Center | 10,500                   | <b>5,250</b>      | 5,250                | 0.96%                       | 4.91              | 5,250                      | 100%                |
| Beaufort Water Search & Rescue              | \$ 20,000               | Water Rescue Services & Water Festival Safety Patrol    | 35,000                   | <b>17,500</b>     | 17,500               | 3.18%                       | 4.80              | 17,500                     | 100%                |
| Greater Beaufort-Port Royal CVB             | \$ 40,000               | Sales Plan  | 121,500                  | <b>45,000</b>     | 76,500               | 8.19%                       | 4.79              | 45,000                     | 100%                |
| Greater Beaufort-Port Royal CVB             | \$ 160,000              | Destination Marketing                                   | 545,549                  | <b>160,000</b>    | 385,549              | 29.11%                      | 4.76              | \$ 240,000                 | 150%                |
| Freedman Arts District                      | \$ 20,000               | Chalk it Up Festival                                    | 75,869                   | <b>25,000</b>     | 80,000               | 4.55%                       | 4.63              | 20,000                     | 80%                 |
| Beaufort Area Hospitality Association- BAHA | \$ 18,000               | Beaufort Oyster Festival                                | 150,000                  | <b>30,000</b>     | 50,000               | 5.46%                       | 4.62              | 30,000                     | 100%                |
| Friends of the Spanish Moss Trail           | \$ 13,000               | Promoting the Spanish Moss Trail                        | 60,500                   | <b>12,100</b>     | 36,300               | 2.20%                       | 4.60              | 12,100                     | 100%                |
| Northern Beaufort Area Sports Council       | \$ -                    | Northern Beaufort County Sports & Cultural Facility     | 50,000                   | <b>10,000</b>     | 40,000               | 1.82%                       | 4.57              | 10,000                     | 100%                |
| Habitat For Humanity                        | \$ -                    | Turkey Trot   | 16,000                   | <b>6,424</b>      | -                    | 1.17%                       | 4.55              | 6,424                      | 100%                |
| Carolina Bight Sanctuary                    | \$ -                    | Wonders of Winter Birds                                 | 15,000                   | <b>8,500</b>      | 6,500                | 1.55%                       | 4.54              | 8,500                      | 100%                |
| Friends of Hunting Island                   | \$ 10,000               | Fresnel Lens Enhancement Project                        | 35,000                   | <b>10,000</b>     | -                    | 1.82%                       | 4.53              | 10,000                     | 100%                |
| Carolina Bight Sanctuary                    | \$ -                    | Osprey Pole & Platform                                  | 8,000                    | <b>4,500</b>      | 3,500                | 0.82%                       | 4.38              | 4,000                      | 89%                 |
| The Original Gullah Festival                | \$ 35,000               | Original Gullah Festival                                | 289,350                  | <b>50,000</b>     | 200,000              | 9.10%                       | 4.21              | 50,000                     | 100%                |
| Gullah Traveling Theatre, Inc.              | \$ 30,000               | 2025 Gullah Christmas Celebration                       | 86,318                   | <b>36,000</b>     | 55,000               | 6.55%                       | 4.18              | 33,000                     | 92%                 |
| Pat Conroy Literary Center                  |                         | Digital Marketing Support                               | 18,000                   | <b>9,000</b>      | -                    | 1.64%                       | 4.13              | 9,000                      | 100%                |
| Penn Center, Inc.                           | \$ 10,000               | Heritage Days Celebration                               | 60,000                   | <b>15,000</b>     | 45,000               | 2.73%                       | 3.96              | 15,000                     | 100%                |
| Beaufort History Museum                     | \$ -                    | Beaufort on Stage & Screen                              | 20,000                   | <b>10,000</b>     | 10,000               | 1.82%                       | 3.90              | 7,500                      | 75%                 |
| Penn Center, Inc.                           |                         | Juneteen Celebration                                    | 30,500                   | <b>7,500</b>      | 20,000               | 1.36%                       | 3.44              | 5,000                      | 67%                 |
| Favour Corp.                                |                         | 843 Lowcountry Southern Blues Line Dance Festival       | 32,500                   | <b>12,500</b>     | 10,000               | 2.27%                       | NA                | -                          |                     |
|   | \$ 442,300              |   |                          | <b>\$ 549,574</b> | Total Requests       |                             |                   |                            |                     |
|   |                         |   |                          | <b>\$ 649,420</b> | FY2026 Budget        | 20000-5524                  |                   | \$ 616,074                 |                     |
|   |                         |   |                          | <b>\$ 99,846</b>  | (Over)/Under         |                             |                   | (33,346)                   |                     |

**FY26 Tourism Development Advisory Committee Recommendations**

October 8, 2025

Revenues:

|   |                |
|---|----------------|
| State Accommodation Tax                             | \$916,667.00   |
| Interest  | \$30,000.00    |
| Release of Committed Fund Balance- Capital Projects | \$468,639.00   |
| Release of Committed Fund Balance                   | \$224,363.00   |
| Totals  | \$1,639,669.00 |

Expenditures:

|   |                |
|---|----------------|
| Police Personal Support                     | \$25,729.00    |
| DMO State Mandated                          | \$267,500.00   |
| Affordable Housing Trust                    | \$32,230.00    |
| Downtown Twilight Hours Initiative          | \$95,000.00    |
| Police Ranger Utility Transport Vehicle     | \$18,567.00    |
| Police Mobile Command Trailer               | \$13,000.00    |
| Arsenal Walls Restoration Project Phase 1&2 | \$268,639.00   |
| Arsenal Windows Project                     | \$200,000.00   |
| Transfer to General Fund State Mandated     | \$69,583.00    |
| TDAC Grants Available                       | \$649,420.00   |
| Totals                                      | \$1,639,669.00 |

**Applicants and TDAC Recommendations**

Beaufort Film Society

TDAC recommends \$15,000 (Full Request)

Event takes place during a need time and last over 6 days to generate tourism activity. Data shows that this event provides a direct heads in beds and results in repetitive business throughout the year

SC Lowcountry & Resort Island Tourism

TDAC recommends \$72,800 (Full Request)

Organization provides year round marketing support for the Lowcountry and Beaufort in general.

Port Royal Sound Foundation

TDAC recommends \$5,250.00 (Full Request)

The center is a major attraction for the area and is constantly updating content around the campus. The foundation tells the story of our local flora and fauna.

Beaufort Water Search & Rescue

TDAC recommends \$17,500.00 (Full Request)

BWSR provided year-round support to visitors using our waterways

Freedman Arts District

TDAC Recommends \$20,000 (Partial Request)

3<sup>rd</sup> year for the event, committee believes this event will grow to have a great impact for heads in beds. Partial recommendation due to where other funds are coming from.

Beaufort Oyster Festival

TDAC recommends \$30,000 (Full Request)

Chet recused as he serves on the board.

Festival takes place during a very slow tourist season, event is growing every year and promotes local businesses

Friends of the Spanish Moss Trail

TDAC recommends \$12,100 (Full Request)

A growing attraction that needs to be showcased to visitors to the area

#### Habitat for Humanity

TDAC recommends \$6,424.00 (Full Request)

First time grant application for a 5k with proceeds going directly back into the community via Habitat for Humanity housing project.

#### Carolina Blight Sanctuary Wonders of Winter Birds

TDAC recommends \$8,500.00 (Full Request)

First time event showcasing the birds of the Lowcountry. Event is taking place during the winter months when demand is slow in the area.

#### Carolina Blight Sanctuary Osprey Pole

TDAC recommends \$4,000.00 (Full Request)

First time for infrastructure to construct a nest for our local osprey. Organization would like to make it into an educational experience tied to visitors coming to the PRSF Campus.

#### Friends of Hunting Island

TDAC recommends \$10,000 (Full Request)

In the prior years TDAC has recommended funds for the Fresnel Lens restoration. This funding would continue to support that and eventually creating an exhibit on hunting island for the actual lens.

#### The Original Gullah Festival

TDAC recommends \$50,000 (Full Request)

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.

#### Gullah Traveling Theater

TDAC recommends \$33,000 (Partial Request)

Festival takes place during a slow season; amount was reduced since funds cannot be used for prizes as presented to committee.

#### Pat Conroy Literary Center

TDAC recommends \$9,000 (Full Request)

First time grant application to market the center and Beaufort for one of our local writers. Pat Conroy has a following around the world and the center hopes to bring in heads in beds through its marketing campaign.

Penn Center Heritage Days  
TDAC recommends \$15,000 (Full Request)

The event takes place during a “need time” for the market. The Gullah heritage is a crucial part of Beaufort’s history and needs to be highlighted. The event draws repeat visitors to the area year over year.

Beaufort History Museum  
TDAC recommends \$7,500 (Partial Request)

Committee recommends in funding 50% of the marketing budget as presented.

Penn Center Juneteenth Celebration  
TDAC recommends \$5,000 (Partial Request)

The center is hosting this event for the 1<sup>st</sup> time, after discussion the committee came to a conclusion to recommend the marketing funds for the event.

Favour Corp.  
TDAC recommends no funding

TDAC did not score this event and does not recommend funding for this event as it will be taking place on Hilton Head Island and have no contribution to City of Beaufort Area.

Greater Beaufort- Port Royal CVB

Sales Plan  
TDAC recommends \$45,000 (Full Request)

Funds are used to attend trade shows to promote meetings, group tours and reunions to our market.

Northern Beaufort Area Sports Council

TDAC Recommends \$10,000 (Full Request)  
Funds are to be used for a facilities assessment and implementation study. Using this information the CVB will work to attract sporting events to the area.

Destination Marketing  
TDAC recommends \$240,000 (Increased Request from \$160,000)  
Since the DMO is the marketing organization for the City of Beaufort the committee felt like funding should increased for the DMO. Several reasons in the waterfront partial closure and no timeline as to when it will completely reopen the DMO can use extra funds to market to other areas where normally would not. The other reason is with 250<sup>th</sup> Anniversary coming up in 2026 for the American revolution, funding can be used to

market the area. The committee feels strongly about increasing the amount requested by the DMO.

TDAC Request

The Committee is requesting the remaining funds be placed into the special fund for FY27. The committee is looking into a tiered structure for matching funds going forward and will bring that to council when necessary.

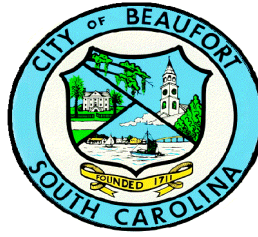
Respectfully Submitted

Chet Patel

Chair for TDAC Committee

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 24 | Applicant Presentations to TDAC, City Council Chambers                                   |
| September 30 | TDAC Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

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

**Favour Corp.**  
843 Lowcountry Southern Blues Line Dance Festival  
**Budget**

| <b>Revenue</b>                         | <b>Amount</b>             |
|--|---------------------------|
| Beaufort County                        | \$10,000                  |
| Vendors                                | \$1750                    |
| Admission Fees                         | \$32,000                  |
| Beverage Income                        | \$10,000                  |
|  |                           |
| <b>Total Revenue</b>                   | <b><u>\$53,750.00</u></b> |
|  |                           |
| <b>Expenses</b>                        | <b>Amount</b>             |
| Venues                                 | \$750                     |
| Marketing                              | \$5000                    |
| Artist & Entertainment                 | \$10,000                  |
| Royal Restroom                         | \$1500                    |
| Event Insurance                        | \$1500                    |
| Fence                                  | \$3500                    |
| Arm Officers/Security/Traffic Officers | \$3000                    |
| Production                             | \$5000                    |
| Chair and Table Rental                 | \$650                     |
| RV Dressing Room                       | \$1000                    |
| Postage                                | \$600                     |
| <b>Total Expenses</b>                  | <b><u>\$32,500</u></b>    |
|  |                           |
| <b>Deficit/Overage</b>                 | <b><u>\$21,250</u></b>    |

B. A defined budget for the 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. The funds will be used for the entertainment, dressing room, event insurance, fencing, venue rental, law enforcement, social media and radio marketing royal restroom, postage , table and chairs and sound and lighting.

C. A 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.

Favour will introduce to some and present to others the 843 Lowcountry Southern Blues Line Dance Festival on Saturday, October 18<sup>th</sup> in Hilton Head Island, SC. This festival event will attract line dancer from Mississippi, Georgia, North Carolina, Virginia, Florida, Tennessee and the upper part of the Carolina areas. Headling the festival is national recording artist Mr. 803 "Fresh Boots on the Ground" he has the number song in the country and has the social media going viral and straight out of Mississippi performing will be Jake Carter. The event is hosted by a national comedian as seen on Def Comedy Jam and more.

Line dancing is the trending right now, with a lot of new Southern Soul artist coming out of the upper part of Carolina? This event is surely to attract an estimated attendance of 800 participant. The executive director knows these numbers to be true, when she produces the 1st 912 Southern Blues Festival in Liberty County July of last year (Hinesville, GA). With 1200 ticket sold and 200 room block sold out with participant booking under 912 SBF and bringing in an additional \$480 in sales in food vendor permits. Andrea was able to track her demographics and her attendance from Eventbrite ticket sales, follow up surveys, radio and social media reporting. In addition, to her family entertainment event "The Big Top Circus" attracting at total of 5000 attendees (3 days 7 shows) to Chatham County (Savannah, GA).

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

The event is expected to benefit and impact the following industries of business: The hotels by putting heads in beds at our host hotels, Foodies eating out at our local bars and restaurants and for the shoppers, visiting our various shopping malls, outlets and mom and pops boutique stores, and lastly the gas station, as the tourist fill up at the local gas station for fuel upon the arrival in town and departure out of town. But overall the event will benefit Favour Corp. summer camps in partnership with a local community church utilizing there fellowship hall and outside property to produce various camp sessions. Our strategic plan this fall of 2026, is to pilot a weekend camp program for the working community here on the island since this has been an ongoing topic at the town council meeting during tourist season.

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.

Our expected impact on tourism and the tourism industry in the area served has an calculation of the following. The estimated number of of tourist to be attracted overnight by this project is 100. For we have reserved 100 hotel at the Hampton Inn with an additional on reserve.

Hotel cost per night is \$170.00 and \$36.00 estimated per person per day additional spending.

Hotel room nights estimated at 100

Tourism attendance 400

Total attendance 800 (festival goers, foodies, line dancer fun for all)

Economic Impact \$48,500

Tourism percentage on return based on estimated information indicated above is : .50 % (percent)

In conclusion, with our extensive marketing efforts ranging from radio, tv, email blast, direct mail, social media, print and press releases to various media houses we feel confident that we will reach and meet our goals to make an impressive impact as seen on CNN line dancing is taking the country by storm and we have the number artist in the country coming to perform to make our festival event a huge success.

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

The methodology that will used to measure the the effectiveness of the event in attracting tourist will be evaluated as listed. Electronic ticket sales sold on Eventbrite.com, surveys, website contact forms , hotel room block (under our event room block code).

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 23 | Applicant Presentations to TDAC  |
| September 30 | TDAC Meeting Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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:
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  - b. Events & Festivals – includes events and festivals of one day or longer that bring individuals from outside the Beaufort area.
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  - 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

**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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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: The "Chalk it Up!" Arts 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 and 2025 Fiscal years

List Accommodations Tax funding that has previously been awarded by 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 in the 2024 and 2025 Fiscal years

5. Dates you will begin and complete work on your event or project: Begin – Month/Year 01/26 End – Month/Year 04/26

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

6. Applicant Category (check all that apply)

on-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: \$ \$75,869.00

Accommodation Tax Funds Requested: \$ \$25,000

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? 6,000

11. All applicants must make 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, Island Packet, Savannah Morning News, Lowcountry WQeekly, and The Bluffton Sun. We will collaborate with CVB by working collectively on advertising for the event. We will also work with USCB to market to the student population. We will also work with Post&Couier.

**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 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 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.**

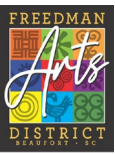
I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

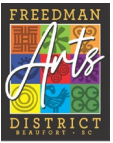
Signature Cherimie Crane Weatherford

Date \_\_\_\_\_

| <b>2025-2026 ATAX Revenue &amp; Expense Budget</b>        |                      |                           |
|---|----------------------|---------------------------|
| <b>Event/Project Projected Revenues</b>                   |                      |                           |
| Admissions Recipits                                       | \$ -                 |                           |
| Private Donations   | \$ 30,000.00         |                           |
| City of Beaufort ATAX Request                             | \$ 25,000.00         |                           |
| Beaufort Country ATAX Request                             | \$ 50,000.00         | Pending                   |
| Hilton Head ATAX Request                                  | \$ -                 |                           |
| Town of Bluffton ATAX Request                             | \$ -                 |                           |
| Other Area ATAX Request                                   | \$ -                 |                           |
| <b>TOTAL REVENUES:</b>                                    | <b>\$ 105,000.00</b> | <b>Pending</b>            |
| <b>Event/Project Projected Expenses</b>                   |                      |                           |
| Sales and Promotional Expenses                            | \$ 1,967.00          |                           |
| Publicity Materials Expense                               | \$ 1,517.00          |                           |
| Newspaper Advertizing                                     | \$ 5,197.00          |                           |
| Radio Expense   | \$ 3,000.00          |                           |
| Magazine Expense  | \$ 1,000.00          |                           |
| Television Expense  | \$ 8,000.00          |                           |
| Billboard Advertizing                                     | \$ -                 |                           |
| Printing  | \$ 2,213.00          |                           |
| Direct Mail Expenses                                      | \$ -                 |                           |
| Brochure Printing   | \$ 50.00             |                           |
| Flyer Printing  | \$ 250.00            |                           |
| Other Promotional Items                                   | \$ 1,750.00          |                           |
| Videography and Drone                                     | \$ 2,400.00          |                           |
| 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         |                           |
| <b>TOTAL PROJECTED EXPENSES:</b>                          | <b>\$ 75,869.00</b>  |                           |
| <b>PROJECTED PROFIT/LOSS</b>                              |                      |                           |
| PROJECTED LOSS (without County ATAX, with City ATAX)      | \$ (20,869.00)       |                           |
| PROJECTED LOSS (without City and County ATAX)             | \$ (45,869.00)       |                           |
| PROJECTED PROFIT SURPLUS (with both City and County ATAX) | \$ 29,131.00         | County ATAX Grant Expense |



# FREEDMAN ARTS DISTRICT 2026 CITY OF BEAUFORT ATAX GRANT APPLICATION



## Executive Summary:

The Freedman Arts District, a 501(c)(3) non-profit is requesting **\$25,000** 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 26th and all day activities on March 27th and 29th 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 2025 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.

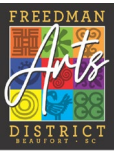
### A. "Chalk It Up!" Detailed Project Budget (see page 8)

#### Revenue:

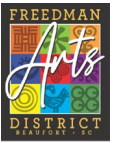
Revenue is generated exclusively from the sponsorship of chalk art squares. Approximately **\$30,000** may be raised through sponsorships or in-kind donations from local and regional businesses and institutions to cover operating expenses (including marketing and PR, and artist stipends) and to pay for promotional materials such as T-Shirts, Awards Ceremony Event and Final Artists Awards. With the an opening night celebration on Thursday the 26th we have added a third day to the festival to encourage longer hotel stays.

**TOTAL ESTIMATED REVENUE: \$30,000.00**

**TOTAL ESTIMATED EXPENSES: \$75,869.00**



# FREEDMAN ARTS DISTRICT 2026 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 27th -29th 2026. 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 2025 and build marketing expenditures in the weeks before the event. We are seeking **\$25,000** 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, WTOG
  - Total Cost: **\$3,000**

#### Print:

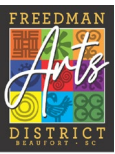
- 1. Print ads in Island Packet/Beaufort Gazette **\$1,247**
- 2. Ads in Courier & Post - HH, Charleston, Columbia **\$2,631**
- 3. Lowcounty Weekly/Island News **\$1,319**
- Total Print Costs: **\$5,197**

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.

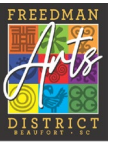
**Artist Installation:** We will have an artist create a piece in a prominent space in downtown Beaufort. In addition to the coverage and social media exposure of the process, the piece will be mounted on a movable display platform and relocated around the District and business corridors prior to the 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**
- 5. **Magazine Spotlight:** Work with local magazines for a story about Chalk it up!: \$1,000
- 6. **Videography And Drone:** Produce a short video and take drone photos of Chalk Art: \$2,400



# FREEDMAN ARTS DISTRICT 2026 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   |
| <b>Cost: \$3,350</b>  |         |

**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 |
| <b>Total Selected Start Up Material Costs: \$11,775</b>                    |         |

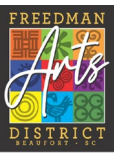
**Total Promotion, Marketing, and Start Up Material Costs: \$35,172**

**C. Brief Summary**

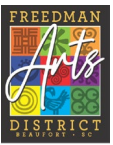
The Freedman Arts District’s, “Chalk it Up!” three-day Chalk Art Festival will host approximately 60 professional and amateur artists transforming a parking lot into colorful pavement museums. The festival will highlight local artists, attract regional and national chalk artists, and increase art tourism. 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 2025 and hosted a second "Artist Sunday" in December 2025. 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 the 1st successful Chalk Arts Festival in November 2001 held at the Beaufort Shopping Plaza on Boundary Street.



## FREEDMAN ARTS DISTRICT 2026 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 2025 through March 2026.

### **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.

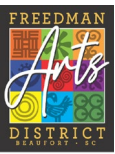
### **G. Cultural Impact on Beaufort**

This year's festival will include A Night With Jonathan Green, which will feature renowned lowcountry artist Jonathan Green and other prominent lowcountry artists. The event is expected to be highly attended. The festival will also provide support and awareness for the Freedman Arts- Arts and Crafts Cultural School, which will serve the low country population.

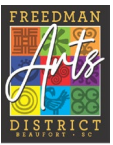
APPENDIX A

LOCATION OF THE FREEDMAN ARTS DISTRICT





# FREEDMAN ARTS DISTRICT 2026 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

**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

**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

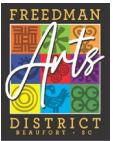
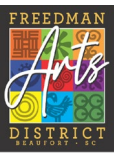
**Bonnie Hargrove** – Director of the USCB Center for the Arts

**Kelly Mitchell** – Volunteer Advocate

**Peggy Simmer** – Secretary of the Old Commons Neighborhood Association

### STAFF

**Cherimie Crane Weatherford**- Executive Director



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

| <b>TOTAL BUDGET AND REQUESTED GRANT BUDGET</b>              |                      |                           |   |
|---|----------------------|---------------------------|---|
| <b>Revenue</b>  | <b>Amount</b>        | <b>Grant Expense</b>      | <b>Notes</b>                              |
| Beaufort City ATAX  | \$ 25,000.00         | \$ 25,000.00              |   |
| Beaufort County ATAX  | \$ 50,000.00         | \$ -                      | Pending County ATAX Approval              |
| Projected Admissions  | \$ -                 | \$ -                      | Free Public Event                         |
| Private Donations   | \$ 30,000.00         | \$ -                      | (Cash or in kind)                         |
| <b>TOTAL REVENUES</b>                                       | <b>\$ 105,000.00</b> | <b>\$ 25,000.00</b>       |   |
| <b>EXPENSES</b>   | <b>Amount</b>        | <b>Grant Expense</b>      | <b>Notes</b>                              |
| Sales Promotion   | \$ 1,967.00          | \$ 1,967.00               |   |
| Publicity Materials   | \$ 1,517.00          | \$ 1,517.00               |   |
| Newspaper Advertising                                       | \$ 5,197.00          | \$ 5,197.00               | Post&Courier, Island Packet, etc.         |
| Radio Advertising   | \$ 3,000.00          | \$ 3,000.00               |   |
| Magazine Advertising  | \$ 1,000.00          | \$ 1,000.00               |   |
| Television Advertising                                      | \$ 8,000.00          | \$ 8,000.00               |   |
| Billboard Advertising                                       | \$ -                 | \$ -                      |   |
| Printing  | \$ 2,213.00          | \$ 2,213.00               |   |
| Direct Mail   | \$ -                 | \$ -                      |   |
| Brochure Printing   | \$ 50.00             | \$ 50.00                  |   |
| Flyer Printing  | \$ 250.00            | \$ 250.00                 |   |
| Other Promotional Items                                     | \$ 1,750.00          | \$ 1,750.00               |   |
| Postage Supplies  | \$ -                 | \$ -                      |   |
| Equipment Rental  | \$ 4,250.00          | \$ -                      | Tents, porta johns, chairs, tables, power |
| Service Rental  | \$ 815.00            | \$ -                      |   |
| Entertainment Fees  | \$ 1,500.00          | \$ 56.00                  | Muscians                                  |
| Speaker Fees  | \$ 28,000.00         | \$ -                      | Professional Chalk Artists                |
| Hospitality Fees  | \$ 2,000.00          | \$ -                      |   |
| Decorations   | \$ -                 | \$ -                      |   |
| Refreshments  | \$ 100.00            | \$ -                      |   |
| <b>Other Expenses</b>                                       |                      |                           |   |
| Artist Chalk  | \$ 900.00            | \$ -                      |   |
| Set up Supplies for Chalk art Sites                         | \$ 1,360.00          | \$ -                      |   |
| Awards Ceremony   | \$ 6,290.00          | \$ -                      |   |
| Permits   | \$ 50.00             | \$ -                      |   |
| Police/Security   | \$ 3,200.00          | \$ -                      |   |
| Videography/Drone   | \$ 2,400.00          | \$ -                      |   |
| <b>TOTAL EXPENSES</b>                                       | <b>\$ 75,809.00</b>  | <b>\$ 25,000.00</b>       |   |
| <b>PROJECTED LOSS/GAIN</b>                                  |                      |                           |   |
| PROJECTED PROFIT LOSS (without County ATAX, with City ATAX) | \$ (20,869.00)       |                           |   |
| PROJECTED PROFIT LOSS (with County, No City ATAX)           | \$ (4,191.00)        |                           |   |
| PROJECTED PROFIT LOSS (without City and County ATAX)        | \$ (45,809.00)       |                           |   |
| PROJECTED PROFIT SURPLUS (with both City and County ATAX)   | \$ 29,131.00         | County ATAX Grant Expense |   |

# Freedman Arts District, Inc

## Balance Sheet Standard

As of June 30, 2025

|                                       | Jun 30, '25         |
|---------------------------------------|---------------------|
| <b>ASSETS</b>                         |                     |
| Current Assets                        |                     |
| Checking/Savings                      | 84,902.33           |
| Other Current Assets                  | 1,067,651.67        |
| <b>Total Current Assets</b>           | <b>1,152,554.00</b> |
| Other Assets                          |                     |
| Revolving Loans Receivable (...)      | 428,195.32          |
| <b>Total Other Assets</b>             | <b>428,195.32</b>   |
| <b>TOTAL ASSETS</b>                   | <b>1580749.32</b>   |
| <b>LIABILITIES &amp; EQUITY</b>       |                     |
| Equity                                | 1,580,749.32        |
| <b>TOTAL LIABILITIES &amp; EQU...</b> | <b>1580749.32</b>   |

## Freedman Arts District, Inc

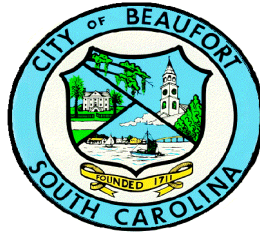
## Balance Sheet Standard

As of December 31, 2024

|                                       | Dec 31, '24         |
|---------------------------------------|---------------------|
| <b>ASSETS</b>                         |                     |
| Current Assets                        |                     |
| Checking/Savings                      | 37,609.62           |
| Accounts Receivable                   | 61,475.00           |
| Other Current Assets                  | 1,200,000.00        |
| <b>Total Current Assets</b>           | <b>1,299,084.62</b> |
| Other Assets                          |                     |
| Revolving Loans Receivable (...)      | 302,547.69          |
| <b>Total Other Assets</b>             | <b>302,547.69</b>   |
| <b>TOTAL ASSETS</b>                   | <b>1601632.31</b>   |
| <b>LIABILITIES &amp; EQUITY</b>       |                     |
| Liabilities                           |                     |
| Current Liabilities                   |                     |
| Accounts Payable                      | 2,113.96            |
| <b>Total Current Liabilities</b>      | <b>2,113.96</b>     |
| <b>Total Liabilities</b>              | <b>2,113.96</b>     |
| Equity                                | 1,599,518.35        |
| <b>TOTAL LIABILITIES &amp; EQU...</b> | <b>1601632.31</b>   |

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 23 | Applicant Presentations to TDAC  |
| September 30 | TDAC Meeting Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_ 

Date \_\_\_\_\_

## Fresnel Lens Budget 2023 - 2025/2026

| Project   | Vendor                             | Date    | Total                     | Payee            | Tax Grant/<br>City<br>\$10,500 | Tax<br>Grant/<br>County<br>\$30,000 | FOHI         | Total<br>Funding | Over/<br>Under<br>Budget |
|---|------------------------------------|---------|---------------------------|------------------|--------------------------------|-------------------------------------|--------------|------------------|--------------------------|
| <b>FUNDING</b>                                      |                                    |         |                           |                  | \$10,500.00                    | \$30,000.00                         | \$102,950.00 | \$143,450.00     |                          |
| <b>Crate build</b>                                  | FOHI                               | 10/23   | \$1500.00                 | FOHI             |                                |                                     | \$1500.00    |                  |                          |
| <b>Disassembly</b>                                  | Jim<br>Woodward/<br>team           | 10/23   |                           | SCPRT            |                                |                                     |              |                  |                          |
| <b>Storage Unit</b>                                 | Airport                            | Monthly | \$950.00                  | FOHI/<br>monthly |                                |                                     | \$950.00     |                  |                          |
| <b>Design/Frame</b>                                 | Artworks/Dan<br>Spinella           | 4/24    | \$2500.00                 | FOHI             | 2,500.00                       |                                     |              |                  |                          |
| <b>Fabrication</b>                                  | Pender<br>Brothers                 | 10/24   | \$23,500.00               | FOHI             | \$8,000.00                     | \$15,000.00                         | \$500.00     |                  |                          |
| <b>Site Clearing</b>                                | HISP                               | 4/25    | Paid                      | HISP             |                                |                                     |              |                  |                          |
| <b>Concrete Pad</b>                                 | HISP                               | 4/25    | Paid                      | HISP             |                                |                                     |              |                  |                          |
| <b>EXHIBIT SPACE</b>                                | Design -<br>Bennett<br>Engineering | 8/25    | Paid                      | FOHI             |                                | \$15,000.00                         | \$100,000.00 |                  |                          |
|   | Build - Huss<br>Construction       | Ongoing |                           |                  |                                |                                     |              |                  |                          |
| <b>***NEW 2026<br/>Fresnel Lens<br/>Enhancement</b> | Artworks/Dan<br>Spinella           | 2026    | 2026 Grant<br>Application | FOHI             | \$10,000.00                    | \$25,000.00                         |              |                  |                          |

|                                       | <u>Jan - Jul 25</u> |
|---------------------------------------|---------------------|
| Ordinary Income/Expense               |                     |
| Income                                |                     |
| 400 · DMV License Plate               | 9,534.12            |
| 405 · Pelican Plunge Income           | 2,555.00            |
| 410 · General Donations               | 55,581.74           |
| 417 · Memorial                        | 675.00              |
| 430 · Membership dues                 | 28,740.00           |
| 440 · Retail                          | 153.00              |
| 450 · Sea Turtle Conservation Project | 503.98              |
| 470 · Adopt A Turtle Nest             | 1,500.00            |
| 480 · Interest Income                 | 3,076.42            |
|                                       | <hr/>               |
| Total Income                          | 102,319.26          |
|                                       | <hr/>               |
| Gross Profit                          | 102,319.26          |
| Expense                               |                     |
| 600 · Admin                           |                     |
| 601 · Accounting Fee                  | 7,497.43            |
| 603 · Banking Fees                    | 409.68              |
| 604 · Executive Expense               | 586.37              |
| 605 · Insurance                       | 5,453.28            |
| 607 · Miscellaneous                   | 44.56               |
| 609 · Rental Unit                     | 1,050.00            |
| 616 · Charitable Donation             | 11,500.00           |
| 600 · Admin - Other                   | 1,233.58            |
|                                       | <hr/>               |
| Total 600 · Admin                     | 27,774.90           |
| 610 · Advertising/Printing            |                     |
| 615 · Membership-Advertising          | 500.00              |
|                                       | <hr/>               |
| Total 610 · Advertising/Printing      | 500.00              |
| 620 · Campgrounds                     | 1,033.16            |
| 630 · Marketing, Dev & Grant Writing  | 209.93              |
| 650 · Events                          |                     |
| 651 · Pelican Plunge                  | 620.00              |
|                                       | <hr/>               |
| Total 650 · Events                    | 620.00              |
| 660 · Lighthouse                      |                     |
| 663 · Lighthouse Lens Renovation Proj | 525.00              |
|                                       | <hr/>               |
| Total 660 · Lighthouse                | 525.00              |
| 670 · Membership                      |                     |
| 671 · Postage                         | 28.00               |
|                                       | <hr/>               |
| Total 670 · Membership                | 28.00               |

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|   | <u>Jan - Jul 25</u> |
|---|---------------------|
| 690 · Park Purchases                      |                     |
| 695 · Nature Center                       | 451.24              |
| 697 · HISP Equipment                      | 445.00              |
| 699 · Virtual Mobile Unit                 | 7,856.91            |
| 690 · Park Purchases - Other              | 4,000.00            |
|   | <hr/>               |
| Total 690 · Park Purchases                | 12,753.15           |
| <br>                                      |                     |
| 700 · Retail Expense                      | 229.27              |
| <br>                                      |                     |
| 710 · Sea Turtle Conserve Project         |                     |
| 711 · STCP                                | 2,138.27            |
| 712 · STPS                                | 10,000.00           |
| 713 · Caretta                             | 7.41                |
| 710 · Sea Turtle Conserve Project - Other | 3,198.34            |
|   | <hr/>               |
| Total 710 · Sea Turtle Conserve Project   | 15,344.02           |
| <br>                                      |                     |
| 740 · Website Social Media                | 42.10               |
| 750 · FOHI Book Project                   | (103.98)            |
| 751 · FOHI Lighthouse Book                | (722.86)            |
| 752 · Shorebirds Project                  | 378.86              |
| 756 · Watershed Unit- Environment         | 2,466.92            |
|   | <hr/>               |
| Total Expense                             | 61,078.47           |
| <br>                                      |                     |
| Net Ordinary Income                       | 41,240.79           |
|   | <hr/>               |
| Net Income                                | 41,240.79           |
|   | <hr/> <hr/>         |

|                                       | <u>Jan - Dec 24</u> |
|---------------------------------------|---------------------|
| Ordinary Income/Expense               |                     |
| Income                                |                     |
| 10231 · AMEX Cash reward              | 75.00               |
| 400 · DMV License Plate               | 9,558.22            |
| 405 · Pelican Plunge Income           | 2,800.00            |
| 410 · General Donations               | 34,220.99           |
| 415 · Sea Turtle Consvration Donation | 80,000.00           |
| 420 · Grants                          | 15,000.00           |
| 430 · Membership dues                 | 68,787.00           |
| 440 · Retail                          | 7,738.20            |
| 450 · Sea Turtle Conservation Project | 450.00              |
| 470 · Adopt A Turtle Nest             | 900.00              |
| 480 · Interest Income                 | 268.38              |
|                                       | <hr/>               |
| Total Income                          | 219,797.79          |
|                                       | <hr/>               |
| Gross Profit                          | 219,797.79          |
| Expense                               |                     |
| 600 · Admin                           |                     |
| 601 · Accounting Fee                  | 3,715.00            |
| 602 · Association Fees                | 85.60               |
| 603 · Banking Fees                    | 1,625.55            |
| 604 · Executive Expense               | 896.21              |
| 605 · Insurance                       | 3,968.11            |
| 606 · Office Supplies                 | 733.04              |
| 607 · Miscellaneous                   | 574.06              |
| 609 · Rental Unit                     | 1,620.00            |
| 600 · Admin - Other                   | 1,368.58            |
|                                       | <hr/>               |
| Total 600 · Admin                     | 14,586.15           |
| 610 · Advertising/Printing            |                     |
| 611 · Administrative                  | 113.49              |
| 615 · Membership-Advertising          | 51.95               |
| 617 · DMV License Plates              | 620.00              |
| 610 · Advertising/Printing - Other    | 375.00              |
|                                       | <hr/>               |
| Total 610 · Advertising/Printing      | 1,160.44            |
| 630 · Marketing, Dev & Grant Writing  | 299.90              |
| 645 · People's Park Project exp       | 71.00               |
| 650 · Events                          |                     |
| 651 · Pelican Plunge                  | 1,492.18            |
|                                       | <hr/>               |
| Total 650 · Events                    | 1,492.18            |
| 660 · Lighthouse                      |                     |
| 663 · Lighthouse Lens Renovation Proj | 11,550.00           |
|                                       | <hr/>               |
| Total 660 · Lighthouse                | 11,550.00           |

Friends Of Hunting Island  
Profit & Loss  
January through December 2024

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|   | <u>Jan - Dec 24</u> |
|---|---------------------|
| 670 · Membership                          |                     |
| 673 · Materials & Supplies                | 2,737.71            |
| 670 · Membership - Other                  | 152.17              |
|   | <hr/>               |
| Total 670 · Membership                    | 2,889.88            |
| 690 · Park Purchases                      |                     |
| 692 · General                             | 10,826.54           |
| 695 · Nature Center                       | 2,530.70            |
| 697 · HISP Equipment                      | 14,086.84           |
| 698 · Conservation Maintenance            | 2,143.19            |
|   | <hr/>               |
| Total 690 · Park Purchases                | 29,587.27           |
| 700 · Retail Expense                      | 10.65               |
| 705 · Nature Center Remodel               | 58.34               |
| 710 · Sea Turtle Conserve Project         |                     |
| 711 · STCP                                | 5,074.96            |
| 712 · STPS                                | 9,300.00            |
| 713 · Caretta                             | 21,624.94           |
| 714 · Drone                               | 7,080.25            |
| 710 · Sea Turtle Conserve Project - Other | 401.00              |
|   | <hr/>               |
| Total 710 · Sea Turtle Conserve Project   | 43,481.15           |
| 740 · Website Social Media                | 1,365.69            |
| 750 · FOHI Book Project                   | 0.00                |
| 751 · FOHI Lighthouse Book                | 2,359.50            |
| 752 · Shorebirds Project                  | 1,021.99            |
| 755 · Waterman Boot Project               | 141.11              |
| 756 · Watershed Unit- Environment         | 1,887.47            |
|   | <hr/>               |
| Total Expense                             | 111,962.72          |
|   | <hr/>               |
| Net Ordinary Income                       | 107,835.07          |
|   | <hr/>               |
| Net Income                                | <u>107,835.07</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: \_\_\_\_\_

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

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

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

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

4. Event or Project Name: Promoting the Spanish Moss Trail

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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature                     *Sissy Perryman*                    

Date \_\_\_\_\_



Friends of the

SPANISH MOSS TRAIL

2025-2026 City of Beaufort ATAX Grant Application Questions

Promoting the Spanish Moss Trail

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

*See template*

**B. A defined budget for the 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.”

**Budget Detail: \$60,500.00**

*Note: Long-time year-round Public Awareness/Journalism Professional hired by the Friends of the Spanish Moss Trail to Promote the Spanish Moss Trail on a regional and national level.*

**20% - City of Beaufort (pending)**

*20% - Friends of the Spanish Moss Trail private donations*

*60% - Beaufort County (pending)*

**Revenue:**

|   |                    |
|---|--------------------|
| Pending 2025-2026 City of Beaufort A-Tax Allocation   | \$12,100.00        |
| Friends of the Spanish Moss Trail 50/50 Funding Match | \$12,100.00        |
| Pending 2025-2026 Beaufort County A-Tax Allocation    | <u>\$36,300.00</u> |
| <b>TOTAL:</b>   | <b>\$60,500.00</b> |

**Expenses:**

|   |                    |
|---|--------------------|
| Program Budget: Public Awareness/Journalism | <u>\$60,500.00</u> |
| <b>TOTAL:</b>                               | <b>\$60,500.00</b> |

**TOTAL EXPENSES:** **\$60,500.00**

**C. A 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.**

Promoting the Spanish Moss Trail involves targeting, exposing and inspiring potential visitors to come to the City of Beaufort by seeking opportunities to place content in travel, lifestyle and outdoor recreation industry media outlets (both print and digital). We collaborate and leverage the best practices of the CVB, but our work on its own is curated daily to build synergy between the Spanish Moss Trail (free to the public) and other economy-building experiences (like other outdoor recreation, places to stay, shopping, museums and historic tours etc.). We pay special attention to the softer tourism months when the Trail really shines – as it is beautiful in the cooler, but mild months of the winter as well as the late summer months when families have the ability to travel.

**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.

Using our current industry relationships in the outdoor recreation travel industry and our network of media outlets, we will provide written and photography/videography content for them to place to promote the Spanish Moss Trail and the greater Beaufort area. In addition, we use funds to continuously update the official Spanish Moss Trail website and mobile app to reflect the most up-to-date visitor information, options for accommodations, and highlight other things to do when they come to the greater Beaufort area.

In addition to our work building a network in the travel industry, we carry out social media campaigns and work year-round to create, maintain and update content for the official Spanish Moss Trail website and free official Spanish Moss Trail Mobile App – that have a combined annual viewership of 50,000 – with more than 30% of them from outside a 50 mile radius. This is not an accident, but a professional campaign to cater to the needs of visitors before, during and after their visit. We also spend a great deal of time corresponding daily with prospective visitors as they email the official Spanish Moss Trail email (via our website/app) to navigate the details of their stay and the best way to enjoy Beaufort County. The official mobile app is a powerful visitor platform that has features that provide “Things to Know”, “Adventures Nearby” and “Places to Stay”. These features are dynamic, being updated regularly, and have proven to be an important way to create a fuller visiting 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.**

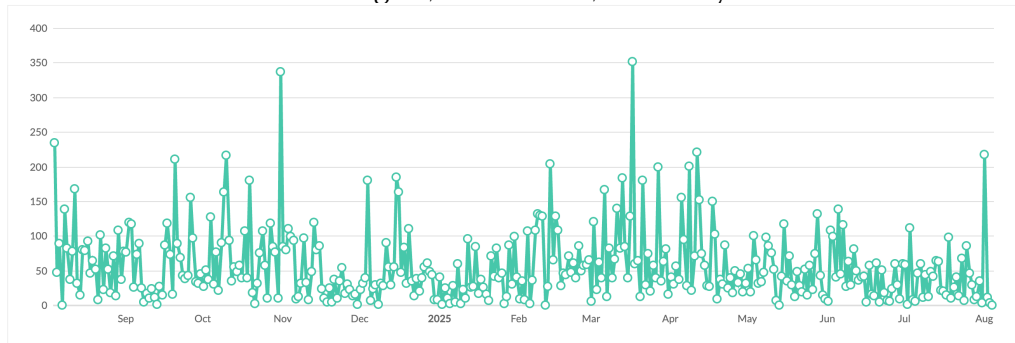
More than 100,000 people are enjoying the Trail each year (*numbers reflect a combination of official Mobile App data, CVB geo-fencing and past County counters*). The SC Lowcountry Tourism Commission (CVB/DMO) presented important data in August 2025 that nearly 25% of the Trail’s users are tourists staying overnight – with 78% traveling from outside South Carolina. In addition they say the Trail’s top markets are Greenville-Spartanburg-Asheville-Anderson, Columbia, and Charlotte – with markets like Savannah and Raleigh-Durham showing notable growth. Their broader tourism research consistently shows that visitors who engage in outdoor recreation like Trails tend to spend more money during their trip. This is because they often stay longer, purchase equipment rentals, and pair their experiences with dining, lodging, and cultural activities. Lastly, they note that outdoor recreation is a diverse spending group – spread across all age ranges and skewing toward higher household incomes.

The Spanish Moss Trail is a 10-mile rails-to-trail greenway owned by Beaufort County and primarily located and maintained within the City of Beaufort. The Trail has two new construction projects starting this fall – bringing the Trail into the Town of Port Royal and a connection into the historic downtown City of Beaufort dining, shopping, accommodations and waterfront area. 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.**

In addition to the CVB’s data, the Friends of the Spanish Moss Trail will continue to rely the official mobile app – The Spanish Moss Trail Mobile Guide – that 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 the official Mobile App between August 2024– August 2025:**

1. 14.3K+ individuals currently have our App downloaded (*increase from 2023-2024*)
2. More than 30% of App users live beyond a 50-mile radius of the City of Beaufort -Representing 382 cities across the United States
3. The Trail brings visitors to our area year-round but has visitor spikes the CVB’s specified softest months of August, November, February and March



**CITY OF BEAUFORT ATAX FINANCIAL REPORT**

*Friends of the Spanish Moss Trail - PROMOTING THE SPANISH MOSS TRAIL*

|   | <u>Previous Year: Submit with Application (applies to previous year award recipients)</u> | <u>Projected: Submit with Application</u> | <u>Actual: Submit with Final Report</u> |
|---|---|---|---|
| <b>Revenues</b>   |   |   |   |
| Admission Receipts  |   |   |   |
| Private Donations   |   | \$ 12,100.00                              |   |
| City of Beaufort ATAX Request   | \$13,000.00   | \$12,100.00                               |   |
| Beaufort County ATAX Request  |   | \$ 36,300.00                              |   |
| Hilton Head ATAX Request  |   |   |   |
| Town of Bluffton ATAX Request   |   |   |   |
| Other ATAX Requests   |   |   |   |
| Other Revenues (describe)   |   |   |   |
| <b>Total Revenues</b>   | <b>\$ 13,000.00</b>   | <b>\$ 60,500.00</b>                       | <b>\$ -</b>                             |
| <b>Projected Expenses</b>   |   |   |   |
| <b>Development of Project</b>   |   |   |   |
| Professional Program Budget: visitor public awareness responsiveness, media placements, social media content, official platforms content, photography, videography, and travel industry relationship building |   | \$60,500.00                               |   |
| <b>Total</b>  | <b>\$ -</b>   | <b>\$ 60,500.00</b>                       | <b>\$ -</b>                             |
| <b>Promotional Activities</b>   |   |   |   |
| Website   |   |   |   |
| Podcast   |   |   |   |
| Other (describe)  |   |   |   |
| <b>Total</b>  | <b>\$ -</b>   | <b>\$ -</b>                               | <b>\$ -</b>                             |

|                                | <b>Previous Year: Submit with Application (applies to previous year award recipients)</b> | <b>Projected: Submit with Application</b> | <b>Actual: Submit with Final Report</b> |
|--------------------------------|---|---|---|
| <b>Revenues</b>                |   |   |   |
| <b>Advertising</b>             |   |   |   |
| Print                          |   |   |   |
| Magazine                       |   |   |   |
| Radio                          |   |   |   |
| Television                     |   |   |   |
| Billboard                      |   |   |   |
| Other (describe)               |   |   |   |
| <b>Total</b>                   | <b>\$ -</b>   | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Other Eligible Expenses</b> |   |   |   |
| (describe)                     |   |   |   |
| (describe)                     |   |   |   |
| (describe)                     |   |   |   |
| (describe)                     |   |   |   |
| <b>Total</b>                   | <b>\$ -</b>   | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Total Expenses</b>          | <b>\$ -</b>   | <b>\$ 60,500.00</b>                       | <b>\$ -</b>                             |
| <b>Net profit/Loss</b>         | <b>\$ 13,000.00</b>   | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Award Amount</b>            |   |   |   |



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. (GTTI)
2. Mailing Address: 711 Bladen Street City Beaufort State SC Postal Code 29902
3. Project Director: Anita Singleton Prather
Project Treasurer or Administrative Official: Marie Tate, Bookkeeper
Telephone: 843-252-4642 Email: mtate@gttinc.org
4. Event or Project Name: Sea Island Christmas, Christmas Show, and Rice Cookoff

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

2023 - 2024 = \$35,000; 2024 - 2025 = \$30,000

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

HTAX 2023 = \$3,000 Harriet Tubman Celebration; HTAX 2025 = \$4,000 Sea Island Christmas

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

None other requested for Sea Island Christmas.

- 5. Dates you will begin and complete work on your event or project: Begin - Month/Year 8/2025 End - Month/Year 12/2026

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

6. Applicant Category (check all that apply)

- [checked] on-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: \$ 86,318

Accommodation Tax Funds Requested: \$ 36,000

Project Funding from Other Sources: \$ 55,000

9. Source of Applicant's Other Funds: Ticket sales, corporate and public support and sponsorships.

10. What is the anticipated total attendance for your event? 3,500

Total "tourist" anticipated? 42%

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

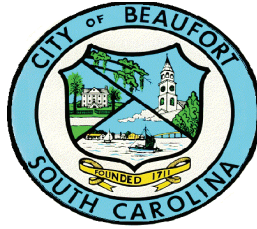
Please see attachment.

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**12. Provide the information below as an attachment to your application: (Please see attached.)**

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



CITY OF BEAUFORT

TOURISM DEVELOPMENT ADVISORY COMMITTEE

Gullah Traveling Theater, Inc.

## Attachment

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

GTTI works with the City's DMO to coordinate its marketing and advertising efforts. We consult with them regarding media outlets, advertising packages and pricing, and coordinating with them and other organizations to maximize impact of spending dollars. Further, we work in coordination with other nonprofits and businesses to reciprocally promote other activities happening during the same period or to draw tourists and visitors back to Beaufort for future visits.

12. Provide the information below as an attachment to your application: (Please see below.)


- 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 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 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.**

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". GTTI attended the mandatory City of Beaufort ATAX Workshop on August 15, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name Anita Singleton Prather, Executive Director

Signature 

Date August 26, 2025

**12. A. Detailed Project Budget**  
2025/2026 Sea Island Christmas

| <b>Line Item</b>                                | <b>Amount</b>   |
|---|-----------------|
| <b>Income</b>                                   |                 |
| Ticket Sales                                    | \$35,000        |
| Corporate Sponsorships                          | \$15,000        |
| Public Support                                  | \$5,000         |
| City of Beaufort ATAX Request                   | \$36,000        |
| <b>Total Income</b>                             | <b>\$91,000</b> |
| <b>Expenses</b>                                 |                 |
| Performers Fees                                 | \$15,000        |
| Sales Commissions                               | \$5,000         |
| Printing & Promotions                           | \$2,500         |
| Digital & Media Advertising                     | \$25,000        |
| Radio Advertising                               | \$1,500         |
| Magazine & Print Advertising                    | \$2,500         |
| Equipment Rental                                | \$1,500         |
| Event Expenses & Supplies                       | \$1,500         |
| Service Fees – Audio-Visual Technicians         | \$750           |
| Decorations & Costumes                          | \$500           |
| Hospitality Expenses                            | \$700           |
| Venue (USCB)                                    | \$7,000         |
| Insurance                                       | \$500           |
| Kid’s Cookoff                                   | \$3,000         |
| Cookoff Prizes                                  | \$5,000         |
| Audio-Visual Expenses                           | \$3,500         |
| Administrative & Indirect Costs (15% of direct) | \$10,868        |
| <b>Total Expenses</b>                           | <b>\$86,318</b> |
| <b>Projected Net Revenues Over Expenses</b>     | <b>\$ 4,682</b> |

**12.B. Defined Project Budget**  
2025/2026 Sea Island Christmas

|                                      |                 |
|--------------------------------------|-----------------|
| <b>City of Beaufort ATAX Request</b> | <b>\$36,000</b> |
|                                      |                 |
| <b>Expenses</b>                      |                 |
| Printing & Promotions                | \$2,500         |
| Digital & Media Advertising          | \$25,000        |
| Radio Advertising                    | \$1,500         |
| Magazine & Print Advertising         | \$2,500         |
| Equipment Rental                     | \$1,500         |
| New Event – Kid’s Cookoff            | \$3,000         |
| <b>Total Expenses</b>                | <b>\$36,000</b> |
|                                      |                 |
|                                      |                 |

**12. C. Summary Description**

**Sea Island Christmas Celebration**, presented by Gullah Traveling Theater, is a four-day cultural holiday experience at Waterfront Park. Signature events include *Christmas Wish...Freedom*, a powerful full-stage musical; a cultural symposium exploring Gullah history and sustainability; the deliciously exciting **Gullah Taste of Christmas & Rice Cookoff** with free rice tastings; and the festive **Christmas Marketplace** featuring local vendors, food, and entertainment. New in 2025, a **Children’s Rice Cookoff** for ages 7–17, inspiring the next generation of Lowcountry culinary talent. The event also welcomes renowned **Lowcountry Chef BJ Dennis**, host and lead judge, ensuring authenticity, excitement, and an unforgettable holiday experience.

**12.D. Organizational Alignment and Municipal Benefit**

The Sea Island Christmas Celebration directly aligns with GTTI’s mission to preserve and share the history, traditions, and culture of the Gullah Geechee people through theater, cultural programming, and community engagement. As a holiday event uniquely rooted in the Sea Islands, it draws significant tourism while also enriching local pride and awareness. According to Beaufort’s DMO, 77% of attendees in 2024 came from out of state, with top visitor markets including Jacksonville, FL; Charleston, SC; Atlanta, GA; and Washington, DC. Overall, 40–52% of attendees consistently qualify as tourists, ensuring both cultural and economic benefits for the City of Beaufort.

Tourists attracted to the event extend their stay in the area, directly benefiting accommodations, restaurants, retail shops, tour operators, and other small businesses in the City of Beaufort. Industry data shows that an overnight visitor to Beaufort spends an average of **\$175–\$200 per day**, while day-trip visitors spend an average of **\$70–\$90 per day** on dining, shopping, and activities. With more than 2,000 attendees in 2024—nearly half of whom were tourists—the event likely generated an estimated **\$175,000–\$225,000 in direct visitor spending**, not including multiplier effects.

Because the Celebration takes place during the non-peak holiday season, it provides a much-needed boost to the hospitality industry while supporting the City’s efforts to position Beaufort as a year-round cultural destination. By generating overnight stays, increased dining, and shopping activity, the event not only strengthens local tourism-related businesses but also enhances Beaufort’s reputation as the heart of Gullah Geechee heritage and holiday traditions.

### 12.E. Impact on Tourism

The Sea Island Christmas Celebration has a direct and measurable impact on tourism in Beaufort. In 2024, the event drew more than 2,000 attendees, of which 40–52% qualified as tourists (traveling from more than 50 miles away). According to Beaufort’s DMO, 77% of those tourists were from out of state, with top visitor markets including Jacksonville, FL; Charleston, SC; Atlanta, GA; and Washington, DC.

Industry data confirms that overnight visitors to Beaufort spend an average of \$175–\$200 per day, while day-trip visitors spend \$70–\$90 per day. Based on these averages, the 2024 Celebration generated an estimated \$175,000–\$225,000 in direct visitor spending in hotels, restaurants, shops, and attractions.

Given that nearly half of the attendees consistently qualify as tourists, we can reasonably substantiate that 50% of all event expenditures are tourism-related. This includes advertising, marketing, promotions, and event logistics that directly target and serve visitors. By taking place in the non-peak holiday season, the event provides vital support to Beaufort’s hospitality and tourism industry, creating overnight stays, increasing restaurant and retail traffic, and reinforcing the City’s reputation as a cultural and holiday destination.

In 2024, GTTI received **\$30,000 in ATAX support**, which we estimate resulted in **\$175,000–\$225,000 in direct visitor spending**. This represents a **return on investment (ROI) of 5.8x to 7.5x**, meaning every **\$1 of ATAX funding generated \$5.80–\$7.50 in direct spending** in the City of Beaufort.

### 12. F. Event Evaluation

The effectiveness of the Sea Island Christmas Celebration in attracting and serving tourists will be evaluated through multiple methods. We will continue to utilize **data analytics from Beaufort’s Destination Marketing Organization (DMO)**, which tracks visitor origin, market reach, and percentage of tourists attending. In addition, **GTTI collects zip codes for all ticket and marketplace digital purchases**, allowing us to document the number of attendees traveling more than 50 miles as well as the percentage of out-of-state visitors. Post-event will continue to support our efforts to respond to our marketplace ensuring clear accountability and measurable outcomes for the City of Beaufort.

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 23 | Applicant Presentations to TDAC  |
| September 30 | TDAC Meeting Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.

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

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

| <b>Expenses</b>     | Total Cost   | ATAX expenditures                   |
|---------------------|--------------|-------------------------------------|
| Shirts              | \$ 8,959.16  | \$ 3,314.89 (at 37% of total costs) |
| Print Marketing     | \$ 616.52    | \$ 228.11 (at 37% of total costs)   |
| photographer        | \$ 350.00    | \$ 129.50 (at 37% of total costs)   |
| Grounded Running    | \$ 1,600.00  | \$ 592.00 (at 37% of total costs)   |
| Credit Card fees    | \$ 158.00    | \$ 58.46 (at 37% of total costs)    |
| Other News          | \$ 516.32    | \$ 191.04 (at 37% of total costs)   |
| Sherrif             | \$ 3,000.00  | \$ 1,110.00 (at 37% of total costs) |
| <br>                |              |                                     |
| Chamber of Commerce | \$ 800.00    | \$ 800.00 (at 100% of total costs)  |
| <br>                |              |                                     |
| Total Expenses      | \$ 16,000.00 | \$ 6,424.00                         |

| <b>Income</b>         |              |
|-----------------------|--------------|
| Runners               | \$ 25,000.00 |
| Sponsors              | \$ 5,000.00  |
| City of Beaufort ATAX | \$ 6,424.00  |
| <br>                  |              |
| Total Income          | \$ 36,424.00 |
| <br>                  |              |
| Net Profit            | \$ 20,424.00 |

A.-B.: The total expenses for the 2026 Turkey Trot will be estimated to be \$16,000. For the categories shirts, printing, photographer, operation fees, credit card fees, other marketing, and Sheriff/police we multiplied the expense by 37% as that is the average number of out of state runners who are participating in the event as runners. For the category Marketing through the Chamber of Commerce we are asking ATAX to cover the entire expense. This brings total expenses to \$16,000 and total ATAX expenses to \$6,424. Total Income including projected ATAX funding equals \$36,424. This means the event will net \$20,424. All funds raised by the Turkey Trot are restricted and go directly towards building an affordable home in Beaufort.

C. The Habitat for Humanity Turkey Trot is one of the most fun runs of the year. Starting along the waterfront in Beaufort, it crosses the bridge to Lady's Island, and then turns around to end where it began. We are currently just over 1,000 runners from the 2024 race. Hopefully that number will be 1,200 or greater by the 2026 race.

D. All funds raised by the Turkey Trot are restricted to go directly towards building an affordably home in Beaufort for a Qualifying family.

E. In 2024, 37% of runners were from out of state.

F. All runners are required to register which includes state and zipcode information.



October 1, 2025

Dear City of Beaufort ATAX Committee,

Following up on our September 24, 2025, presentation, we wanted to provide clarification regarding the \$3,000 allocation for the new Children’s Rice Cookoff event. During the meeting, there was discussion about whether this amount might be disqualified since it was to be supported through the award funds.

We respectfully request that these funds remain in consideration for funding, as they will be used for specifically designated advertising this new attraction and exclusive promotion of the Rice Cookoff. Promotion will include Facebook, network television, and other digital platforms to ensure strong visibility and community engagement.

Attached is a copy of our new Facebook advertisement for the event, which we plan to launch shortly. Below is a breakdown of our projected usage of the requested funds.

Thank you for your continued support of initiatives that highlight Beaufort’s unique cultural heritage and expand the reach of our community events. We are grateful for your partnership in helping us share these experiences with residents and visitors alike.

|          |         |
|----------|---------|
| Facebook | \$1,500 |
| WJCL     | \$1,500 |
| Total    | \$3,000 |

Thank you for any attention you can give to this matter.

With appreciation,

Executive & Creative Director

SEA ISLAND  
**GULLAH**  
**CHRISTMAS**  
CELEBRATION

*A Taste of Gullah  
Rice Cookoff &  
\*\*NEW\*\*  
Da' Chillin' Rice Cookoff*

**SATURDAY, DECEMBER 6, 2025**

9AM - NOON: Livestream Cookoff

*REGISTER ■ COOK ■ WIN!*

1-3PM: Public Tasting & People's Choice Voting

Henry C. Chambers Waterfront Park, Historic Beaufort

*TASTE ■ VOTE ■ CELEBRATE!*

**FEATURING:**

**Da' Chillin'**

**Rice Cookoff Prizes**

(17 + Younger)

**\$500 - 1<sup>st</sup> Place, Grand Prize**

\$300 - 2<sup>nd</sup> Place

\$200 - 3<sup>rd</sup> Place

\$100 - People's Choice

**Registration Fee = \$40pp**



**Victoria A. Smalls,**  
Cultural & Land  
Preservationist,  
Livestream Host

Lowcountry  
Celebrity Chef BJ Dennis,  
Lead Judge & Host



**Adults**

**Rice Cookoff Prizes**

(18 + Older)

**\$3,000 - 1<sup>st</sup> Place, Grand Prize**

\$2,000 - 2<sup>nd</sup> Place

\$1,000 - 3<sup>rd</sup> Place

\$500 - People's Choice

**Registration Fee = \$85**

**LAST DAY FOR RICE COOKOFF PARTICIPANTS TO REGISTER**

**SUNDAY, NOVEMBER 30, 2025, MIDNIGHT!**

*Early Bird Discounts until October 31, 2025*

**DISCOVER**  
*South Carolina*



VISIT  
**BEAUFORT**  
PORT ROYAL SEA ISLANDS

[www.gullahkinfolktravelingtheater.org/christmas](http://www.gullahkinfolktravelingtheater.org/christmas)

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.

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

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature  \_\_\_\_\_

Date \_\_\_\_\_

## City of Beaufort – ATAX Funding Request

### Project: Beaufort County Sports & Cultural Facilities Assessment and Implementation Study

#### Event or Project Name

Beaufort County Sports & Cultural Facilities Assessment and Implementation Study

#### Project Description (100 words max for executive summary)

This study will provide a comprehensive assessment of Beaufort County's existing sports, recreation, and cultural event facilities, and evaluate the implementation of future investments. The project will analyze current inventory, stakeholder needs, peer venues, market demand, and economic impact potential. Requested by the Beaufort Area Sports Council in coordination with the CVB, the resulting recommendations will guide the City of Beaufort and regional partners in attracting more tournaments, cultural programming, and visitor-driven events. The study will directly support increased overnight visitation and spending, strengthening Beaufort's role as a premier destination for sports, arts, and cultural tourism.

#### Relation to Organization's Purpose & Beneficiaries

The Beaufort Area Sports Council, in partnership with the CVB, works to attract sporting events, tournaments, and related activities that grow tourism and economic impact in Beaufort County. This project directly supports that mission by creating a long-term plan for sports and cultural facilities that will serve residents and visitors alike. Beneficiaries include:

- Tourists: expanded opportunities for sports tournaments, cultural festivals, and events.
- Local economy: increased overnight stays, dining, and retail spending.
- Community stakeholders: stronger infrastructure for schools, clubs, and organizations.
- City and County governments: improved ability to plan, fund, and maintain facilities that drive tourism revenue.

#### Expected Impact on Tourism & Tourism Industry

The study will quantify potential increases in visitation, room nights, and spending generated by future facility improvements. By aligning Beaufort's sports and cultural assets with regional demand, the study positions the City to host multi-day tournaments, regional competitions, and cultural events that attract out-of-town visitors. Expected impacts include:

- Identification of new sports tourism opportunities, building on the growth of youth and amateur sports travel.
- Strengthened ability to retain and grow festivals and cultural events.
- A detailed economic impact analysis projecting visitor spending in lodging, food & beverage, retail, and attractions.
- Long-term increase in ATAX and hospitality tax revenues from expanded event-driven tourism.

#### Evaluation & Measurement

Effectiveness will be evaluated by:

- Completion of a final report with clear recommendations and financial models.

- Quantitative projections of attendance, overnight visitors, and tourism spending.
- Use of established methodologies (IMPLAN economic impact modeling, peer venue analysis, and market demand projections).
- Post-study, metrics such as number of events booked, visitor counts, and hotel room nights will be tracked annually by the Beaufort Area Sports Council and CVB to measure ROI on recommended investments.

### Coordination & Collaboration

This project will be conducted in collaboration with:

- Beaufort Area Sports Council (lead applicant) & Visit Beaufort, Port Royal & Sea Islands (CVB)
- City of Beaufort & Beaufort County governments
- School District & Parks & Recreation organizations
- Sports clubs and associations (baseball, softball, soccer, etc.)
- Cultural organizations (USCB Center for the Arts, Beaufort History Museum, Pat Conroy Literary Center, etc.)
- Hospitality partners (hotels, restaurants, and retail stakeholders)

The findings will integrate into the City's broader tourism planning, aligning with Visit Beaufort's marketing sub-brands of Events & Festivals, History & Culture, and Outdoor Recreation.

### Fiscal Stability & Budget

Total Project Cost: \$50,000

ATAX Funds Requested: \$10,000

Matching Funds (Beaufort Area Sports Council, Visit Beaufort, Beaufort County, partners): \$40,000

Budget Breakdown:

- Economic Impact Analysis (IMPLAN modeling): \$25,000
  - Resource Data collection: \$25,000
- Total: UP to \$50,000

The Beaufort Area Sports Council and CVB have successfully managed prior ATAX grants, maintaining compliance, timely reporting, and matching funds.

### Timeline

Project Start: January 2026

Project Completion: June 2026

Milestones: (Projected)

- Week 1–2: Project kickoff, data request, stakeholder engagement
- Week 3–6: Market, facility, and peer venue analysis
- Week 7–9: Program recommendations, interim presentation
- Week 10–12: Economic impact modeling, draft report
- Final: Presentation of findings to City of Beaufort, TDAC, and partners

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: Pat Conroy Literary Center
2. Mailing Address: 601 Bladen Street City Beaufort State SC Postal Code 29902
3. Project Director: Bruce Murdy, Director of Development
Project Treasurer or Administrative Official: Jonathan Haupt, Executive Director
Telephone: 843-224-3524 Email: bruce@patconroyliterarycenter.org
4. Event or Project Name: Digital Marketing Support

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 by 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 1/26 End - Month/Year 12/26

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

6. Applicant Category (check all that apply)

- on-profit organization registered with the Secretary of South Carolina
[checked] 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): 81-1865914

8. Total Estimated Costs of the Proposed Event or Project: \$ 18,000

Accommodation Tax Funds Requested: \$ 18,000

Project Funding from Other Sources: \$ 0

9. Source of Applicant's Other Funds: Regular budget of Conroy Center

10. What is the anticipated total attendance for your event? 4,000 (2024 data)

Total "tourist" anticipated? 1,555+

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

We will work closely with Rob Wells and the Visit Beaufort SC DMO

**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 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 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.

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

I Bruce D. Murdy have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on 8/15/2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name Bruce D. Murdy

Signature 

Date 8/27/25

12. C. A 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 Conroy Center is TripAdvisor's #1 attraction in Beaufort, drawing visitors from over 40 states. We are an established tourism magnet, dedicated to cultivating a passionate reading and writing community in honor of Pat Conroy. With outside promotion not done before, we know we can improve our economic and community impact. We will use ATAX funds to target tourism prospects in Atlanta, Greenville and Charlotte through digital media including paid search, display ads and social media ads. We will work closely with the Discover Beaufort DMO to drive visitation during off/shoulder seasons, increasing attendance and overnight stays in Beaufort.

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

In existence for nearly 10 years, The Pat Conroy Literary Center is a 501(c)(3) non-profit, fits in the DMO sub-brand of 'Arts'. We have a board of 13 and a staff of 2. The board meets bi-monthly and sets policy and long-term goals at an annual Board (and staff) retreat. The Conroy Center, which charges no admission fees and depends primarily on donations, grants and event fees to support the annual \$388,000 annual operating budget has a healthy bank balance to finance the project until we receive reimbursement for expenses incurred.

The Conroy Center attracted over 4,000 visitors in 2024, and we are pacing ahead of that for 2025. According to our data, over 38% of our 2024 visitors stayed overnight. Through July 2025, over 40% of visitors to the Conroy Center stayed overnight. We do this without any out-market tourism promotion other than our social media outlets (Facebook, Instagram and our newsletter). We believe this ATAX request relates directly to our organizational goals.

Based on the percentage of overnight visitors that come to the Conroy Center, we believe that out-market tourism promotion through digital advertising will not only increase the visitation numbers to the Center, but *directly* impact overnight visitors stays at our hotels, B&Bs, etc.

In addition, those visitors will eat at local restaurants, shop at our retailers and visit other attractions. Increased visitation numbers also help the Conroy Center, as we know that those who visit us often donate on-site, give recurring gifts and share their good experiences with friends back home.

The campaign we envision is a 12-month campaign budgeted at an average of \$1,500/month for digital advertising- paid search, display ads, and social media ads. We will seasonally adjust, with heavier marketing during the off-season and to coincide with DMO marketing initiatives.

12 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 proposed digital media campaign targets highly desirable tourists to the Conroy Center and Beaufort with the following demographics:

**Demographics:**

- Adults 35–75+
- Highly educated, with interest in literature, writing, history, and culture
- Mix of regional drive-market visitors, and Conroy fans nationwide

**Psychographics:**

- Passion for reading, especially Southern literature
- Interest in cultural events and small-group learning experiences
- Seeks authentic, meaningful experiences when traveling

*100% of the requested funds will directly impact tourism and the tourism industry in Beaufort.*

For example, if the 1,555 visitors to the Conroy Center in 2024 who identified themselves as ‘overnight guests’ stay an average of 1.5 nights, that is 2,332 room nights. At an average rate of \$150, that equates to \$349,875 in accommodations revenue-not including the additional ancillary spend at shops, restaurants, other attractions, etc.

We estimate this funding may elevate our out-market overnight guests by approximately 10% as a result of this funding. If so, that would be an additional roughly 155 additional visitors to the Conroy Center from 50+ miles away, 232 additional room nights in Beaufort (1.5 night average stay), and at an average \$150/night, **an additional \$34,800 in**

**accommodations revenue (not including ancillary spending at shops, restaurants, other attractions, etc.)**

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

We have an established system in place to measure visitation and overnight stays combining personal interaction/connection and modern digitally based record keeping through Constant Contact. The database is regularly updated by our docent volunteers with visitor contact information, overnight stays, etc. This system has been in place for several years and works well. We will use the same system to measure the impact of our visitor numbers and be able to report back with confidence.

**CITY OF BEAUFORT ATAX FINANCIAL REPORT**

[organization name]

|  | <b>Previous Year: Submit with Application (applies to previous year award recipients)</b> | <b>Projected: Submit with Application</b>                  | <b>Actual: Submit with Final Report</b> |
|--|---|--|---|
| <b>Revenues</b>                            |   |  |   |
| Admission Receipts                         |   | \$0  |   |
| Private Donations                          |   | \$0  |   |
| City of Beaufort ATAX Request              |   | \$18,000   |   |
| Beaufort County ATAX Request               |   | \$0  |   |
| Hilton Head ATAX Request                   |   | \$0  |   |
| Town of Bluffton ATAX Request              |   | \$0  |   |
| Other ATAX Requests                        |   | \$0  |   |
| Other Revenues (describe)                  |   | we don't charge admission, but we may get 'donations' from |   |
| <b>Total Revenues</b>                      | <b>\$ -</b>   | <b>\$ 18,000.00</b>  | <b>\$ -</b>                             |
| <b>Projected Expenses</b>                  |   |  |   |
| <b>Development of Event or Project</b>     | <b>\$ -</b>   | <b>\$0</b>   |   |
| (describe)                                 |   |  |   |
| (describe)                                 |   |  |   |
| (describe)                                 |   |  |   |
| (describe)                                 |   |  |   |
| <b>Total</b>                               | <b>\$ -</b>   | <b>\$ -</b>  | <b>\$ -</b>                             |
| <b>Promotional Activities</b>              |   |  |   |
| Website                                    |   |  |   |
| Podcast                                    |   |  |   |
| Other:                                     |   |  |   |
|  | \$ -  | \$ -   | \$ -                                    |
| <b>Advertising</b>                         |   |  |   |
| Print                                      |   |  |   |
| Magazine                                   |   |  |   |
| Radio                                      |   |  |   |
| Television                                 |   |  |   |
| Billboard                                  |   |  |   |
| Digital- radio search, display ads, social |   |  |   |
| Media Ads                                  |   | \$18,000   |   |
| <b>Total</b>                               | <b>\$ -</b>   | <b>\$ 18,000.00</b>  | <b>\$ -</b>                             |
| <b>Other Eligible Expenses</b>             |   |  |   |
| (describe)                                 |   |  |   |
| (describe)                                 |   |  |   |
| (describe)                                 |   |  |   |
| (describe)                                 |   |  |   |
| <b>Total</b>                               | <b>\$ -</b>   | <b>\$ -</b>  | <b>\$ -</b>                             |
| <b>Total Expenses</b>                      | <b>\$ -</b>   | <b>\$18,000</b>  | <b>\$ -</b>                             |
| <b>Net profit/Loss</b>                     | <b>\$ -</b>   | <b>\$0</b>   | <b>\$ -</b>                             |
| <b>Award Amount</b>                        |   |  |   |

# 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 by 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 make a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration: **Please see attachment.**

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

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

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C. A 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.**

I Robert L. Adams have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". A Penn Center representative attended the mandatory City of Beaufort ATAX Workshop on August 15, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name Robert L. Adams

Signature Robert L. Adams

Date August 27, 2025

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



CITY OF BEAUFORT

TOURISM DEVELOPMENT ADVISORY COMMITTEE

Penn Center, Inc.

## Attachment - Heritage Days

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

The Penn Center will collaborate closely with the City's Destination Marketing Organization (DMO), whose territory includes the Sea Islands of St. Helena. Utilizing their market analysis, we are identifying key audiences that have historically attended our events and use this data to inform our marketing strategy for 2025 and beyond. Heritage Days is a true community effort: we engage local leaders, cultural groups, and stakeholders in planning event activities and shaping the agenda. Collectively, we promote the festival to attract both local residents and visitors. This annual celebration is a staple for St. Helena's diaspora, highlighting the cultural contributions of the Sea Islands and drawing repeat attendees from near and far.

12. Provide the information below as an attachment to your application: (Please see below.)

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

B. A **defined budget for the 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. (Please see below.)

C. A **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.

Penn Center's **Annual Heritage Days Celebration** happens the second weekend of November and honors the Gullah Geechee cultural legacy of St. Helena Island and Penn Center's National Historic Landmark District. This three-day festival celebrates history, arts, and community through educational programs, music, dance, crafts, and cuisine. Highlights include Youth and Family Day, Cultural Reconnection featuring museum tours, a symposium, Motown-inspired fish fry, and a Community Celebration with a Heritage Parade, step shows, and marketplace. Heritage Days invites visitors to experience and celebrate the resilience, creativity, and traditions of the Gullah Geechee people in a vibrant, immersive homecoming event.

D. **Describe how the proposed event or project relates to the organization's purposes** and identify who is \_\_\_\_\_

**expected to benefit.**

The Penn Center’s Heritage Days Celebration directly advances the organization’s mission to promote and preserve Penn’s history and culture through education, community engagement, and social justice. By showcasing Gullah Geechee traditions, arts, music, and historical narratives, the event serves as both a cultural and educational platform, fostering awareness, pride, and understanding of the Sea Islands’ heritage. Attendees—including local residents, students, educators, diaspora communities, and visitors from across the region—benefit from immersive learning experiences, cultural enrichment, and opportunities for community connection. Heritage Days also significantly impacts tourism by attracting hundreds of visitors to St. Helena Island and the City of Beaufort, generating overnight stays, restaurant and retail activity, and repeat visitation. This event aligns with Penn Center’s vision to be a resource for positive change, critical thinking, and social consciousness, while sustaining its legacy as a champion of human dignity.

**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 expected impact on tourism is both cultural and economic. While Penn Center is a National Historic Landmark and one of the oldest educational institutions in the country, public awareness of its significance remains limited. By raising Penn’s visibility and profile, the Heritage Days Celebration enhances the Beaufort area’s tourism offerings by adding cultural depth to a visit that often centers on beaches and fishing. This event showcases the Gullah Geechee story as a vital chapter in the building of our nation and its ongoing quest for equality.

Heritage Days draws thousands of attendees annually, including overnight visitors, who contribute directly to hotel occupancy, restaurant dining, and retail spending in Beaufort County. Importantly, the event takes place during the shoulder season—an ideal time for visitors to find affordable travel deals, enjoy warm seasonal weather, and experience less crowded hotels and attractions. Tourism-related expenditures—such as marketing, hospitality, lodging, and food services—can be substantiated as directly tied to visitor and tourist activity. By attracting repeat visitation and new audiences, the event strengthens the local tourism industry while elevating St. Helena Island as a destination of cultural and historical importance

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

The effectiveness of the Heritage Days Celebration in attracting and serving tourists will be evaluated using multiple methods. We will work closely with the City’s Destination Marketing Organization (DMO) and utilize their market analysis to assess visitor trends, geographic reach, and spending patterns. In addition, Penn Center will collect attendee surveys, track digital sales, and gather participant zip codes to better understand the percentage of out-of-town visitors and overnight guests. This data will allow us to measure the event’s direct tourism impact and identify areas for growth. Feedback from local hospitality partners and vendors will also help us evaluate visitor satisfaction and improve the overall tourist experience for future events.

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.**

I Robert L. Adams have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and “Grant Review Criteria”. A Penn Center representative attended the mandatory City of Beaufort ATAX Workshop on August 15, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025- 2026 Accommodations Tax Funds.

Printed Name Robert L. Adams, Executive Director

Signature Robert L. Adams

Date August 27, 2025

**12. A. Detailed Project Budget**

2025/2026 Heritage Days

| <b>Line Item</b>  | <b>Amount</b>   |
|---|-----------------|
| <b>Income</b>   |                 |
| Event Sales   | \$15,000        |
| Corporate Sponsorships                                  | \$10,000        |
| Public Support  | \$5,000         |
| City of Beaufort ATAX Request                           | \$18,500        |
| Beaufort County ATAX Request                            | \$15,000        |
| <b>Total Income</b>                                     | <b>\$63,500</b> |
| <b>Expenses</b>   |                 |
| Digital & Media Advertising                             | \$5,000         |
| Television Advertising                                  | \$15,000        |
| Radio Advertising                                       | \$1,500         |
| Magazine & Print Advertising                            | \$2,000         |
| Publicity Materials Expenses                            | \$3,500         |
| Equipment Rental  | \$3,500         |
| Event Expenses & Supplies                               | \$1,500         |
| Postage, Printing & Direct Mail Expenses                | \$5,000         |
| Entertainment Fees                                      | \$5,000         |
| Hospitality Expenses                                    | \$15,000        |
| Promotional Items                                       | \$3,000         |
| <b>Total Expenses</b>                                   | <b>\$60,000</b> |
| <b>Projected Net Revenues Over Expenses<sup>1</sup></b> | <b>\$ 3,500</b> |

<sup>1</sup> Does not include 15% indirect cost factor.

**12.B. Defined Project Budget**

2025/2026 Heritage Days

|                                      |                 |
|--------------------------------------|-----------------|
| <b>City of Beaufort ATAX Request</b> | <b>\$18,500</b> |
|                                      |                 |
| <b>Expenses</b>                      |                 |
| Printing & Promotional Items         | \$5,000         |
| Digital & Media Advertising          | \$5,000         |
| Radio Advertising                    | \$1,500         |
| Publicity Materials Expenses         | \$3,500         |
| Equipment Rental                     | \$3,500         |
| <b>Total Expenses</b>                | <b>\$18,500</b> |
|                                      |                 |

# 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: P.O. Box 126 City St. Helena Island State SC Postal Code 29920
3. Project Director: Robert L. Adams
4. Project Treasurer or Administrative Official: Richard Kenyon, Financial Manager/Denise Bullitt, Grant Writer  
Telephone : 843-593-0904 Email: sankofainspirit@gmail.com
5. Event or Project Name: 2026 Juneteenth Celebration

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

No funds have been requested or awarded for this event.

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

No funds have been requested or awarded for this event.

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

No funds have been requested or awarded for this event.

6. Dates you will begin and complete work on your event or project: Begin – Month/Year 1/2026 End – Month/Year 7/2026

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

7. 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

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

9. Total Estimated Costs of the Proposed Event or Project: \$ 25,000

Accommodation Tax Funds Requested: \$ 7,500

Project Funding from Other Sources: \$ 20,000

10. Source of Applicant's Other Funds: Vendor & merchandise sales, corporate & public support, sponsorships..

11. What is the anticipated total attendance for your event? 500

Total "tourist" anticipated? 33%

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

13. **Provide the information below as an attachment to your application; Please see attachment.**

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 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 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.**

I Robert L. Adams have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". A Penn Center representative attended the mandatory City of Beaufort ATAX Workshop on August 15, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

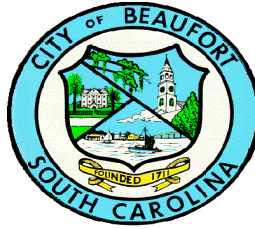
Printed Name Robert L. Adams

Signature *Robert L. Adams*

Date August 27, 2025

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



CITY OF BEAUFORT

TOURISM DEVELOPMENT ADVISORY COMMITTEE

Penn Center, Inc. - Juneteenth

## Attachment

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

The Penn Center will collaborate closely with the City's Destination Marketing Organization (DMO), whose territory includes the Sea Islands of St. Helena. Utilizing their market analysis, we are identifying key audiences that have historically attended our events and use this data to inform our marketing strategy for 2025 and beyond. Heritage Days is a true community effort: we engage local leaders, cultural groups, and stakeholders in planning event activities and shaping the agenda. Collectively, we promote the festival to attract both local residents and visitors. This annual celebration is a staple for St. Helena's diaspora, highlighting the cultural contributions of the Sea Islands and drawing repeat attendees from near and far.

12. Provide the information below as an attachment to your application: (Please see below.)

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

B. A **defined budget for the 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. (Please see below.)

C. A **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 Historic Penn Center on St. Helena Island, a National Historic Landmark, invites the community and visitors to its annual **Juneteenth Celebration**. Honoring freedom, resilience, and community, this growing event combines history, culture, and family fun in a setting rich with heritage and natural beauty. Guests can explore Penn's historic campus, enjoy music, arts, and crafts, and learn traditional skills such as basket weaving and woodworking. With wide open spaces for children, proximity to beaches, and historic Beaufort nearby, the celebration is ideal for both day trips and weekend getaways, offering an inspiring, family-friendly experience of freedom and culture.

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

The Penn Center's Juneteenth Celebration directly supports the organization's mission to promote and preserve history and culture through education, community development, and social justice. Juneteenth commemorates freedom, resilience, and unity—values deeply connected to Penn Center's legacy as one of the first institutions for African American education. By hosting this event on the grounds of a National Historic Landmark, Penn provides a meaningful setting for reflection, celebration, and cultural expression.

Those who benefit include local residents, families, students, and visitors from across the Lowcountry and beyond who gain access to a free, educational, and culturally rich experience. The event fosters intergenerational learning, where elders share traditions and history with younger generations, ensuring the continuity of cultural knowledge. It also supports local artists, tradition bearers, and vendors while contributing to the tourism economy by drawing day-trippers and overnight guests to St. Helena Island and Beaufort County

- 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 Juneteenth Celebration is a newer addition to Penn Center's cultural offerings and has, to date, primarily attracted local participation. Beginning in 2026, Penn Center will expand its marketing regionally to grow the event into a recognized tourism attraction. Our strategy includes targeted digital advertising, radio, and newspaper placements in key drive-in markets, supplemented by bonus coverage through news features. We will also promote the celebration at South Carolina Welcome Centers and rest stops, drawing in travelers seeking unique cultural experiences along their routes.

The event is designed to attract both day-trip visitors and short-stay tourists, encouraging overnight stays in Beaufort County through proximity to beaches, historic Beaufort, and the Penn Center's National Historic Landmark District. Marketing, hospitality, and visitor services expenditures are directly tied to tourism, and we anticipate measurable increases in hotel occupancy, restaurant sales, and retail activity. By expanding beyond a primarily local audience, Juneteenth at Penn Center will add cultural depth to the area's peak-season tourism economy.

- F. **Describe how the effectiveness of the event or project in attracting or providing for tourists will be evaluated.**

The effectiveness of the Juneteenth Celebration in attracting and serving tourists will be evaluated through both data collection and community feedback. Penn Center will collaborate with the City's Destination Marketing Organization (DMO) to review market analysis and measure visitor reach. We will collect attendee surveys, track ticket reservations for free activities, and gather zip code data to distinguish local attendees from regional and out-of-town visitors.

In addition, feedback from vendors, hospitality partners, and local businesses will provide insight into spending patterns, overnight stays, and visitor satisfaction. This evaluation will allow Penn Center to substantiate the percentage of tourism-related expenditures and guide strategies for future growth of the event as a regional tourism attraction.

**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.**

I Robert L. Adams have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". A Penn Center representative attended the mandatory City of Beaufort ATAX Workshop on August 15, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025- 2026 Accommodations Tax Funds.

Printed Name Robert L. Adams, Executive Director

Signature Robert L. Adams

Date August 27, 2025

**12. A. Detailed Project Budget**

2025/2026 Juneteenth

| Line Item   | Amount          |
|---|-----------------|
| <b>Income</b>   |                 |
| Event Sales, Parking Fees                               | \$10,000        |
| Corporate Sponsorships                                  | \$3,000         |
| Public Support  | \$1,500         |
| City of Beaufort ATAX Request                           | \$7,500         |
| Beaufort County ATAX Request                            | \$8,500         |
| <b>Total Income</b>                                     | <b>\$30,500</b> |
| <b>Expenses</b>   |                 |
| Digital & Media Advertising                             | \$10,000        |
| Radio Advertising                                       | \$1,500         |
| Magazine & Print Advertising                            | \$1,500         |
| Publicity Materials Expenses                            | \$3,500         |
| Equipment Rental  | \$2,500         |
| Event Expenses & Supplies                               | \$1,500         |
| Entertainment Fees                                      | \$3,500         |
| Hospitality Expenses                                    | \$5,000         |
| Promotional Items                                       | \$1,500         |
| <b>Total Expenses</b>                                   | <b>\$30,500</b> |
|   |                 |
| <b>Projected Net Revenues Over Expenses<sup>1</sup></b> | <b>\$ 0</b>     |
|   |                 |

<sup>1</sup> Does not include 15% indirect cost factor.

**12.B. Defined Project Budget**

2025/2026 Juneteenth

|                                      |                |
|--------------------------------------|----------------|
| <b>City of Beaufort ATAX Request</b> | <b>\$7,500</b> |
|                                      |                |
| <b>Expenses</b>                      |                |
| Digital & Media Advertising          | \$5,000        |
| Equipment Rental                     | \$2,500        |
| <b>Total Expenses</b>                | <b>\$7,500</b> |
|                                      |                |

**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:** Port Royal Sound Foundation

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

**3. Project Director:** Kat Armstrong, Special Projects Coordinator

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

**Telephone #:** 843-645-7774 **Email:** karmstrong@portroyalsoundfoundation.org

**4. Event or Project Name:** Interactive Garden Art Exhibit for PRSF Maritime Center

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

No City of Beaufort ATAX funds have been awarded for this specific project.

**List Accommodations Tax funding that has previously been awarded by the City of Beaufort for other events**

Previous City of Beaufort ATAX funds for other projects, events, and exhibits include: FY25- \$9,500 (School of Fish Exhibit- to be completed in 2025); FY24- \$6,650 (Reptile Displays); FY23- \$6,100 (Shark Exhibit); FY22- \$3,750 (Outdoor Dock Exhibits); FY21- \$3,700 (Animals of the Port Royal Sound); FY20- \$2,500 (History Timeline); FY19- \$7,114 (Main Gallery Map); FY17- \$6,100 ("SEA LIFE, ENRICH" Marketing Campaign); FY16- \$3,750 ("More to Sea" Marketing Campaign)

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

No other ATAX funds have been awarded for this specific project, but PRSF has received support from Beaufort County ATAX funds for other projects, as outlined below. We also anticipate seeking funds for different projects through Beaufort County's upcoming FY26 2% State ATAX and 3% ATAX/HTAX cycles.

Beaufort County 2% State ATAX: FY25- \$37,000 and \$52,510; FY24- \$20,000; FY23- \$91,000; FY22- \$52,380; FY21- \$50,250; FY20- \$26,500; FY19- \$8,300; FY17- \$10,000; FY16- \$3,750

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

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

**Begin** – January 2026 (when funding is received) **End** – December 2026 (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:** \$ 10,500

Accommodation Tax Funds Requested: \$ 5,250

Project Funding from Other Sources: \$ 5,250

**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. A portion of our funding also comes from grants. Expenses for this project will be covered by operational funds until grant reimbursement is received. Operational funds will also cover the remaining \$5,250 needed to complete the exhibit.

**10. What is the anticipated total attendance for your event?** Over 29,000 per year

**Total "tourist" anticipated?** 49% = 14,210 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 variety 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 using social media (Meta i.e. Facebook, Instagram) and Google (Google Display Ads, YouTube). We work with consultants at 1111Marcom to manage our Search Engine Optimization (SEO) tools and maximize our digital reach. The Beaufort-Port Royal Convention and Visitors Bureau (CVB) provided us with data on their top Visitor Market Areas, which allowed us to focus on priority geographic areas in conjunction with their marketing efforts as a Designated Marketing Organization (DMO).

Our newest video series, "[A Sound Future Starts Here.](#)" launched in spring 2025 thanks to the support of Beaufort County ATAX funds. These videos highlight the variety of ways people interact with the Port Royal Sound—from fishing to citizen science and more—with more videos set to launch later this year. As a component of that grant, and in partnership the Beaufort-Port Royal CVB, PRSF also sent two representatives to the Student and Youth Travel Association (SYTA) conference in Savannah August 22-25. While there, PRSF connected with tour operators planning trips for students all over the country and shared about the rich ecology, diverse wildlife, and exciting recreation opportunities available in our area, with the goal of attracting groups to come learn from everything Beaufort has to offer.

On our website's [Visit Us page](#), we have a link directing people to the Beaufort-Port Royal CVB to learn more about our area and accommodations. For the local market, we partner with publications like Beaufort Lifestyle, Local Life, Island News, and the Beaufort County Military and Veterans Resource Guide, as well as sharing our rack cards (in English and Spanish) with visitor 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 spreadsheet. We have also attached our progress report and 75% reimbursement request for our previous 2024-25 City ATAX grant for the School of Fish exhibit which was submitted in May 2025, to supplement the information in the 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.**

All ATAX funds will be used to contract with an exhibit designer(s) for the design, production, and installation of the Interactive Garden Art Exhibit. PRSF has and continues to receive proposals and price quotes from different artists for these displays.

**C. A summary description of 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 Port Royal Sound Foundation (PRSF) requests \$5,250 to design and install an Interactive Garden Art Exhibit in the Maritime Center gardens. The Maritime Center is a free museum and aquarium that serves as a key tourist destination for visitors to Beaufort. These outdoor installations of colorful, larger-than-life animal statues will contribute to the immersive and interactive experience our visitors enjoy, while also highlighting native species and elevating our pollinator gardens. The regular addition of new exhibits and experiences to our campus is critical to enhance the experience of everyone visiting and to attract first-time and returning guests to Beaufort.

**D. Describe how the proposed event or 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 255,000 visitors. We are on track to host **over 29,000 visitors in 2025 alone**. The Maritime Center acts as a welcome center for the Port Royal Sound, introducing visitors from all over the world to the unique ecology, rich history, vibrant culture, and exciting recreation of our area. Guests of all ages enjoy our live animals, interactive exhibits, extensive artifact collections, and beautiful art displays. PRSF recognizes the importance of constantly refreshing, expanding, and enhancing our museum offerings to ensure visitors have the best experience possible whether it is their first visit or their hundredth.

New outdoor exhibits funded through this grant would include **colorful, larger-than-life animal statues and interactive art displays**—sparking curiosity in children, providing photo ops for tourists, and pairing perfectly with educational signage about our native plants and local wildlife. Examples of the inspiration

for these statues are attached to this application. PRSF is excited to **expand opportunities for learning and exploration beyond the walls of the Maritime Center** and facilitate a memorable experience for visitors before they even step in the door. These whimsical displays will draw people in and set the tone for the immersive experience they will enjoy once inside the Maritime Center, thanks to life-size animal models and eye-catching exhibits on every wall and ceiling of the museum, including the School of Fish exhibit soon to be installed thanks to a previous City ATAX grant. These new garden displays will also contribute to a **multi-year effort to beautify and expand the usable footprint of the entire PRSF campus.**

PRSF's campus has changed a lot in the past several years. The construction of our 10,000-square-foot, open-air Educational Pavilion in 2023 and the addition of large-scale, aesthetic signage has increased our visibility for those driving by. This expansion provided the **perfect opportunity to reimagine our outdoor exhibit offerings on a greater scale.** We spent lots of time considering how to increase the usable footprint of our campus for programs and events, and how to make the best first impression on every guest that visits. As a result, we have put significant effort into beautifying our native plant and pollinator gardens, which reach from the Maritime Center to beyond the Pavilion and have already received lots of positive feedback from guests. Thanks to a generous grant from the Junior Service League of Beaufort, we added signage for all the species in the garden to educate visitors about our diverse array of native plants. A grant through Beaufort County's 2024 2% ATAX cycle allowed us to build a greenhouse, which will be able to grow plants year-round and support the constant addition of more plants to our gardens. We are excited about how the installation of animal statues throughout the garden will support these efforts to **elevate our outdoor spaces and make them just as inviting and exciting as inside our museum.**

PRSF is proud to be a key tourist destination in Beaufort, and we take this role seriously. We know 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/](https://BeaufortSC.org/About-Us/Economic-Impact/)). 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 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.**

**Since opening in 2014, PRSF has welcomed over 255,000 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. In fact, **July 2025 was the second busiest month on record** for the Maritime Center, welcoming 2,580 guests-- not including program participants. Since 2020, the percentage of visitors that travel to us from beyond 50-miles has been at or above 49%. Our method for 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. Our expansive work aligns with the Tourism Development and Advisory

Committee's goals of attracting visitors to Beaufort and enriching their experience, as well as supporting the DMO's tourism priorities of outdoor recreation, the arts, and events/festivals. Elevating our outdoor presence through the installation of oversized art displays in our garden will complement and enhance all of these offerings. Maritime Center visitors will be encouraged to spend more time exploring our entire campus, rather than just inside the museum, which is especially beneficial as a family-oriented destination offering more space for children to play. People will also be excited to attend and host events in this unique event venue. An investment from City of Beaufort ATAX funds in this project will not only provide more to do and enjoy, but also help us sustain a vibrant, fresh, and inviting tourist destination to reach new visitors who appreciate and want to learn more about the unique environment and culture that our Lowcountry community has to offer.

Our continued commitment to impactful digital marketing in 2026 will allow us to reach more tourists and encourage them to visit our area to enjoy all we have to offer. So far in 2025, we have had 475,932 impressions on Google and 413,424 impressions on Meta, for a combined total of 889,356. We are pacing to reach roughly 3,000,000 impressions once our campaigns finish, which is more than double from our previous campaign years. Our highest reached Designated Marketing Areas (DMAs) include Atlanta, Charlotte, Raleigh, Greenville, Jacksonville, Columbia, and Augusta. All of these locations coincide with the Beaufort-Port Royal CVB's top Visitor Market Areas.

**F. Describe how the effectiveness of the event or project in attracting or providing for 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 in October 2024, we updated to a digital sign-in process that allowed us to collect this information more efficiently and accurately to analyze our demographics and reach. After the first few months of this new digital process, we realized we were getting a slightly lower number of visitor sign-ins than we had historically. With this recognition, we adapted our system and began offering both digital and hard-copy sign-in options. This adjustment has increased our responses back to the expected numbers by flexibly accommodating all visitors and their sign-in preferences. Our sign-in process also allows volunteers at the front desk the opportunity to greet visitors personally and make a positive first impression as soon as they walk in. 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.

*Animals depicted in the Interactive Garden Art Exhibit will represent native species and complement what guests are learning about in the Maritime Center. Here are some examples of our vision:*

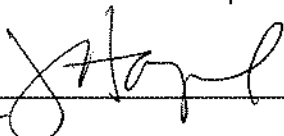


SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

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

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". I attended the mandatory City of Beaufort ATAX Workshop on 8/15/25 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025- 2026 Accommodations Tax Funds.

Printed Name: Jody Hayward

Signature: 

Date: 8/29/25

**CITY OF BEAUFORT ATAX FINANCIAL REPORT**

*Port Royal Sound Foundation*

|   | <i>PRSF's School of Fish exhibit is ongoing and set to be complete before the end of 2025. As such, the expenses included below are based on our original quote from 3D Topics and subject to change. We have applied for and received the first 75% of our allotted City ATAX funding for this project (see attached report).</i> |   |   |
|---|--|---|---|
|   | <b>Previous Year:</b> Submit with Application<br>(applies to previous year award recipients)   | <b>Projected:</b> Submit with Application | <b>Actual:</b> Submit with Final Report |
| <b>Revenues</b>   |  |   |   |
| Admission Receipts  |  |   |   |
| Private Donations   | \$ 4,000.00  | \$ 5,250.00                               |   |
| City of Beaufort ATAX Request   | \$ 9,500.00  | \$ 5,250.00                               |   |
| Beaufort County ATAX Request  |  |   |   |
| Hilton Head ATAX Request  |  |   |   |
| Town of Bluffton ATAX Request   |  |   |   |
| Other ATAX Requests   |  |   |   |
| Other Revenues (describe)   |  |   |   |
| <b>Total Revenues</b>   | <b>\$ 13,500.00</b>  | <b>\$ 10,500.00</b>                       | <b>\$ -</b>                             |
| <b>Projected Expenses</b>   |  |   |   |
| <b>Development of Event or Project</b>                                  |  |   |   |
| Contract with 3D Topics to design, produce, and install exhibit         | \$ 13,500.00   |   |   |
| Contract with exhibit designers to design, produce and install exhibits |  | \$ 10,500.00                              |   |
| (describe)  |  |   |   |
| (describe)  |  |   |   |
| <b>Total</b>  | <b>\$ 13,500.00</b>  | <b>\$ 10,500.00</b>                       | <b>\$ -</b>                             |
| <b>Promotional Activities</b>   |  |   |   |
| Website   |  |   |   |
| Podcast   |  |   |   |
| Other (describe)  |  |   |   |
| <b>Total</b>  | <b>\$ -</b>  | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Advertising</b>  |  |   |   |
| Print   |  |   |   |
| Magazine  |  |   |   |
| Radio   |  |   |   |
| Television  |  |   |   |
| Billboard   |  |   |   |
| Other (describe)  |  |   |   |
| <b>Total</b>  | <b>\$ -</b>  | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Other Eligible Expenses</b>  |  |   |   |
| (describe)  |  |   |   |
| (describe)  |  |   |   |
| (describe)  |  |   |   |

| Revenues<br>(describe) | <u>Previous Year: Submit with Application</u><br>(applies to previous year award recipients) | <u>Projected: Submit with Application</u> | <u>Actual: Submit with Final Report</u> |
|------------------------|--|---|---|
|                        |  |   |   |
| <b>Total</b>           | \$ -   | \$ -                                      | \$ -                                    |
| <b>Total Expenses</b>  | \$ 13,500.00   | \$ 10,500.00                              | \$ -                                    |
| <b>Net profit/Loss</b> | \$ -   | \$ -                                      | \$ -                                    |
| <b>Award Amount</b>    | \$ 9,500.00  |   |   |

**ACCOMMODATIONS TAX APPLICATION**  
**FISCAL YEAR 2025/2026**

**CITY OF BEAUFORT**



*South Carolina*  
**LOWCOUNTRY**  
**AND RESORT ISLANDS**  
-----  
[SouthCarolinaLowcountry.com](http://SouthCarolinaLowcountry.com)

**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](mailto: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 2024/2025 \$61,800**  
**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:

| <b>State ATAX</b>         | <b>6% Request</b> | <b>Approved</b> |
|---------------------------|-------------------|-----------------|
| <b>Beaufort County</b>    | <b>\$82,900</b>   | <b>TBD</b>      |
| <b>Bluffton</b>           | <b>\$66,700</b>   | <b>TBD</b>      |
| <b>Hilton Head Island</b> | <b>\$127,900</b>  | <b>TBD</b>      |
| <b>Edisto Beach</b>       | <b>\$47,900</b>   | <b>TBD</b>      |
| <b>Walterboro</b>         | <b>\$20,500</b>   | <b>TBD</b>      |
| <b>Jasper County</b>      | <b>\$13,000</b>   | <b>\$13,000</b> |
| <b>Hardeeville</b>        | <b>\$15,800</b>   | <b>TBD</b>      |

**We also applied 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, 2025 to June 30, 2026**
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: **\$901,500**  
Accommodation Tax Requested: **\$72,800 (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 2024/2025, we were in direct contact with 57,966 guests and visitors who have requested our printed materials: 35,640 Guidebooks distributed + 13,050 Attractions Brochures distributed + 9,276 Guests at the Visitors Center. This is a 16% increase in this number set from last year. The increase was primarily seen in the distribution of our Guidebook particularly from a Woobox campaign we did through Facebook. Foot traffic was down significantly (27.8%).**

**Our online presence touched 545,388 digital viewers (at least once): 412,502 Web sessions down 19.6% from the previous year) + 72,334 vetted and active Constant Contact email recipients (up 6.6% from the previous year) + 53,836 Facebook likes (up 17.5% from the previous year) + 1,615 Twitter followers (flat compared to the previous year) + 5,101 Instagram followers (up 26.2% from the previous year). This is 14.1% down from last year with growth in our social outlets but a significant decrease in web sessions. This is primarily due to the disruption in the Google Analytics zero click model. This has been a challenge for the tourism industry as well as for several other industries. The artificial intelligence being used by Google will serve up the answer to queries by scraping data from websites and giving the user answers without sending them to the website that has the answers, thus creating a "Zero Click" experience for the user.**

**Our online presence numbers do 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.**

**57,966 + 545,388 = 603,354. This is 11.9% 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 in the last five years have averaged an increase of 29% and we knew that would be extremely hard to maintain. We continue to invest \$50,000 in marketing dollars in research to better market our region for the future. Our goal for this year will be to increase attendance by using the Symphony dashboard and our 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 2025/2065.**

**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 has served 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 2025-  
2026

|                          |            |            |            |
|--------------------------|------------|------------|------------|
| <b>Income</b>            |            |            |            |
| Gift Shop                |            |            |            |
| Retail Sales             | 50,000.00  |            |            |
|                          |            |            |            |
| Total Gift Shop Income   | 50,000.00  | 50,000.00  | 50,000.00  |
| Tourism Commission       |            |            |            |
| Bank Interest            | 10,000.00  |            |            |
| Local ATAX               | 179,000.00 |            |            |
| Local HTAX               | 15,000.00  |            |            |
| State Appropriation      | 400,000.00 |            |            |
| State ATAX               | 200,000.00 |            |            |
| TAG 24-25                | 45,000.00  |            |            |
|                          |            |            |            |
| Total Tourism Comm       | 849,000.00 | 849,000.00 | 849,000.00 |
| Visitors Center & Museum |            |            |            |
| Donations                | 2,500.00   |            |            |
|                          |            |            |            |
| Total VC & M             | 2,500.00   | 2,500.00   | 2,500.00   |

**TOTAL INCOME****901,500.00**\*\*See Note  
Below**Expense****Gift Shop**

|                        |                  |                  |
|------------------------|------------------|------------------|
| Consignments           | 2,000.00         |                  |
| Credit Card Charges    | 1,600.00         |                  |
| Misc                   | 1,500.00         |                  |
| Retail Merchandise     | 24,000.00        |                  |
| <b>Total Gift Shop</b> | <b>29,100.00</b> | <b>29,100.00</b> |

**Tourism Commission**

## Direct Marketing

|                                |            |
|--------------------------------|------------|
| Billboards                     | 43,000.00  |
| Conversion Study               | 2,500.00   |
| Creative/Content<br>Generation | 10,000.00  |
| Digital Advertising            | 276,000.00 |
| E_Newsletters                  | 13,500.00  |
| FAM Trips                      | 12,000.00  |
| Inquiry Postage                | 20,000.00  |
| Print Advertising              | 50,000.00  |
| Printed Materials              | 25,000.00  |
| 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                 | 9,000.00  |
| Telephone                   | 6,000.00  |
| 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           | 500.00    |
| Dues & Subscriptions              | 1,500.00  |
| Electricity                       | 4,500.00  |
| Employee Appreciation             | 1,500.00  |
| Equipment & Maintenance Contracts | 2,700.00  |
| 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          | 21,000.00  |                   |
| FT Pensions              | 9,500.00   |                   |
| Taxes (SUTA, MCARE & SS) | 15,000.00  |                   |
| Salary & Wages           |            |                   |
| Dir Admin/Online Content | 49,500.00  |                   |
| Contract Accountant      | 25,000.00  |                   |
| Executive Director       | 88,000.00  |                   |
| Sponsorships             | 5,000.00   |                   |
| Trash Removal            | 900.00     |                   |
| Water Bill               | 400.00     |                   |
|                          |            |                   |
|                          | 761,450.00 | <b>761,450.00</b> |

**Total Tourism Commission**

**Visitors Center**

|                              |            |                   |
|------------------------------|------------|-------------------|
| Alarm System                 | 300.00     |                   |
| Building Insurance           | 2,500.00   |                   |
| Building, Fencing, Upkeep    | 7,000.00   |                   |
| Cleaning Supplies            | 550.00     |                   |
| Contingency                  | 1,000.00   |                   |
| Contract Grounds Maintenance | 4,500.00   |                   |
| Contract Labor               | 450.00     |                   |
| Electricity                  | 4,000.00   |                   |
| Exterminating                | 900.00     |                   |
| 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      | 30,000.00  |                   |
| Visitors Center Manager      | 44,000.00  |                   |
| Signage                      | 10,000.00  |                   |
| Trash Removal                | 900.00     |                   |
| Water Bill                   | 600.00     |                   |
|                              |            |                   |
|                              | 110,950.00 | <b>110,950.00</b> |

|                       |
|-----------------------|
| <b>TOTAL EXPENSES</b> |
|-----------------------|

**901,500.00**

\*\*See Note  
Below

\*\*- We could get an additional funding in non-recurring from the Legislature

This budget was approved by the Commission's Board of Directors on June 18, 2025.

**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 \$50,000 in non-recurring funds for FY 2025/2026. 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 (\$20,000) and E-Newsletter Content and Distribution (\$10,000). We also have other Direct Marketing expenditures in a hybrid of Print/Digital Advertising (\$50,000), Website SEO (\$9,000), Inquiry Postage (\$20,000) 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, through the Compass campaign alone, our Google Ads Campaign search CTR (click through rate) is performing 5% higher than the industry average and our Google display campaign CTR is performing 371% higher than the industry average. Combined, our campaigns through Compass Media delivered 321,183 clicks to our website, 640,562 video views, 877 phone calls for more information, 5,578 conversions and 4,987 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, Sojern 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 72,000 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 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, 53,900 vehicles per day pass exit 33 on I-95 and 11,600 vehicles pass our driveway on Highway 17.**

**Specifically, those who benefit from our labor 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 year 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.

**Our year-round marketing efforts are directed to potential visitors beyond the 50-mile radius in complete compliance with the accommodations law statutes of the South Carolina General Assembly.**

**We contracted with Gray Research to do a Visitor Profile Study for us last year. 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 are 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 24/25, we can conclude that our Commission produces a direct expenditure \$36,788,232 from the trips taken by those who receive that collateral.

48,690 Collateral Pieces X 55% visits to the SC Lowcountry = 26,780

26,780 visits X \$1,803 average spend during vacation = \$48,283,439

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 100,264 room nights to Beaufort in FY 24/25 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 26,780 Guidebooks and brochures dispersed and 55% making a trip to the Lowcountry, that gives us 26,780 visiting parties. Of that, 72% reported Beaufort as their destination – 19,282 visiting parties staying an average of 5.2 nights = 100,264 room nights. Again, this does NOT include those receiving our information via our web site, events newsletter, attractions brochure or social media outlets.

In comparison, Tourism Economic's Symphony dashboard reports that there were 42,490 visits observed in our four-county region by people who viewed our website during FY 24/25. This is measured when someone goes on our website, and a pixel is placed on their mobile device. Then, when the person enters our geofenced four counties, the pixel fires and is counted as an observed visit attributed to our website.

If we use that figure for economic impact, we can justify the direct expenditure for visitors that viewed our website to be \$76,609,470 (42,490 visits spending \$1,803 per visit). Of those 42,490 visits 63.1% were observed in Beaufort County. 63.1% of \$76,609,470 equals \$48,340,576.

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 that 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 have monthly meetings with Tourism Economics which manages the Symphony dashboard that we use for geolocation data. This data must be used as a tool for trends in comparing how our visitors travel through our region, The website attribution data is a high-tech way to evaluate our digital campaigns that are orchestrated through Compass Media. The ability to use these two teams together has given us useful insights to increase our return on investment.

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.

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.

| CITY OF BEAUFORT ATAX FINANCIAL REPORT                      |  |                                    |                                  |
|---|--|------------------------------------|----------------------------------|
| SC Lowcountry Tourism Commission (organization name)        |  |                                    |                                  |
| Revenues  | Previous Year: Submit with Application (applies to previous year award recipients) | Projected: Submit with Application | Actual: Submit with Final Report |
| Admission Receipts  | 00   | 00                                 |                                  |
| Private Donations   | 2380   | 2500                               |                                  |
| City of Beaufort ATAX Request                               | 61800  | 72800                              |                                  |
| Beaufort County ATAX Request                                | 93300  | 82900                              |                                  |
| Hilton Head ATAX Request                                    | 00   | 127900                             |                                  |
| Town of Bluffton ATAX Request                               | 00   | 66700                              |                                  |
| Other ATAX Requests   | 44900  | 97200                              |                                  |
| Other Revenues (describe) TAG & STATE APPRS                 | 440000   | 445000                             |                                  |
| Total Revenues  | \$ 898000 -  | \$ 901500 -                        | \$ -                             |
| Projected Expenses  |  |                                    |                                  |
| Development of Event or Project (describe) CONTENT CREATION | 4770   | 10000                              |                                  |
| (describe) RESEARCH   | 00   | 51750                              |                                  |
| (describe) TRAVEL / REG / PER Diem                          | 00   | 12000                              |                                  |
| (describe)  |  |                                    |                                  |
| Total   | \$ 4770 -  | \$ 73750 -                         | \$ -                             |
| Promotional Activities                                      |  |                                    |                                  |
| Website   | 7976   | 12000                              |                                  |
| Podcast   |  |                                    |                                  |
| Other (describe)  |  |                                    |                                  |
| Total   | \$ 7976 -  | \$ 12000 -                         | \$ -                             |
| Advertising   |  |                                    |                                  |
| Print   | 47408  | 25000                              |                                  |
| Magazine w/ DIGITAL COMPONENTS                              | 65470  | 50000                              |                                  |
| Radio   | 00   | 00                                 |                                  |
| Television  |  |                                    |                                  |
| Billboard   | 35796  | 43000                              |                                  |
| Other (describe) DIGITAL & SOCIAL                           | 194018   | 276000                             |                                  |
| Total   | \$ 342692 -  | \$ 394000 -                        | \$ -                             |
| Other Eligible Expenses                                     |  |                                    |                                  |
| (describe) ENEWSLETTER                                      | 11642  | 13500                              |                                  |
| (describe) SCATE / PAN / TRAVEL SHOWS                       | 13433  | 23000                              |                                  |
| (describe) INFO BOOS / DIRECT MAIL                          | 25530  | 20500                              |                                  |
| (describe) VC OPERATIONS                                    | 00   | 110850                             |                                  |
| Total   | \$ 50605 -   | \$ 167850 -                        | \$ -                             |
| Total Expenses  | \$ 860485 -  | \$ 901500 -                        | \$ -                             |
| Net profit/Loss   | \$ 37515 -   | \$ 00 -                            | \$ -                             |
| Award Amount  | 61,800   | REQ 72,800                         |                                  |

# 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: Scheper Tennis and Learning Academy
2. Mailing Address: 811 Audusta Blvd City Beaufort State SC Postal Code 29902
3. Project Director: Janice Johnson
- Project Treasurer or Administrative Official: Kris Peterson
- Telephone : (843) 812-5642 Email: janice4tennis@gmail.com
4. Event or Project Name: Scheper Tennis Jr. and Adult Tournaments

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 by 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 3/2026 End – Month/Year 3/2026

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

6. Applicant Category (check all that apply)

- 1  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): 27-3171912

8. Total Estimated Costs of the Proposed Event or Project: \$ 5,000

Accommodation Tax Funds Requested: \$ \$2,500

Project Funding from Other Sources: \$ \$2,500

9. Source of Applicant's Other Funds: USTA Program Grants, Donations

10. What is the anticipated total attendance for your event? 50-100

Total "tourist" anticipated? 50

11. All applicants must make 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 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 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.**

I Janice Johnson have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on August 5, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name Janice Johnson

Signature 

Date August 15, 2025

# 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 by 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 make a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration: **Please see Attachment.**

\_\_\_\_\_

**12. Provide the information below as an attachment to your application: Please see Attachment.**

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 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 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.**

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". OGF representative attended the mandatory City of Beaufort ATAX Workshop on August 15, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

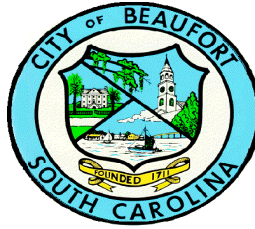
Printed Name Thomas Roy Hicks, II \_\_\_\_\_

Signature Thomas R. Hicks II \_\_\_\_\_

Date August 28, 2025

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### ATTACHMENT

The Original Gullah Festival of South Carolina, Inc. (OGF)

#### 11. Collaborative Marketing Effort

The Original Gullah Festival of South Carolina (OGF) works in close collaboration with the City of Beaufort’s Destination Marketing Organization (DMO) to set clear marketing and advertising goals, define strategies to attract tourists from 50+ miles away, and determine the investment of dollars across media outlets and ad placements. This partnership ensures that OGF’s marketing efforts align with the City’s broader tourism strategy and maximize visibility for both the festival and the region.

In addition, OGF coordinates with local businesses, cultural organizations, and nonprofits to promote the festival as an annual homecoming event that benefits the entire community. These collaborative efforts include cross-promotion of events, shared advertising opportunities, and encouraging visitors to explore Beaufort’s dining, shopping, and lodging options during the festival weekend. By leveraging partnerships and aligning strategies, OGF amplifies its reach and strengthens Beaufort’s reputation as a premier cultural and heritage destination.

#### 12. B. Defined Project Budget

2026 Gullah Festival City of Beaufort ATAX Request

|  |                 |
|--|-----------------|
| Digital & Social Media Advertising           | \$ 3,000        |
| Magazine Advertising                         | 2,500           |
| Television Advertising                       | 10,000          |
| Billboards                                   | 11,000          |
| Radio Advertising                            | 500             |
| Shuttle Service                              | 8,000           |
| Fireworks Finale                             | 15,000          |
| <b>Total Amount Included in this request</b> | <b>\$50,000</b> |

#### 12. C. Event Summary Description (100 words)

The Original Gullah Festival of South Carolina is a three-day cultural celebration held each Memorial Day weekend in Beaufort. For more than 40 years, the festival has honored the history, heritage, and contributions of the Gullah people through music, dance, storytelling, food, and art. Following the tremendous success of the 2025 focus on the American Revolution, the 2026 festival will again feature the “Gullah American Revolution Village” and related programming,

ensuring visitors experience the Gullah people’s vital role in America’s founding while celebrating culture, community, and heritage tourism.

#### **12. D. Purpose, Identity & Benefit**

The Original Gullah Festival (OGF) was founded to preserve, promote, and share the unique history, heritage, and cultural contributions of the Gullah people. The proposed 2026 festival directly reflects this purpose by showcasing Gullah traditions through music, art, storytelling, food, and historical interpretation. The repeat focus on the Gullah people’s role in the American Revolution reinforces OGF’s mission to tell a fuller, more inclusive story of America’s past.

In addition to fulfilling its cultural mission, OGF generates significant tourism impact. The festival drew more than 13,000 attendees from across the country in 2025, with Columbia, SC; Savannah and Atlanta, GA; Jacksonville, FL; Charlotte, NC; and the Greenville–Spartanburg, SC region leading origin markets for visitors. Thirty-seven percent of attendees were tourists, and 70% of those visitors traveled from out of state. This level of participation demonstrates the festival’s reach and its substantial economic benefit to the City of Beaufort, as visitors extend their stay to enjoy local lodging, dining, shopping, and cultural attractions.

OGF is also deeply connected to the Memorial Day holiday, making it a uniquely fitting anchor event during the naturally peak holiday weekend and unofficial kickoff of summer. Rooted in the traditions of the Gullah people, Memorial Day began when formerly enslaved Gullah decorated the graves of fallen heroes after the Civil War—a practice the nation later adopted. Today, OGF carries forward that legacy by combining cultural celebration with remembrance, drawing people from diverse nationalities and origins. For many, attending the festival is a “bucket list” experience that they plan years in advance, ensuring that Beaufort remains a premier holiday weekend destination because of the festival’s enduring presence.

#### **12. E Impact on Tourism**

The Original Gullah Festival (OGF) is one of Beaufort’s strongest tourism drivers, attracting thousands of visitors annually during the Memorial Day weekend. In 2025, the festival drew more than 13,000 attendees, with 37% identified as tourists and 70% of those tourists traveling from out of state. Primary origin markets included Columbia, SC; Savannah and Atlanta, GA; Jacksonville, FL; Charlotte, NC; and the Greenville–Spartanburg region. These percentages demonstrate that more than one-third of festival expenditures are directly attributable to tourists, with the majority of those dollars representing new spending in Beaufort’s lodging, dining, shopping, and attractions.

The festival’s timing during Memorial Day weekend, a peak travel period and the unofficial kickoff of summer, strengthens Beaufort’s position as a destination for heritage and cultural tourism. Because of OGF’s historical significance—rooted in Gullah traditions of honoring fallen heroes and helping to shape the modern Memorial Day observance—the festival has become a “bucket list” event for many, drawing attendees who plan years in advance to attend at least once in their lifetime. This repeat and long-term demand ensures sustainable tourism impact for Beaufort.

The festival also amplifies the reach of Beaufort’s tourism industry through coordinated marketing with the City’s Destination Marketing Organization, ensuring that visitor spending and overnight stays remain directly tied to measurable tourism-related expenditures. In 2025, OGF received \$35,000 in City ATAX funding. With more than 13,000 attendees, including an estimated 4,800 tourists (3,300 of them from out of state), the festival generated millions in direct and indirect visitor spending. Using conservative industry estimates of \$150 per day per tourist, OGF produced approximately \$720,000 in visitor spending. This represents a return on investment (ROI) of more than **20:1** for the City of Beaufort.

## Return on Investment (ROI) – 2025 Original Gullah Festival

- **City of Beaufort ATAX Investment:** \$35,000
- **Total Attendance:** 13,000+
- **Tourist Percentage:** 37% ( $\approx$  4,800 visitors)
- **Out-of-State Visitors:** 70% of tourists ( $\approx$  3,300 visitors)
- **Estimated Visitor Spending (conservative \$150/day):** \$720,000
- **ROI:**  $\$720,000 \div \$35,000 = 20.6:1$

## 12. Project Evaluation

The effectiveness of the Original Gullah Festival in attracting and providing for tourists will be evaluated through a combination of data-driven analysis and direct visitor feedback. We will continue to utilize the data analytics provided by the City's Destination Marketing Organization (DMO), which tracks visitor origin, travel trends, and market reach. In addition, we gather direct and anecdotal feedback from attendees during the event to better understand their experiences and needs.

Beginning in 2024, OGF implemented attendee surveys to collect detailed information about our festivalgoers, including where they are traveling from, length of stay, and suggestions for improvement. These surveys provide valuable insights into visitors' behavior and expectations, helping us to identify opportunities to strengthen the festival experience, expand our marketing reach, and maximize tourism impact. This combination of professional analytics and firsthand input ensures a well-rounded evaluation process and demonstrates the festival's ongoing commitment to growth, accountability, and continuous improvement.

###

|  | TOTAL               |
|--|---------------------|
| <b>Revenue</b>                                     |                     |
| Sales  |                     |
| Festival Sales                                     | \$17,500.00         |
| Festival-Square Sales                              | 10,000.00           |
| Festivals - Paypal                                 | 20,000.00           |
| Government grants & contracts                      |                     |
| ATAX Funding                                       | 100,000.00          |
| SC American Revolution Sestercentennial Commission | 75,000.00           |
| Arts Foundations                                   | 15,000.00           |
| Other Support                                      |                     |
| Public Support & Donations                         | 5,000.00            |
| Corporate Support & Sponsorships                   | 20,000.00           |
| Private Foundation Grants                          | 30,000.00           |
| <b>Total Projected Revenue</b>                     | <b>\$292,500.00</b> |
| <b>Expenditures</b>                                |                     |
| <b>Entertainment</b>                               |                     |
| Awards, Donations, Trophies, etc.                  | \$ 3,000.00         |
| Performers   | 35,000.00           |
| Fireworks Finale                                   | 15,000.00           |
| <b>Total Entertainment Expenses</b>                | <b>53,000.00</b>    |
| <b>Contractual Services &amp; Fees</b>             |                     |
| Contract & professional fees                       | 10,000.00           |
| Contractual Services                               | 45,000.00           |
| Security & Safety Services                         | 25,000.00           |
| <b>Total Contract &amp; Professional Fees</b>      | <b>80,000.00</b>    |
| <b>Equipment &amp; Space Rental</b>                |                     |
| Equipment Rental                                   | 5,000.00            |
| Vehicle rental                                     | 5,000.00            |
| Insurance  | 3,000.00            |
| Other Space Rental                                 | 2,500.00            |
| Parking Space Rental                               | 3,000.00            |
| Telephone & Internet                               | 400.00              |
| Rent   | 3,500.00            |
| <b>Total Equipment &amp; Space Rental</b>          | <b>22,400.00</b>    |
| <b>Other Business Expense</b>                      |                     |
| Office expenses                                    | 2,500.00            |
| Bank fees & service charges                        | 750.00              |
| Fees & Charges                                     | 2,400.00            |
| Memberships & subscriptions                        | 1,000.00            |
| Printing & photocopying                            | 1,000.00            |
| Shipping & postage                                 | 300.00              |
| Software & apps                                    | 7,950.00            |
| <b>Total Other Business Expenses</b>               | <b>7,950.00</b>     |
| <b>Advertising &amp; Promotion</b>                 |                     |
| Radio, TV, Magazine, etc. Advertising & Promotion  | <b>100,000.00</b>   |

|   |                           |
|---|---------------------------|
| <b>Event Supplies &amp; Expenses</b>        |                           |
| Supplies & Decorations                      | 3,500.00                  |
| Hospitality                                 | 1,500.00                  |
| <b>Total Event Supplies &amp; Materials</b> | <u>5,000.00</u>           |
| <b>Travel Expenses</b>                      |                           |
| Airfare                                     | 1,000.00                  |
| Hotels                                      | 10,000.00                 |
| <b>Total Travel</b>                         | <u>11,000.00</u>          |
| <b>Vehicle Expenses</b>                     |                           |
| Vehicle gas & fuel                          | 1,000.00                  |
| Vehicle insurance                           | 6,500.00                  |
| Vehicle registration                        | 1,500.00                  |
| Vehicle repairs                             | 1,000.00                  |
| <b>Total Vehicle expenses</b>               | <u>10,000.00</u>          |
| <b>Total Expenditures</b>                   | <u>\$289,350.00</u>       |
| <hr/>                                       |                           |
| <b>Projected Net Revenue</b>                | <u><u>\$ 3,150.00</u></u> |

# 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 2025-2026

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 24-25 - \$160,000 for destination marketing
- 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 2025 (In PROGRESS) June 2026  
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: \$545,549

Accommodation Tax Funds Requested: \$ 160,000

Project Funding from Other Sources: \$ 385,549

9. Source of Applicant's Other Funds: **We are the designated Destination Marketing Organization for Northern 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 700,000+**
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 Destination Marketing Organization, we are dedicated to working hand in hand with nonprofits, event organizers, municipalities, and the county to promote our region. Our goal is to elevate awareness through a comprehensive marketing program that showcases the attractions, festivals, and partners that define our community's unique character. Looking ahead, we will also focus on capturing new markets and opening fresh opportunities for our stakeholders.**
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 PROVED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.**

I **Robb Wells** have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on **August 15** and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025- 2026 Accommodations Tax Funds. Printed

Name **Robb Wells**  
Signature   
Date **8-26-25**

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

RETURN TO:

**CITY OF BEAUFORT  
ATTENTION: Finance Department c/o TDAC  
1911 Boundary Street  
Beaufort, SC 29902**

**For questions, please call 843-525-7070**



**Working GBPRCVB BUDGET 2025-2026 || Budget**

|   | <b>25-26FY</b>      |
|---|---------------------|
| Ordinary Income/Expense                                 |                     |
| DMO Cash On hand  | 150,000.00          |
| Income  |                     |
| 40000 · REVENUES  |                     |
| 43000 · GOVERNMENT SUPPORT/GRANTS                       |                     |
| <b>Total 43000 · GOVERNMENT SUPPORT/GRANTS</b>          | <b>1,235,500.00</b> |
| Total 44000 · MARKETING SALES                           | 31,900.00           |
| Total 45000 · OTHER SALES                               | <b>24,850.00</b>    |
| 49900 - MISCELLANEOUS INCOME                            | <b>10,000.00</b>    |
| Total 40000 · REVENUES                                  | <b>1,452,250.00</b> |
| Expense   |                     |
| 50000 · PERSONNEL EXPENSES                              |                     |
| <b>Total 50000 · PERSONNEL EXPENSES</b>                 | <b>552,500.00</b>   |
| 60000 · NON-PERSONNEL EXPENSES                          |                     |
| 61000 · GENERAL EXPENSES                                |                     |
| <b>61100 · SUPPLIES</b>                                 | <b>8,000.00</b>     |
| <b>61110 · POSTAGE &amp; SHIPPING</b>                   | <b>5,000.00</b>     |
| <b>Total 61200 · PRINTING</b>                           | <b>4,500.00</b>     |
| 61300 · ADVERTISING                                     |                     |
| 61310 · PRINT ADVERTISING                               | 45,000.00           |
| 61320 · ELECTRONIC MEDIA                                | 207,549.00          |
| 61330 · SEO   | 18,000.00           |
| 61340 · BILLBOARDS - Out of Home                        | 20,000.00           |
| 61350 · SOCIAL MEDIA                                    | 80,000.00           |
| 61360 · EMAIL MARKETING                                 | 14,000.00           |
| 61370 · PUBLIC RELATIONS                                | 28,000.00           |
| 61380 · WEBSITE   | 37,000.00           |
| 61381 · WEBSITE - PLUGINS                               | 16,000.00           |
| 61391 · PODCAST   | 40,000.00           |
| 61392 · FESTIVAL/EVENT ADVERTISING CO-OP                | 25,000.00           |
| 61398 · DESIGN/PHOTOGRAPHY SERVICES                     | 6,500.00            |
| 61399 · AD PRODUCTION/GRAPHIC DESIGN                    | 8,500.00            |
| <b>Total 61300 · ADVERTISING</b>                        | <b>545,549.00</b>   |
| 61400 - SALES - GROUPS & MEETINGS                       |                     |
| 61405 - MEMBERSHIPS/DUES                                | 4,500.00            |
| 61410 - TRAVEL  | 23,000.00           |
| 61420 - TRADESHOWS & MEETINGS                           | 45,000.00           |
| 61430 - PROMOTIONAL ITEMS                               | 7,000.00            |
| 61450 - PRINTING  |                     |
| 61460 - ADVERTISING                                     | 25,000.00           |
| 61470 - FAM TOURS/SITE VISITS                           | 17,000.00           |
| 61390 - BEAUFORT AREA SPORTS COUNCIL                    |                     |
| <b>Total 61400 - SALES - GROUPS &amp; MEETINGS</b>      | <b>121,500.00</b>   |
| <b>Total 61500 · TELEPHONE &amp; TELECOMMUNICATIONS</b> | <b>4,000.00</b>     |
| <b>Total 61600 · BUSINESS/LIABILITY INSURANCE</b>       | <b>5,000.00</b>     |
| 61700 · TRAVEL/COMMUNITY RELATIONS                      |                     |
| 61710 · TRAVEL  | 3,000.00            |
| 61720 · COMMUNITY RELATIONS                             | 7,500.00            |
| 61750 · BOARD MEETINGS/RETREATS                         |                     |
| 61760 · TRADE SHOWS/EVENTS                              | 2,000.00            |
| 61770 · FAM TOURS - PR SITE VISITS                      | 3,000.00            |
| <b>Total 61700 · TRAVEL AND MEALS</b>                   | <b>15,500.00</b>    |
| <b>61800 · DUES &amp; SUBSCRIPTIONS</b>                 | <b>12,500.00</b>    |
| <b>61850 · STAFF DEVELOPMENT/TRAINING</b>               | <b>2,500.00</b>     |
| <b>Total 61900 · FEES/SERVICE CHARGES</b>               | <b>5,500.00</b>     |

|   |                     |
|---|---------------------|
| <b>Total 61000 · GENERAL EXPENSES</b>             | <b>729,549.00</b>   |
| <b>Total 62000 · OCCUPANCY EXPENSES</b>           | <b>52,301.00</b>    |
| <b>Total 63000 · EQUIPMENT</b>                    | <b>8,750.00</b>     |
| 64000 · CONTRACT SERVICES/PROF. FEES              |                     |
| 64100 · ACCOUNTING & AUDIT                        | 34,000.00           |
| 64150 · RETIREMENT PLAN ADMIN.                    | 1,000.00            |
| 64400 · RESEARCH                                  | 50,000.00           |
| 64700 · FULFILLMENT SERVICES                      | 12,500.00           |
| 64900 · OTHER SERVICES                            |                     |
| 64910 · DOCUMENT SHREDDING SERVICE                | 150.00              |
| 64920 · ACCOUNT SERVICES                          | 4,000.00            |
| 64930 · MEDIA PLACEMENT                           | 4,000.00            |
| <b>Total 64900 · OTHER SERVICES</b>               | <b>8,150.00</b>     |
| <b>Total 64000 · CONTRACT SERVICES/PROF. FEES</b> | <b>105,650.00</b>   |
| <b>Total 69000 · OTHER EXPENSES</b>               | <b>3,500.00</b>     |
| Total 60000 · NON-PERSONNEL EXPENSES              | 899,750.00          |
| <b>Total Expense</b>                              | <b>1,452,250.00</b> |
| Net Ordinary Income                               | 0.00                |

|                                      |     |
|--------------------------------------|-----|
| Allocation of Expenditures Personnel | 38% |
| Advertising & Sales                  | 46% |
| Research                             | 9%  |

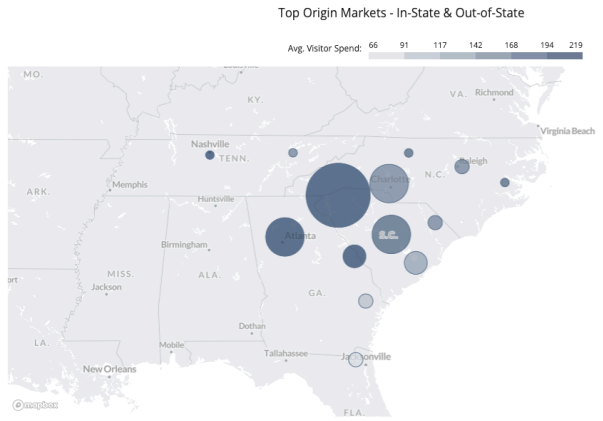






Research confirms that visitors to Northern Beaufort County are drawn to outdoor activities, open spaces, and the ease of accessibility by car. Our “InnerCoastal Campaign” is tailored to these motivations, showcasing Beaufort’s authentic character and ensuring that both our community and our partners share in the benefits of increased awareness and visitation.

Current Top Markets:



| Visitor Market Area                       | % Visitors |
|---|------------|
| Greenville-Spartanburg-Asheville-Anderson | 11.3%      |
| Columbia SC                               | 8.5%       |
| Charlotte NC                              | 8.2%       |
| Atlanta GA                                | 7.7%       |
| Augusta GA                                | 6.0%       |
| Charleston SC                             | 3.9%       |
| Savannah GA                               | 2.8%       |
| Raleigh-Durham (Fayetteville) NC          | 2.4%       |
| Jacksonville FL                           | 2.3%       |
| Florence-Myrtle Beach SC                  | 2.1%       |

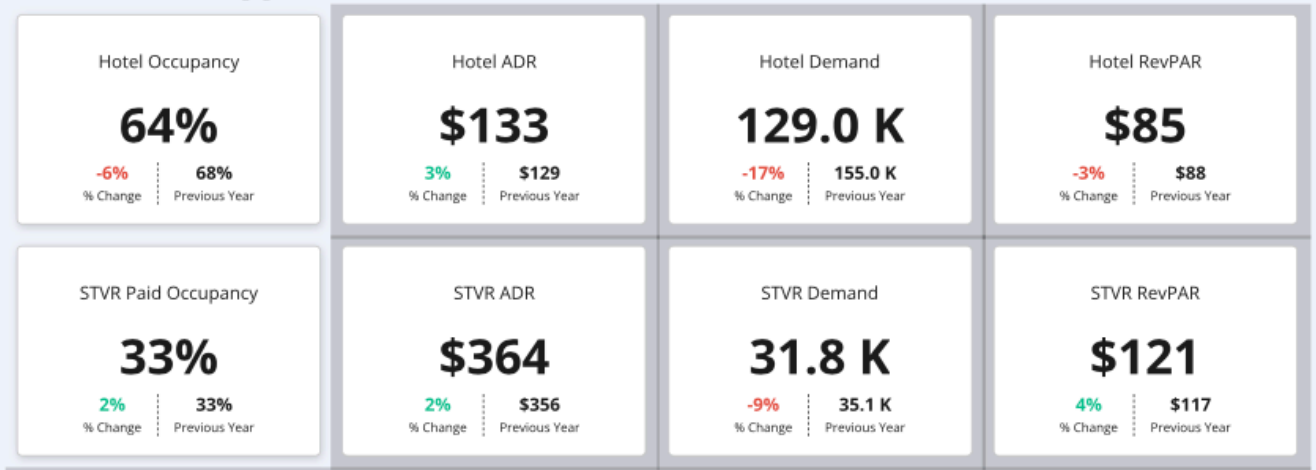
## Appendix D

The proposed campaign is expected to generate measurable impact on tourism in Beaufort, Port Royal, and the Sea Islands by driving new visitation and strengthening the lodging sector, which is a cornerstone of the local tourism economy. Recent data underscores both the opportunities and the need for continued investment: hotel occupancy averaged **64%** over the past year, down from 68% the year prior, while demand dropped **17%**. In contrast, short-term vacation rentals (STVR) held steadier with **33% paid occupancy** and modest growth in ADR (+2%), demonstrating traveler appetite for extended stays averaging **4.6 days**.

By promoting Beaufort in targeted drive markets, this initiative will help stabilize and grow hotel demand, encourage longer stays, and increase per-visitor spending. The expected benefits extend beyond accommodations to restaurants, retailers, cultural attractions, and tour operators—each of which relies heavily on a strong visitor economy. With the average hotel stay generating **\$281** in total value and STVR stays averaging over **\$1,600**, even modest gains in visitation translate into significant revenue for local businesses and tax collections

### Key Lodging KPIs for Reporting

Use this section to report key insights about your hotels and short-term vacation rentals (STVR). Observed hotel demand is for properties reporting into the Amadeus system and will not reflect 100% of all properties in your destination. Use this to understand year-over-year demand trends. Zartico recommends using lodging tax data as the most authoritative measure of total lodging revenue and demand.

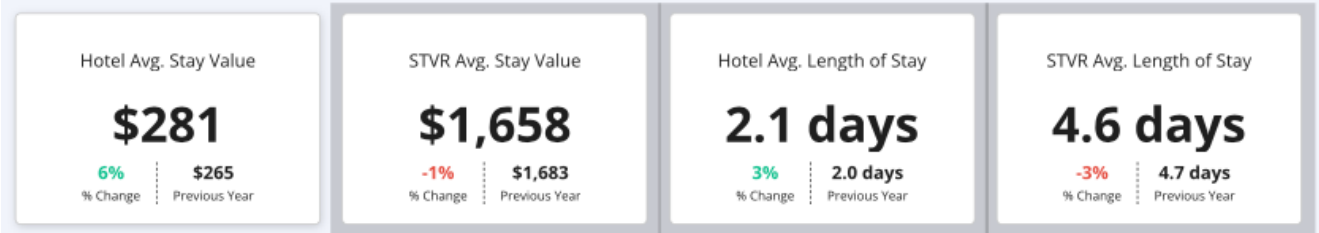


### Summary KPIs

Source: Zartico Lodging Data.

KPI metrics display short-term vacation rental (STVR) and hotel performance for your primary geographic area.

Use the filter at the top to filter all insights by STVR or hotel performance. Twelve-month rolling trends can be found in the sections below.



## 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.

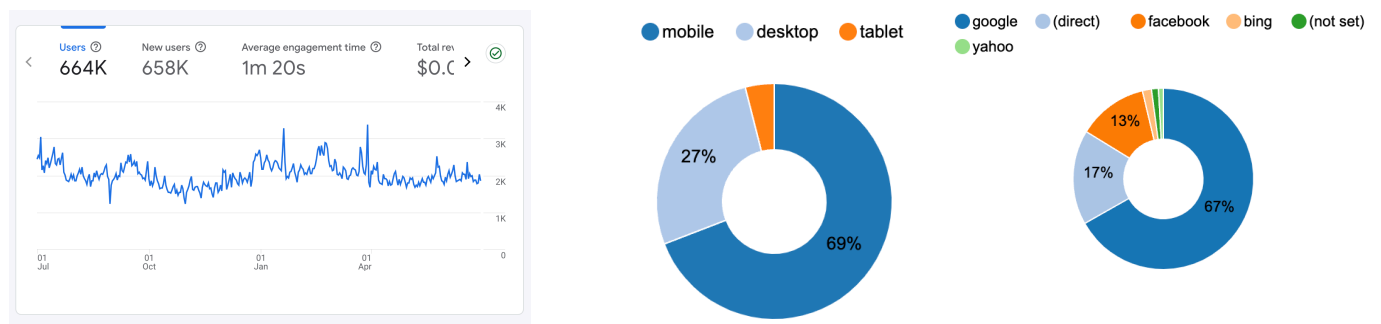
**Occupancy/Smith Travel Report/KeyDATA** – The GBPRCVB – in partnership with area hotels and short term rentals – subscribes to the monthly Smith Travel Report, as well as KEY DATA, which tracks and reports data for the overnight lodging industry including occupancy, average daily rate, supply and demand 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.

**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 45,000 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: 2025-2026 Sales Plan - FY 25/26

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 FY24-25 \$40,000 for Sales
- City ATAX Grant FY 23-24 \$34,500 for Sales
- City ATAX GRANT FY 22-23 \$31,000 for Sales

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 2025 Project started) June 2026  
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: \$ 121,500

Accommodation Tax Funds Requested: \$ 45,000

Project Funding from Other Sources: \$ 76,500

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

10. What is the anticipated total attendance for your event? Total "tourist" anticipated? 700,000+\_\_\_\_\_

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 a core function of our Convention and Visitors Bureau (DMO) and directly supports our mission to strengthen the local visitor economy. By collaborating with stakeholders, we develop and execute sales strategies that raise awareness of Beaufort, Port Royal, and the Sea Islands while converting interest into confirmed bookings for our community.**

**This grant will enable us to expand sales outreach into new market segments, positioning our destination in a proactive and competitive manner. The enhanced sales efforts will create measurable benefits for a wide range of stakeholders—including hotels, short-term rentals, restaurants, attractions, event organizers, and cultural institutions—by driving increased visitation and visitor spending.**

**Ultimately, this initiative ensures that our community, businesses, and residents experience the economic and quality-of-life benefits generated through a thriving tourism industry.**

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?


**The effectiveness of our group sales program is measured through clear performance metrics, including leads generated, bookings confirmed, and resulting room nights. We also track estimated economic impact using industry-standard models to capture visitor spending across lodging, dining, retail, and attractions. Conversion rates and return on investment are evaluated to ensure resources are effectively applied. Additionally, feedback from meeting planners and local partners provides qualitative insights. Together, these measures allow us to assess both immediate outcomes and the program's long-term impact on strengthening Beaufort's tourism economy.**

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

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

I Robb Wells have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on August 15 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025- 2026 Accommodations Tax Funds. Printed

Name Robb Wells

Signature 

Date 8-26-25

## Appendix A

**Working GBPRCVB BUDGET 2025-2026 || Budget**

|   | <b>25-26FY</b>      |
|---|---------------------|
| Ordinary Income/Expense                                 |                     |
| DMO Cash On hand  | 150,000.00          |
| Income  |                     |
| 40000 · REVENUES  |                     |
| 43000 · GOVERNMENT SUPPORT/GRANTS                       |                     |
| <b>Total 43000 · GOVERNMENT SUPPORT/GRANTS</b>          | <b>1,235,500.00</b> |
| Total 44000 · MARKETING SALES                           | 31,900.00           |
| Total 45000 · OTHER SALES                               | <b>24,850.00</b>    |
| 49900 - MISCELLANEOUS INCOME                            | <b>10,000.00</b>    |
| Total 40000 · REVENUES                                  | <b>1,452,250.00</b> |
| Expense   |                     |
| 50000 · PERSONNEL EXPENSES                              |                     |
| <b>Total 50000 · PERSONNEL EXPENSES</b>                 | <b>552,500.00</b>   |
| 60000 · NON-PERSONNEL EXPENSES                          |                     |
| 61000 · GENERAL EXPENSES                                |                     |
| <b>61100 · SUPPLIES</b>                                 | <b>8,000.00</b>     |
| <b>61110 · POSTAGE &amp; SHIPPING</b>                   | <b>5,000.00</b>     |
| <b>Total 61200 · PRINTING</b>                           | <b>4,500.00</b>     |
| 61300 · ADVERTISING                                     |                     |
| 61310 · PRINT ADVERTISING                               | 45,000.00           |
| 61320 · ELECTRONIC MEDIA                                | 207,549.00          |
| 61330 · SEO   | 18,000.00           |
| 61340 · BILLBOARDS - Out of Home                        | 20,000.00           |
| 61350 · SOCIAL MEDIA                                    | 80,000.00           |
| 61360 · EMAIL MARKETING                                 | 14,000.00           |
| 61370 · PUBLIC RELATIONS                                | 28,000.00           |
| 61380 · WEBSITE   | 37,000.00           |
| 61381 · WEBSITE - PLUGINS                               | 16,000.00           |
| 61391 · PODCAST   | 40,000.00           |
| 61392 · FESTIVAL/EVENT ADVERTISING CO-OP                | 25,000.00           |
| 61398 · DESIGN/PHOTOGRAPHY SERVICES                     | 6,500.00            |
| 61399 · AD PRODUCTION/GRAPHIC DESIGN                    | 8,500.00            |
| <b>Total 61300 · ADVERTISING</b>                        | <b>545,549.00</b>   |
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| 61405 · MEMBERSHIPS/DUES                                | 4,500.00            |
| 61410 · TRAVEL  | 23,000.00           |
| 61420 · TRADESHOWS & MEETINGS                           | 45,000.00           |
| 61430 · PROMOTIONAL ITEMS                               | 7,000.00            |
| 61450 · PRINTING  |                     |
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| 61470 · FAM TOURS/SITE VISITS                           | 17,000.00           |
| 61390 · BEAUFORT AREA SPORTS COUNCIL                    |                     |
| <b>Total 61400 · SALES - GROUPS &amp; MEETINGS</b>      | <b>121,500.00</b>   |
| <b>Total 61500 · TELEPHONE &amp; TELECOMMUNICATIONS</b> | <b>4,000.00</b>     |
| <b>Total 61600 · BUSINESS/LIABILITY INSURANCE</b>       | <b>5,000.00</b>     |
| 61700 · TRAVEL/COMMUNITY RELATIONS                      |                     |
| 61710 · TRAVEL  | 3,000.00            |
| 61720 · COMMUNITY RELATIONS                             | 7,500.00            |
| 61750 · BOARD MEETINGS/RETREATS                         |                     |
| 61760 · TRADE SHOWS/EVENTS                              | 2,000.00            |
| 61770 · FAM TOURS - PR SITE VISITS                      | 3,000.00            |
| <b>Total 61700 · TRAVEL AND MEALS</b>                   | <b>15,500.00</b>    |
| <b>61800 · DUES &amp; SUBSCRIPTIONS</b>                 | <b>12,500.00</b>    |
| <b>61850 · STAFF DEVELOPMENT/TRAINING</b>               | <b>2,500.00</b>     |
| <b>Total 61900 · FEES/SERVICE CHARGES</b>               | <b>5,500.00</b>     |

|   |                     |
|---|---------------------|
| <b>Total 61000 · GENERAL EXPENSES</b>             | <b>729,549.00</b>   |
| <b>Total 62000 · OCCUPANCY EXPENSES</b>           | <b>52,301.00</b>    |
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| 64000 · CONTRACT SERVICES/PROF. FEES              |                     |
| 64100 · ACCOUNTING & AUDIT                        | 34,000.00           |
| 64150 · RETIREMENT PLAN ADMIN.                    | 1,000.00            |
| 64400 · RESEARCH                                  | 50,000.00           |
| 64700 · FULFILLMENT SERVICES                      | 12,500.00           |
| 64900 · OTHER SERVICES                            |                     |
| 64910 · DOCUMENT SHREDDING SERVICE                | 150.00              |
| 64920 · ACCOUNT SERVICES                          | 4,000.00            |
| 64930 · MEDIA PLACEMENT                           | 4,000.00            |
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| <b>Total 64000 · CONTRACT SERVICES/PROF. FEES</b> | <b>105,650.00</b>   |
| <b>Total 69000 · OTHER EXPENSES</b>               | <b>3,500.00</b>     |
| Total 60000 · NON-PERSONNEL EXPENSES              | 899,750.00          |
| <b>Total Expense</b>                              | <b>1,452,250.00</b> |
| Net Ordinary Income                               | 0.00                |

|                                      |     |
|--------------------------------------|-----|
| Allocation of Expenditures Personnel | 38% |
| Advertising & Sales                  | 46% |
| Research                             | 9%  |



# 2025-2026 Sales Budget/Marketing Plan

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

## TRADE SHOW REGISTRATION AND TRAVEL (61410/61420)

### **SYTA - Savannah - 8/8/22-26/2025**

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. Two delegates will attend this year. Beaufort will host. Pre-conference FAM tour for tour operators on 8/21.

|                      |            |
|----------------------|------------|
| Registration (2 ppl) | \$3,050.00 |
| Transportation       | 250.00     |
| Accommodation        | 2,000.00   |
| Per Diem             | 300.00     |

(See estimated FAM Tour expenses below)

**ESTIMATED COST** **\$5,600.00**

### **MCASC (MOTORCOACH ASSOC OF SC) - Atlanta, GA - 7/20-23/2025**

Joint show with SC, GA, & AL 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       | 200.00   |

**ESTIMATED COST** **\$1,700.00**

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

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

|              |            |
|--------------|------------|
| Registration | \$2,500.00 |
| Airfare      | 500.00     |
| Accom        | 1,000.00   |
| Per Diem     | 300.00     |

**ESTIMATED COST** **\$4,300.00**

### **Small & Boutique Meetings Fall Meet- Knoxville, TN - 10/12-14, 2025**

|                |            |
|----------------|------------|
| Registration   | \$4,500.00 |
| Airfare        | 500.00     |
| Accommodations | 500.00     |
| PerDiem        | 200.00     |

**ESTIMATED COST** **\$5,700.00**

**Accent East** -York, PA - 11/14-18/2025

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       | 200.00                |                   |
|                | <b>ESTIMATED COST</b> | <b>\$1,699.00</b> |

**Travel South International Showcase** - Kansas City, MO - 11/30-12/4, 2025

*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            |                   |
| Transportation | 600.00                |                   |
| Accommodations | 1,200.00              |                   |
| Per Diem       | 200.00                |                   |
|                | <b>ESTIMATED COST</b> | <b>\$4,595.00</b> |

**ABA-** American Bus Association Marketplace - Reno, NV - 1/10-13, 2026

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 | 3,500.00 (furnishings, shipping, entertainment) |                    |
| Airfare (3 ppl)         | 1,500.00  |                    |
| Accom (3 ppl)           | 2,750.00  |                    |
| Pe Diem                 | 400.00  |                    |
|                         | <b>ESTIMATED COST</b>                           | <b>\$17,040.00</b> |

**SCSAE** - Columbia, SC - January 2026

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                |                   |
| Door prize/basket      | 150.00                |                   |
| Per Diem               | 50.00                 |                   |
|                        | <b>ESTIMATED COST</b> | <b>\$1,425.00</b> |

**United Motorcoach Association Expo - 2/11-14/2026 - Birmingham, AL**  
(Co-sponsor with Dynamic Destinations)

|                |          |
|----------------|----------|
| Registration   | \$895.00 |
| Sponsorship    | \$500.00 |
| Transportation | 400.00   |
| Accommodations | 500.00   |
| Per Diem       | 200.00   |

**ESTIMATED COST** **\$2,495.00**

**Rendezvous South - Myrtle Beach, SC - February 2026**

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 |
| Transportation  | 400.00     |
| Accommodation   | 800.00     |
| Per Diem        | 200.00     |
| Gifts/Giveaways | 200.00     |
| Booth Decor     | 200.00     |

(See estimated FAM Tour expenses below)

**ESTIMATED COST** **\$6,300.00**

**Select Traveler - Williamsburg, VA**

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**

**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 Diem           | 100.00    |

**ESTIMATED COST** **\$ 2,595.00**

**NTA CONTACT - 5/7-10/2026 - Charleston, SC**

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 | 3,000.00              |                   |
| Transportation    | 300.00                |                   |
| Accommodations    | 600.00                |                   |
| Per Diem          | 200.00                |                   |
|                   | <b>ESTIMATED COST</b> | <b>\$5,600.00</b> |

**MPI - CC - MAY 2026 - Location TBD**

|                |                       |                   |
|----------------|-----------------------|-------------------|
| Registration   | \$650.00              |                   |
| Transportation | 250.00                |                   |
| Accommodations | 400.00                |                   |
| Per Diem       | 200.00                |                   |
|                | <b>ESTIMATED COST</b> | <b>\$1,500.00</b> |

**SCSAE - Annual Convention - May-June 2026 - 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                |                   |
| Per Diem           | 100.00                |                   |
| Sponsorship        | 2,000.00              |                   |
|                    | <b>ESTIMATED COST</b> | <b>\$3,325.00</b> |

**TRADE SHOWS (61410)** \$44,219.00  
*(Registration, sponsorships, booth expenses)*

**TRAVEL (61420)** \$22,750.00  
*(Transportation, Accommodations, Per Diem)*

**TOTAL PROJECTED TRAVEL/TRADE SHOW BUDGET - \$66,969.00**

**FAM TOURS/SITE VISITS/CLIENT EVENTS (61470)**

|                                  |                         |                    |
|----------------------------------|-------------------------|--------------------|
| SYTA FAM Tour                    | \$6,000.00              |                    |
| Meeting Planner FAM Tour         | \$8,000.00              |                    |
| Client events during Trade Shows | \$5,000.00              |                    |
|                                  | <b>PROJECTED BUDGET</b> | <b>\$17,000.00</b> |

**MARKETING MATERIALS/EXHIBITS/GIVEAWAYS**

|                            |                         |                   |
|----------------------------|-------------------------|-------------------|
| Client gifts/giveaways     | \$3,000.00              |                   |
| Booking incentives         | 1,000.00                |                   |
| Updated Table-top exhibits | 500.00                  |                   |
| Updated Banner exhibits    | 1,000.00                |                   |
|                            | <b>PROJECTED BUDGET</b> | <b>\$7,000.00</b> |

**ANNUAL MEMBERSHIP DUES (61405)**

|                       |                         |                   |
|-----------------------|-------------------------|-------------------|
| SCSAE Palmeto Partner | \$1,050.00              |                   |
| ABA                   | 650.00                  |                   |
| MCASC                 | 275.00                  |                   |
| SYTA                  | 1,195.00                |                   |
| MPI-CC                | 495.00                  |                   |
| NTA                   | 800.00                  |                   |
|                       | <b>PROJECTED BUDGET</b> | <b>\$4,465.00</b> |

**TRADE ADVERTISING/Print & Digital (61460)**

|   |                         |                    |
|---|-------------------------|--------------------|
| Multi View Digital Campaign/Tour & Meetings | \$18,000.00             |                    |
| Group Tour Magazine                         | 5,000.00                |                    |
| SCSAE Annual Directory                      | \$2,500.00              |                    |
| Un-planned Opportunities                    | \$10,000.00             |                    |
|   | <b>PROJECTED BUDGET</b> | <b>\$35,500.00</b> |

**TOTAL SALES BUDGET - \$130,934.00**





RFP's Sent:

10/2-5/2025 -USMC Platoon 2048th 30 year reunion -30 ppl  
8/9-11/2026 - SCSAE Annual Meeting - 100 attendees  
3/2-3/2026 - USCB/Rhythm of Dance cast and crew - 17 rooms  
9/22-25/2025 - Directions Tours - 25 rooms  
2/18-20/2026 - SC American Fisheries Society - 50 rooms  
2/21-23/2026 - Zeta Tua Alpha Alumni Meeting - 125 pp -50-75 rooms  
3/26 or 4/16/2026 - Novant SC Physicians Meeting - meetings space only  
6/13-15/2025 - Brilliant Adventures - 25 rooms  
03/15-16/2025- U.S. Kids Golf State Invitational 135 families  
06/11-13/2025 - Southern Junior Championship 156 players  
07/18-20/2024 - Family Reunion 30 people at the Best Western  
09/21/2024 - Foundry Boxing Event 10 rooms at the Hilton

Trade Show leads sent:

SYTA - 28  
VA, SC, NC Joint Show - 20  
Small Market Meeting Conference - 23  
Teams- 70  
NTA - 17  
Accent East - 20  
Travel South International - 38  
ABA - 63  
Sports ETA -13  
Rendezvous South - 27  
Travel Alliance Partners - 19  
SCSAE - 75  
ATTC - 43  
Esports - 21

**Total Leads: 477**

**Total Shows: 14**

Site visits/Meet & greet:

7/10/2024 - MARS Site visit to meet with new hotel staff and tour options

8/4/2024 - Assisted Hollis Meredith, "Cruisin' With Hollis" in planning a day trip to Beaufort on 3/20/2025

12/11/2024 - Introduced Colin Chapman "TourMappers" to the historic Inns downtown via email. Met him at TSI and he disinterested in working with our inns for international visitors.

3/11/2025 - Site visit with Laura Poellman, Country Travel Discoveries to develop Gullah tour itinerary

3/15/2025 - Delivered 100 Welcome bags to Holiday Inn for Khalid Temple Inaugural Ball

3/19/2025 - Zoom call with Unique Tours planners to develop Beaufort program for spring 2026

3/22/2025 - Delivered Welcome bags and met with Allied T-Pro group from Italy at BWSII

3/26/2025 - Worked with Susie McMahon, Luxe Lowcountry Tours on Pat Conroy tour

4/8/2025 - Owens/Whitson Family reunion for 100 ppl - assisted in coordinating options for a 10/4 reunion

4/29/2025 - Worked with Susan Buskohl, Allied Tour & Travel to develop hub & some itinerary

5/12/2025 - Coordinated day-trip itinerary for PML Tours

**\*\*According to online research, there're 57 tour companies that offer from one to multi-day tours to Beaufort on their websites.**

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 24 | Applicant Presentations to TDAC, City Council Chambers                                   |
| September 30 | TDAC Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature Ashlee Houck

Date \_\_\_\_\_

**Ashlee Houck**

**Beaufort Area Hospitality Association**

**Beaufort Oyster Festival 2026**

## **Impact on Tourism**

### **a. Anticipated Attendance & Beneficiaries**

The Beaufort Oyster Festival has continued to grow each year, becoming one of the Lowcountry's most anticipated events. For the upcoming festival, we anticipate **6,000–7,000 total attendees**. Of this number, we project **2,000–3,000 visitors traveling from outside the region**, directly benefiting our local lodging, dining, and retail sectors. In addition to visitors, the festival supports local businesses, culinary partners, artists, and nonprofits, creating widespread economic and cultural benefits for the community in a typically slower month when activity is limited (January).

### **b. Anticipated Tourist Attendance (50+ miles away)**

Of the projected 3,000 visitors, we anticipate that at least **1,500 will be overnight travelers**. This segment is critical to the festival's impact, as it drives significant economic activity in lodging, restaurants, and retail establishments. Each year, we see a steady increase in overnight stays, and our goal is to continue building on this trend through targeted advertising and expanded programming that encourages longer visits.

### **c. Evaluation & Measurement of Impact**

Tourist impact is measured in partnership with **Visit Beaufort, Port Royal, and the Sea Islands Convention & Visitors Bureau (CVB)**. We utilize:

- **Geofencing technology** to track visitor origin and travel distances.
- **Demographic reporting and digital analytics** tied to advertising placements.
- **Partnership with the Lowcountry Tourism Coalition** to expand outreach and collect comparative data on regional visitor trends.

These tools allow us to quantify out-of-market attendance, overnight stays, and the overall reach of our festival.

### **d. Marketing & Promotional Plan**

Our marketing plan is designed to extend **well beyond the local market**, targeting drive-in visitors. Working closely with the CVB and the Beaufort Oyster Festival Committee, we select markets with proven visitor interest in Beaufort. Efforts include:

- **Billboards, radio, and television ads** in targeted regional markets.
- **Print placement in Southern Living** and other lifestyle publications with strong southern readership.
- **Digital campaigns** including social media advertising, search engine marketing, and geotargeted placements.
- **Collaborative campaigns with regional tourism coalitions** to amplify reach.

This marketing plan is evaluated and refined annually with our partners. By focusing on proven visitor markets and layering traditional and digital outreach, we ensure the most effective use of promotional funding. These strategies have already demonstrated strong ROI through rising attendance and overnight visitation, and will continue to position the Beaufort Oyster Festival as a signature cultural tourism event for the region.

### **Coordination and Collaboration to Leverage Impact**

#### **a. Coordination with Other Organizations, Activities, and Events**

The Beaufort Oyster Festival is intentionally designed as a **collaborative community event**, engaging partners across sectors to maximize both reach and impact. The Beaufort Area Hospitality Association (BAHA) and the Beaufort Oyster Festival Committee work closely with:

- **Nonprofits** that align with our sustainability and waterway stewardship mission, providing educational opportunities and outreach during the festival.
- **Local businesses** that participate in vendor markets, food stations, and promotions, ensuring the festival authentically represents the Beaufort community.
- **Other events and activities**, such as the **Oyster Boogie 5K** and the **Tides to Tables kick-off event**, which tie into the larger festival and extend the visitor experience.

Through these layers of collaboration, the festival not only strengthens its core mission but also creates ripple effects that benefit the broader community and economy.

#### **b. Commitments from Partners**

We have **firm commitments** in place from:

- **The Convention and Visitors Bureau (CVB)** to coordinate marketing, visitor tracking, and tourism promotions.
- **Local restaurants and hospitality businesses**, who participate in the Tides to Tables event and Oyster Festival activations.

- **Environmental and community nonprofits**, who set up displays and engage attendees in recycling, education, and stewardship activities.
- **Festival sponsors and local corporations**, who provide resources, volunteers, and financial support.

These commitments demonstrate that the Beaufort Oyster Festival is not a stand-alone event but a **collective effort built on strong partnerships**.

### **c. Alignment with DMO Sub-Brand for Tourism**

The Beaufort Oyster Festival is a natural fit within the DMO's sub-brand of **Events & Festivals**, with strong ties to **History & Culture** and **Outdoor Recreation**. The event highlights:

- **Sustainability & Waterways** – Recycling every oyster shell served, supporting the region's aquaculture and marine ecosystem.
- **Local Culture & Culinary Heritage** – Featuring Beaufort's unique seafood traditions and showcasing only local businesses, chefs, and artisans.
- **Community Celebration** – Incorporating fitness and outdoor activities like the Oyster Boogie 5K, along with cultural events like Tides to Tables, which connect directly to Beaufort's Restaurant Week.

By blending environmental sustainability, culinary authenticity, and community-driven programming, the festival reinforces Beaufort's brand as a destination that values **heritage, hospitality, and responsible tourism**.

### **Fiscal Stability and Administrative Ability**

#### **a. Organizational Structure, Operating Budget, and History**

The **Beaufort Area Hospitality Association (BAHA)** is a membership-based partnership organization that serves as the advocate and support system for Beaufort's hospitality and tourism sector. BAHA is governed by a **Board of Directors**, guided by established bylaws, and managed by a professional staff team with extensive experience in tourism, event production, and nonprofit management.

Our annual operating budget is responsibly managed with diversified revenue streams that include **membership dues, corporate sponsorships, and grants**. BAHA maintains strong financial controls and adheres to best practices in nonprofit financial management, ensuring fiscal accountability and stability.

In terms of history, BAHA has successfully executed numerous large-scale events and initiatives, including multiple **Downtown Beaufort Sip & Strolls**, the **Hospitality Star Program**, and collaborative destination marketing efforts with regional partners. The Beaufort Oyster Festival has quickly established itself as a signature event for both residents and visitors, demonstrating our ability to manage, grow, and sustain a high-quality tourism festival.

#### b. **Organizational Goals and Alignment with Mission**

BAHA's organizational goals are centered on:

- **Advocacy** – Championing policies that support the long-term success of hospitality and tourism businesses.
- **Economic Growth** – Driving visitation and visitor spending in Beaufort, particularly during slower “shoulder” months.
- **Support & Resources** – Providing tools, connections, and programs that strengthen the local industry.
- **Community Engagement** – Creating events that highlight Beaufort's culture, culinary heritage, and unique natural assets.

The Beaufort Oyster Festival aligns directly with these goals. January was identified—through data provided by the CVB—as a month of decreased visitation and economic activity. Hosting the festival during this period strategically stimulates tourism, fills hotel rooms, drives restaurant business, and generates foot traffic downtown. The oyster, a cultural and culinary icon of the region, provides a natural centerpiece that both locals and visitors can celebrate—underscoring BAHA's mission to support hospitality, showcase Beaufort's unique assets, and grow the local economy.

#### c. **Financing Project Expenses Until Reimbursement**

BAHA has a strong record of **financial responsibility** and has built reserves, sponsorship commitments, and cash flow management strategies to ensure that event expenses can be financed prior to reimbursement. Specifically, we leverage:

- **Corporate sponsorships and private funding** committed in advance of the festival.
- **Membership revenue and partner contributions** that provide upfront support.
- **Prudent budgeting practices** that allow BAHA to allocate internal funds toward pre-event expenses with confidence.

Through these mechanisms, BAHA ensures that the Beaufort Oyster Festival is fully funded, stable, and successfully executed while awaiting grant reimbursements.

## **Prior History and Success with City of Beaufort ATAX Grant Awards**

### **a. Prior ATAX Grant Awards**

The **Beaufort Oyster Festival** has received **Accommodations Tax (ATAX) grant funding from both the City of Beaufort and Beaufort County over the past five years**. These funds have been instrumental in supporting the growth and success of the festival, particularly in its early stages, by funding critical marketing, infrastructure, and visitor engagement initiatives.

While exact amounts have varied annually depending on need and award availability, ATAX funding has consistently provided the foundation to:

- Launch targeted **regional and national marketing campaigns**.
- Enhance the **visitor experience** through improved programming and logistics.
- Ensure the festival fulfills its purpose of drawing tourists, generating overnight stays, and strengthening Beaufort's economy during a shoulder season.

### **b. Successes and Challenges**

The Beaufort Oyster Festival has quickly become a **signature event in the City of Beaufort**, demonstrating measurable success in:

- **Steady attendance growth** year over year, now drawing an estimated 6,000–7,000 attendees.
- **Strong tourist impact**, with thousands of visitors traveling from outside the area, we hope to continue to fill the hotels and lodging businesses during the month of January.
- **Cultural and economic impact**, as the event highlights Beaufort's unique oyster heritage while supporting dozens of local businesses, restaurants, and nonprofits.
- **Sustainability leadership**, recycling every oyster shell served to restore local waterways and emphasizing education around environmental stewardship.

Challenges are inevitable with large-scale outdoor festivals, including **weather impacts, rising costs, and vendor capacity**. However, BAHA and the festival committee have shown resilience, adapting programming, expanding partnerships, and diversifying funding to ensure the festival's continued success.

The **return on investment** for ATAX funding has been clear: the Beaufort Oyster Festival not only attracts visitors but also generates measurable economic activity, enhances Beaufort’s cultural identity, and strengthens the city’s position as a premier coastal destination.

*The **Beaufort Oyster Festival** has quickly grown into a signature event that celebrates our community’s heritage, sustains our waterways, and drives meaningful economic impact for the City of Beaufort and the county. With steady attendance growth, increasing overnight visitation, and a proven record of collaboration with local businesses, nonprofits, and regional tourism partners, the festival demonstrates both cultural value and measurable return on investment.*

*Through strategic marketing, responsible financial stewardship, and an unwavering commitment to showcasing Beaufort’s authentic culinary and coastal traditions, the Beaufort Area Hospitality Association ensures this festival not only succeeds but continues to expand its reach year after year. While challenges such as rising costs and weather remain, our organization has the capacity, experience, and partnerships to adapt and thrive.*

*In closing, the **support of the City of Beaufort’s ATAX grant funding is vital** to sustaining this momentum. With your partnership, we will continue to grow the Beaufort Oyster Festival into a premier destination event—one that attracts visitors from across the region, fills our hotels and restaurants, highlights the unique character of Beaufort, and leaves a lasting economic and cultural impact on our community.*

**CITY OF BEAUFORT ATAX FINANCIAL REPORT**

*BAHA - Oyster Festival, Tides to Tables & Kickoff Event, Oyster Boogie, Cornhole Tournament*

|   | <b>Previous Year: Submit with Application (applies to previous year award recipients)</b> | <b>Projected: Submit with Application</b> | <b>Actual: Submit with Final Report</b> |
|---|---|---|---|
| <b>Revenues</b>   |   |   |   |
| Admission Receipts  | \$71,672.00   | <b>\$75,000</b>                           |   |
| Private Donations   | \$15,000.00   | \$15,000                                  |   |
| City of Beaufort ATAX Request                             | \$18,000.00   | \$30,000                                  |   |
| Beaufort County ATAX Request                              | \$30,000.00   | \$50,000                                  |   |
| Hilton Head ATAX Request                                  | \$ -  | \$ -                                      |   |
| Town of Bluffton ATAX Request                             | \$ -  | \$ -                                      |   |
| Other ATAX Requests                                       | \$ -  | \$ -                                      |   |
| Other revenues Oyster Boogie - Cornhole events            | \$10,155.00   | \$12,000                                  |   |
| <b>Total Revenues</b>                                     | <b>\$ 144,827.00</b>  | <b>\$ 182,000.00</b>                      | <b>\$ -</b>                             |
| <b>Projected Expenses</b>                                 |   |   |   |
| <b>Development of Event or Project</b>                    |   |   |   |
| (describe)  |   |   |   |
| (describe)  |   |   |   |
| (describe)  |   |   |   |
| (describe)  |   |   |   |
| <b>Total</b>  | <b>\$ -</b>   | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Promotional Activities</b>                             |   |   |   |
| Website   |   |   |   |
| Podcast   |   |   |   |
| Other (describe)  |   |   |   |
| <b>Total</b>  | <b>\$ -</b>   | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Advertising</b>  | \$17,387.00   |   |   |
| Print   | \$ 1,100.00   | \$ 2,000.00                               |   |
| Magazine  | \$ 3,163.00   | \$ 5,000.00                               |   |
| Radio   | \$ 1,700.00   | \$ 2,000.00                               |   |
| Television  | \$ 6,924.00   | \$ 7,000.00                               |   |
| Billboard   | \$ -  | \$ 5,000.00                               |   |
| Other (describe) social media + Photography + influencers | \$ 4,500.00   | \$ 10,000.00                              |   |
| <b>Total</b>  | <b>\$ 17,387.00</b>   | <b>\$ 31,000.00</b>                       | <b>\$ -</b>                             |
| <b>Other Eligible Expenses</b>                            | \$ 126,916.04   | \$ 135,000.00                             |   |
| Police & Emergency  | \$4,653.05  | \$ 6,000.00                               |   |
| Rentals + Service Providers                               | \$70,391.80   | \$ 85,000.00                              |   |
| Food & Beverage Fees                                      | \$51,871.19   | \$ 60,000.00                              |   |
| (describe)  |   |   |   |
| <b>Total</b>  | <b>\$ 126,916.04</b>  | <b>\$ 151,000.00</b>                      | <b>\$ -</b>                             |
| <b>Total Expenses</b>                                     | <b>\$ 144,303.04</b>  | <b>\$ 182,000.00</b>                      | <b>\$ -</b>                             |
| <b>Net profit/Loss</b>                                    | <b>\$ 523.96</b>  | <b>\$ -</b>                               | <b>\$ -</b>                             |
| <b>Award Amount</b>                                       | <b>\$18,000</b>   | <b>TBD</b>                                |   |

**2026 Preliminary Budget BEAUFORT OYSTER FEST - Tides to Tables, Oyster Boogie 5k, Tides to Tables Culinary Event, Cornho**

| Income                         |  |        |                    |         |        |                       |
|--------------------------------|--|--------|--------------------|---------|--------|-----------------------|
| Food & Beverage - Merch        |  | \$     | 75,000.00          |         |        |                       |
| Vendor Entry Fees: Food        |  | \$     | 3,000.00           |         |        |                       |
| 5k Run entry                   |  | \$     | 7,000.00           |         |        |                       |
| Cornhole Entry                 |  | \$     | 2,000.00           |         |        |                       |
| Sponsorships                   |  | \$     | 15,000.00          |         |        |                       |
| A-Tax County Local             |  | \$     | -                  |         |        | NOT BEING DISTRIBUTED |
| A-Tax City of Beaufort         |  | \$     | 30,000.00          |         |        |                       |
| A-Tax County State             |  | \$     | 50,000.00          |         |        |                       |
| <b>TOTAL INCOME</b>            |  |        | <b>\$182,000</b>   | \$ -    | \$ -   |                       |
| EXPENSES                       |  |        |                    |         |        |                       |
| Marketing and Promotional Fees |  | BUDGET | DEPOSIT            | BALANCE | VENDOR | NOTES                 |
| Social Media                   |  | \$     | (6,000.00)         | \$ -    | \$ -   |                       |
| Influencers                    |  | \$     | (1,000.00)         | \$ -    | \$ -   |                       |
| Billboards                     |  | \$     | (5,000.00)         | \$ -    | \$ -   |                       |
| Radio                          |  | \$     | (2,000.00)         | \$ -    | \$ -   | Radio                 |
| Media                          |  | \$     | (7,000.00)         | \$ -    | \$ -   | WTOC                  |
| Print Ads - Paper              |  | \$     | (2,000.00)         | \$ -    | \$ -   | Post Cour - LowCo     |
| Print                          |  | \$     | (1,100.00)         | \$ -    | \$ -   | B Lifestyle           |
| Photography                    |  | \$     | (1,900.00)         | \$ -    | \$ -   | SK Signs Designs      |
| Magazine                       |  | \$     | (5,000.00)         | \$ -    | \$ -   |                       |
| <b>Subtotal</b>                |  | \$     | <b>(31,000.00)</b> |         |        |                       |
| Print Goods                    |  |        |                    |         |        |                       |
| Signage                        |  | \$     | (487.61)           | \$ -    | \$ -   | Banners               |
| Tickets                        |  | \$     | (955.51)           | \$ -    | \$ -   |                       |
| <b>Subtotal</b>                |  | \$     | <b>(1,443.12)</b>  |         |        |                       |
| Service Providers              |  |        |                    |         |        |                       |
| Insurance                      |  | \$     | (1,244.00)         | \$ -    | \$ -   |                       |
| Portalets & Trash              |  |        |                    | \$ -    | \$ -   |                       |
| Entertainment                  |  | \$     | (5,000.00)         | \$ -    | \$ -   |                       |
| <b>Subtotal</b>                |  | \$     | <b>(6,244.00)</b>  |         |        |                       |
| Fees                           |  |        |                    |         |        |                       |
| ABL - SLED                     |  | \$     | (450.00)           | \$ -    | \$ -   |                       |
| Event Rentals                  |  | \$     | (15,000.00)        | \$ -    | \$ -   | Amazing Events        |

|                                 |  |  |                        |             |             |                         |                             |
|---------------------------------|--|--|------------------------|-------------|-------------|-------------------------|-----------------------------|
|                                 | Nonprofit 5k Assistance                  |  | \$ (2,000.00)          | \$ -        | \$ -        | TBD                     |                             |
|                                 | Administrative Fees                      |  | \$ (15,000.00)         | \$ -        | \$ -        | Event Management        |                             |
|                                 | <b>Subtotal</b>                          |  | <b>\$ (32,450.00)</b>  |             |             |                         |                             |
| <b>Food &amp; Beverage Fees</b> |  |  |                        |             |             |                         |                             |
|                                 | Pepsi                                    |  | \$ (1,000.00)          | \$ -        | \$ -        |                         |                             |
|                                 | Beverage Purchase                        |  | \$ (6,000.00)          |             |             | Beer                    |                             |
|                                 | Oysters                                  |  | \$ (7,000.00)          |             |             | Braden Farms            |                             |
|                                 | Wine & Champagne                         |  | \$ (3,500.00)          |             |             |                         |                             |
|                                 | Food Vendor fees                         |  | \$ (42,500.00)         | \$ -        | \$ -        |                         |                             |
|                                 | <b>Subtotal</b>                          |  | <b>\$ (60,000.00)</b>  |             |             |                         |                             |
| <b>Misc Fees</b>                |  |  |                        |             |             |                         |                             |
|                                 | EMS (Safety)                             |  | \$ (1,500.00)          | TBD         | \$ -        | City of Beaufort        | Paramedics/Security on site |
|                                 | Beaufort Police                          |  | \$ (3,500.00)          |             |             | City of Beaufort        |                             |
|                                 | Sherriffs Office 5k Run                  |  | \$ (400.00)            |             |             | Sherriffs               |                             |
|                                 | Coastal Security                         |  | \$ (1,000.00)          |             |             |                         | Overnight Security          |
|                                 | Ground Running 5K management             |  | \$ (1,295.00)          |             |             |                         | Tim Waz                     |
|                                 | Brian Perkins - CornHole Tournament Mgmt |  | \$ (400.00)            |             |             |                         |                             |
|                                 | Ice                                      |  | \$ (500.00)            |             |             |                         | Scoreholio                  |
|                                 | Cornhole Tournament Prizes               |  | \$ (600.00)            |             |             |                         |                             |
|                                 | 5K Run Prizes                            |  | \$ (450.00)            |             |             |                         |                             |
|                                 | 5k Medals                                |  | \$ (1,140.00)          |             |             |                         |                             |
|                                 | Wine Tumblers                            |  | \$ (600.00)            |             |             |                         |                             |
|                                 | Shirts Volunteer / Running / Merch       |  | \$ (5,000.00)          | \$ -        | \$ -        |                         |                             |
|                                 | Supplies                                 |  | \$ (2,000.00)          |             |             | Pans/Towels/Shucker Etc |                             |
|                                 | Beaufort City Parking Spots              |  | \$ (1,000.00)          |             |             |                         |                             |
|                                 | Volunteer Food                           |  | \$ (300.00)            | \$ -        | \$ -        |                         |                             |
|                                 | Sound for Entertainment & Lighting       |  | \$ (10,000.00)         |             |             |                         |                             |
|                                 | VIP Event                                |  | \$ (15,000.00)         | \$ -        | \$ -        |                         |                             |
|                                 | <b>Subtotal</b>                          |  | <b>\$ (44,685.00)</b>  |             |             |                         |                             |
| <b>Ticket Loss</b>              |  |  |                        |             |             |                         |                             |
|                                 | Comp & In-Kind Tickets                   |  | \$ (7,000.00)          | \$ -        | \$ -        |                         |                             |
|                                 | <b>Subtotal</b>                          |  | <b>\$ (7,000.00)</b>   |             |             |                         |                             |
|                                 | <b>TOTAL EXPENSE</b>                     |  | <b>\$ (181,379.00)</b> | <b>\$ -</b> | <b>\$ -</b> |                         |                             |
|                                 | <b>FINAL PROFIT</b>                      |  | <b>\$ 621.00</b>       |             |             |                         |                             |





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 Film Society
2. Mailing Address: PO Box 998, City Beaufort, State SC, Postal Code 29901
3. Project Director: Ron Tucker
Project Treasurer or Administrative Official: Ron Tucker
Telephone: 843-986-4770, Email: beaufortfilm@gmail.com
4. Event or Project Name: 2026 Beaufort International Film Festival

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

2025: \$15000

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

2019: \$10000

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

Beaufort County ATAX Amount to be requested: \$60000

- 5. Dates you will begin and complete work on your event or project: Begin - Month/Year Feb 26, End - Month/Year Feb 26

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

6. Applicant Category (check all that apply)

- [checked] on-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): 27-1020602

8. Total Estimated Costs of the Proposed Event or Project: \$ 234000

Accommodation Tax Funds Requested: \$ 15000

Project Funding from Other Sources: \$ 60000

9. Source of Applicant's Other Funds: Sponsors, Fundraisers, Ticket Sales

10. What is the anticipated total attendance for your event? 13000

Total "tourist" anticipated? 6000

11. All applicants must make a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:  
Greater Beaufort/Port Royal CVB

**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 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 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.

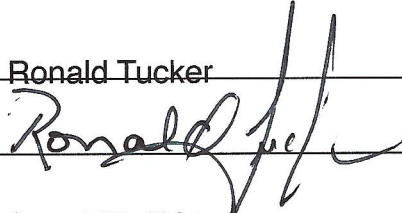
E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

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.**

I Ronald Tucker have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on August 18, 2025 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name Ronald Tucker  
Signature   
Date August 22, 2025

## 2025/2026 ACCOMMODATION TAX GRANT APPLICATION – Budget

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

### Revenue Projected

|                             |              |
|-----------------------------|--------------|
| <b>Beaufort County ATAX</b> | <b>60000</b> |
| <b>Beaufort City ATAX</b>   | <b>15000</b> |
| <b>Sponsors/BarterTrade</b> | <b>60000</b> |
| <b>Sponsors (Actual)</b>    | <b>20000</b> |
| <b>Film Submission Fees</b> | <b>10000</b> |
| <b>Fundraising</b>          | <b>2000</b>  |
| <b>Ticket Sales</b>         | <b>67000</b> |

**Total Projected Income** **234000**

### Expenses Projected

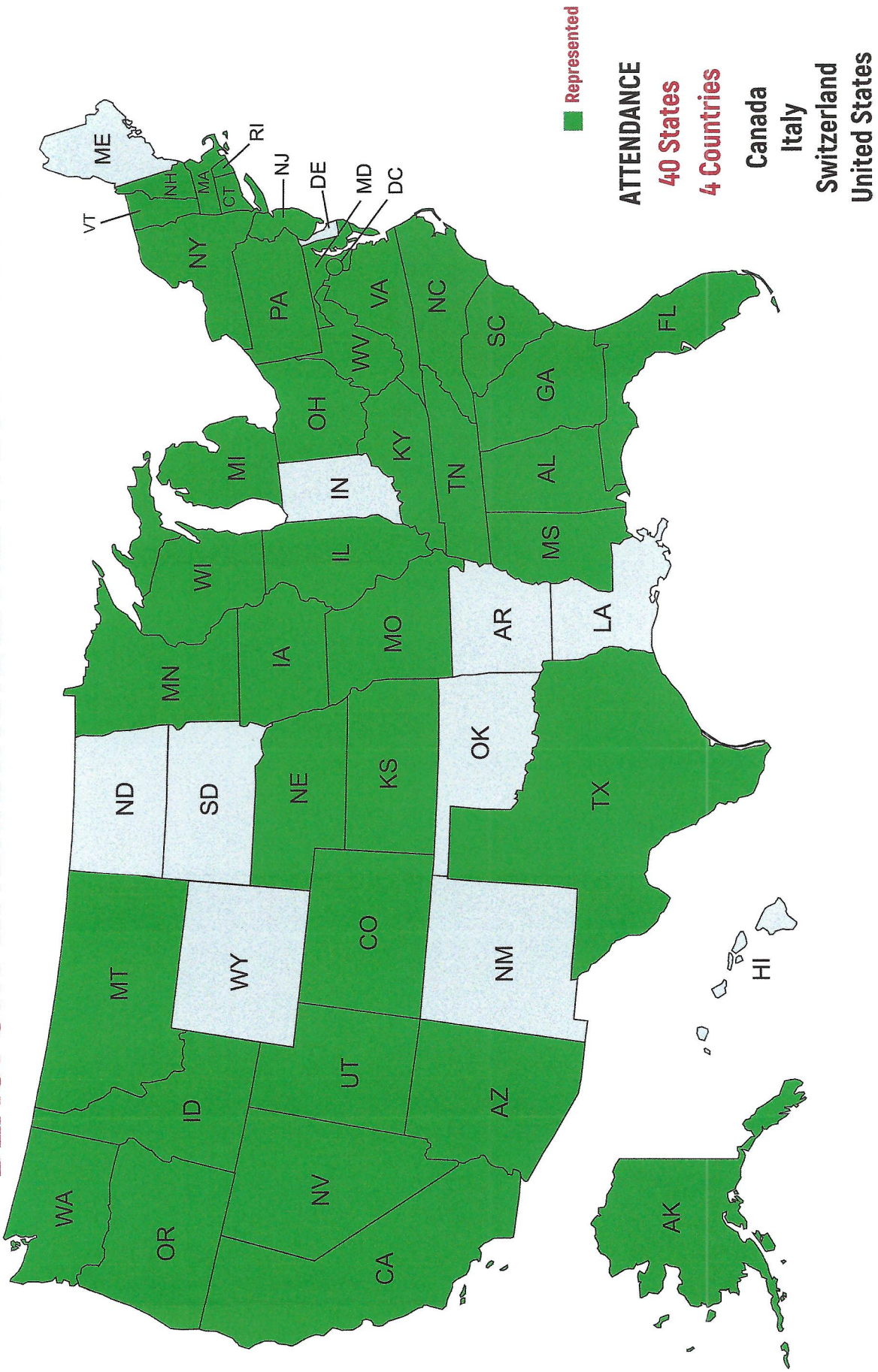
|   |              |
|---|--------------|
| <b>Sponsor/BarterTrade</b>              | <b>60000</b> |
| <b>Sponsor Tickets</b>                  | <b>20000</b> |
| <b>Advertising</b>                      | <b>7200</b>  |
| <b>Social Media</b>                     |              |
| <b>Regional Publications</b>            |              |
| <b>Regional Media/TV/Radio</b>          |              |
| <b>Videography Services</b>             | <b>5000</b>  |
| <b>Photography Services</b>             | <b>4000</b>  |
| <b>Marketing/PR/Management Services</b> | <b>31500</b> |
| <b>Facilities &amp; Equipment</b>       | <b>36500</b> |
| <b>Amazing Rentals</b>                  |              |
| <b>Capital A (AV Service)</b>           |              |
| <b>JLK Lighting/Equipment</b>           |              |
| <b>Fancy Plants/Decoration</b>          |              |
| <b>Sound Engineer</b>                   |              |
| <b>S&amp;K Social Media Streaming</b>   |              |
| <b>Venue Rental (USCB)</b>              | <b>12000</b> |
| <b>Catering/Concessions</b>             | <b>15000</b> |
| <b>Insurance</b>                        | <b>2200</b>  |
| <b>Postage/Shipping</b>                 | <b>500</b>   |
| <b>Printing/Copying</b>                 | <b>4700</b>  |
| <b>Processing Fees</b>                  | <b>4900</b>  |
| <b>Subscriptions/Licensing</b>          | <b>2000</b>  |
| <b>Supplies</b>                         | <b>9000</b>  |
| <b>Celebrity Travel</b>                 | <b>7500</b>  |
| <b>Opening Ceremony Entertainment</b>   | <b>12000</b> |

**Total Expenses** **234000**

**Event Profit/Loss** **0**

**Request for ATAX Grant** **15,000**

# BEAUFORT INTERNATIONAL FILM FESTIVAL 2025



# 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.

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## 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. BIFF places a spotlight on Beaufort's unique cinematic and natural charm and often sparks meaningful dialogue and drives community action. In 2007, festival attendance was around 500 and in 2025 the festival attendance was estimated at over 13,000 people enjoying some part of our 6 day festival. More than 100 filmmakers from around the world were in attendance.

February 17 Opening Night Reception

February 18 -21 : Screenings and Workshops (Screenings at the University of South Carolina, Beaufort Center for the Arts.

February 22: Awards Reception

### Event Summary

The 20<sup>h</sup> annual Beaufort International Film Festival will take place February 17 – 22, 2026. 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** see attached

### Tourism

In 2025 we completed a 100% tally of zip codes for attendees. Attendees included visitors from 40 states, and 4 countries.

Note: The total estimated attendance in 2025 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.

## **TOURISM contd.**

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 formidable economic stimulator. All of our planned and sometimes unplanned expenditures are contributing to the overall goal of drawing interest and visitation to the Lowcountry. It's a build it, then they will come effort.

As the film festival has grown through the years into an event of regional and national prominence, we've seen a growing interest from travel and entertainment writers who want to tell the BIFF story. Most recently we've seen interest from Southern Living, Garden & Gun Magazines and many digital social media promoters. With our 20<sup>th</sup> anniversary event on the horizon, we're anticipating even more promotion coming as a result of our own internal social media promotions.

Filmmakers attending the festival become our biggest promoters. Their reviews generate interest from other filmmakers and the 'word of mouth' promotion by them at other film festivals is priceless.

Here are a few of the more recent reviews posted on FilmFreeway:

This was a great fest with clear communication and an inspiring lineup of films. They put a lot of effort into highlighting their filmmakers with Q&As and social media interviews, and giving filmmakers a chance to network. Everybody was incredibly friendly and the town is genuinely charming and worth exploring on its own. This is a fest I plan to attend regularly in the future, whether I have film showing or not.

Beyond the screenings, BIFF offers an experience that goes far beyond just showcasing films. The events, panels, and networking opportunities are incredibly well-curated, fostering genuine connections among filmmakers, industry professionals, and the warm, welcoming town of Beaufort itself. It's the perfect blend of prestige and intimacy, where you feel both celebrated and at home.

What an amazing week! Ron and Rebecca are joined by the entire community of Beaufort, SC to make this festival the gem that it is. One viewing screen that seats 500, 12 hrs of films each day, Q&A's after each film, filmmaker gatherings and events with the greater community --all allowing me and my team to connect with the audience, other artists and filmmakers, and the art-loving members of the Beaufort community. I walked away with a wealth of knowledge, network and new friends. It is also important to note that BIFF offers housing for filmmakers -- this made it possible for filmmakers to be present for one another and create what is clearly a beautiful, unique and supportive family of BIFF Alumni.

MORE REVIEWS ARE AVAILABLE AT  
<https://filmfreeway.com/BeaufortInternationalFilmFestival>

**FUNDS REQUESTED WILL BE USED AS FOLLOWS:**

**Facilities & Equipment Rental (\$20000) \$10000 applied at 50/50**

**Venue Rental (\$12000) \$6000 applied at 50/50**

**Total (\$30000 of the \$32000) \$15000 applied at 50/50**

**Total Reimbursement Request: \$15000**

## BIFF Expenses by Vendor Detail April 2024 through March 2025

| Type                         | Date      | Num | Memo             | Account                 | Clr | Split | Amount    |
|------------------------------|-----------|-----|------------------|-------------------------|-----|-------|-----------|
| <b>11th St. Fish Camp</b>    |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     | Sponsor App...   | Travel and Meetings     |     | BIFF  | 270.00    |
| Total 11th St. Fish Camp     |           |     |                  |                         |     |       | 270.00    |
| <b>AC Limo Service</b>       |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Celebrity Travel        |     | BIFF  | 203.00    |
| Check                        | 3/31/2025 |     |                  | Celebrity Travel        |     | BIFF  | 168.00    |
| Total AC Limo Service        |           |     |                  |                         |     |       | 371.00    |
| <b>Amazing Event Rentals</b> |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Amazing Event Ren...    |     | BIFF  | 615.12    |
| Check                        | 3/31/2025 |     |                  | Amazing Event Ren...    |     | BIFF  | 21,143.94 |
| Total Amazing Event Rentals  |           |     |                  |                         |     |       | 21,759.06 |
| <b>Ashley Rhodes Events</b>  |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Event Design/Mana...    |     | BIFF  | 2,250.00  |
| Check                        | 3/31/2025 |     |                  | Event Design/Mana...    |     | BIFF  | 2,250.00  |
| Check                        | 3/31/2025 |     |                  | Event Design/Mana...    |     | BIFF  | 373.82    |
| Check                        | 3/31/2025 |     |                  | Event Design/Mana...    |     | BIFF  | 162.35    |
| Total Ashley Rhodes Events   |           |     |                  |                         |     |       | 5,036.17  |
| <b>Avangate</b>              |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Subscriptions, Lice...  |     | BIFF  | 120.00    |
| Total Avangate               |           |     |                  |                         |     |       | 120.00    |
| <b>Beaufort Symphony</b>     |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Entertainment           |     | BIFF  | 5,000.00  |
| Total Beaufort Symphony      |           |     |                  |                         |     |       | 5,000.00  |
| <b>Booking.com</b>           |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     | Celebrity Tra... | Travel                  |     | BIFF  | 3,258.00  |
| Total Booking.com            |           |     |                  |                         |     |       | 3,258.00  |
| <b>Breakwater</b>            |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     | Sponsor App...   | Travel and Meetings     |     | BIFF  | 133.00    |
| Total Breakwater             |           |     |                  |                         |     |       | 133.00    |
| <b>Capital A Productions</b> |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     | DEPOSIT          | A/V Technical Supp...   |     | BIFF  | 3,519.05  |
| Check                        | 3/31/2025 |     |                  | A/V Technical Supp...   |     | BIFF  | 3,519.04  |
| Total Capital A Productions  |           |     |                  |                         |     |       | 7,038.09  |
| <b>Center for the Arts</b>   |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Venue - USCB CFA        |     | BIFF  | 10,000.00 |
| Total Center for the Arts    |           |     |                  |                         |     |       | 10,000.00 |
| <b>Cluster Shuck</b>         |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Entertainment           |     | BIFF  | 600.00    |
| Total Cluster Shuck          |           |     |                  |                         |     |       | 600.00    |
| <b>Constant Contact</b>      |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Constant Contact        |     | BIFF  | 856.00    |
| Total Constant Contact       |           |     |                  |                         |     |       | 856.00    |
| <b>DipJar</b>                |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Facilities and Equip... |     | BIFF  | 149.00    |
| Total DipJar                 |           |     |                  |                         |     |       | 149.00    |
| <b>Discount Mugs</b>         |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Supplies                |     | BIFF  | 1,038.44  |
| Total Discount Mugs          |           |     |                  |                         |     |       | 1,038.44  |
| <b>Drop Box</b>              |           |     |                  |                         |     |       |           |
| Check                        | 3/31/2025 |     |                  | Subscriptions, Lice...  |     | BIFF  | 405.00    |
| Total Drop Box               |           |     |                  |                         |     |       | 405.00    |

## BIFF Expenses by Vendor Detail April 2024 through March 2025

| Type                                      | Date      | Num | Memo             | Account                   | Clr | Split | Amount   |
|---|-----------|-----|------------------|---------------------------|-----|-------|----------|
| <b>Eventbrite</b>                         |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Processing Fees - ...     |     | BIFF  | 483.78   |
| Check                                     | 3/31/2025 |     |                  | Processing Fees - ...     |     | BIFF  | 7,240.00 |
| Total Eventbrite                          |           |     |                  |                           |     |       | 7,723.78 |
| <b>Fancy Plants</b>                       |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Fancy Plants              |     | BIFF  | 1,273.20 |
| Total Fancy Plants                        |           |     |                  |                           |     |       | 1,273.20 |
| <b>Figaro</b>                             |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     | Movie Premi...   | Travel and Meetings       |     | BIFF  | 185.00   |
| Total Figaro                              |           |     |                  |                           |     |       | 185.00   |
| <b>FilmFreeway</b>                        |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Processing Fees - ...     |     | BIFF  | 692.16   |
| Total FilmFreeway                         |           |     |                  |                           |     |       | 692.16   |
| <b>Fine Awards</b>                        |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Supplies                  |     | BIFF  | 91.39    |
| Check                                     | 3/31/2025 |     | partial          | Supplies                  |     | BIFF  | 1,688.57 |
| Check                                     | 3/31/2025 |     |                  | Supplies                  |     | BIFF  | 968.68   |
| Check                                     | 3/31/2025 |     |                  | Supplies                  |     | BIFF  | 291.05   |
| Total Fine Awards                         |           |     |                  |                           |     |       | 3,039.69 |
| <b>Fiverr</b>                             |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     | Graphic Desi...  | Graphic Design            |     | BIFF  | 160.00   |
| Total Fiverr                              |           |     |                  |                           |     |       | 160.00   |
| <b>Golden Ticket Charity Donations</b>    |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     | Saltus           | Other Costs               |     | BIFF  | 600.00   |
| Check                                     | 3/31/2025 |     | Woodruff Hig...  | Other Costs               |     | BIFF  | 600.00   |
| Check                                     | 3/31/2025 |     | Technical Col... | Other Costs               |     | BIFF  | 600.00   |
| Check                                     | 3/31/2025 |     | St. Peters Ba... | Other Costs               |     | BIFF  | 600.00   |
| Check                                     | 3/31/2025 |     | Palmetto Ani...  | Other Costs               |     | BIFF  | 600.00   |
| Check                                     | 3/31/2025 |     | Rotary           | Other Costs               |     | BIFF  | 600.00   |
| Check                                     | 3/31/2025 |     | CAPA             | Other Costs               |     | BIFF  | 600.00   |
| Total Golden Ticket Charity Donations     |           |     |                  |                           |     |       | 4,200.00 |
| <b>Hearth</b>                             |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     | Volunteer Ap...  | Travel and Meetings       |     | BIFF  | 280.00   |
| Total Hearth                              |           |     |                  |                           |     |       | 280.00   |
| <b>JLK Lighting Servies</b>               |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Decorative Lighting ...   |     | BIFF  | 5,150.00 |
| Check                                     | 3/31/2025 |     |                  | Decorative Lighting ...   |     | BIFF  | 400.00   |
| Total JLK Lighting Servies                |           |     |                  |                           |     |       | 5,550.00 |
| <b>Johnson Johnson Insurance Services</b> |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Insurance - Liability,... |     | BIFF  | 2,490.00 |
| Total Johnson Johnson Insurance Services  |           |     |                  |                           |     |       | 2,490.00 |
| <b>JotForm</b>                            |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Subscriptions, Lice...    |     | BIFF  | 348.00   |
| Total JotForm                             |           |     |                  |                           |     |       | 348.00   |
| <b>Lanyard Factory</b>                    |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     |                  | Lanyard Factory           |     | BIFF  | 670.00   |
| Total Lanyard Factory                     |           |     |                  |                           |     |       | 670.00   |
| <b>Lowcountry Produce</b>                 |           |     |                  |                           |     |       |          |
| Check                                     | 3/31/2025 |     | Deposit          | Catering                  |     | BIFF  | 3,282.40 |
| Check                                     | 3/31/2025 |     | Final            | Catering                  |     | BIFF  | 5,662.14 |
| Check                                     | 3/31/2025 |     | Sponsor Lun...   | Travel and Meetings       |     | BIFF  | 131.00   |
| Total Lowcountry Produce                  |           |     |                  |                           |     |       | 9,075.54 |

## BIFF Expenses by Vendor Detail April 2024 through March 2025

| Type                          | Date      | Num | Memo            | Account                | Clr | Split | Amount    |
|-------------------------------|-----------|-----|-----------------|------------------------|-----|-------|-----------|
| <b>Microsoft</b>              |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Subscriptions, Lice... |     | BIFF  | 120.00    |
| Total Microsoft               |           |     |                 |                        |     |       | 120.00    |
| <b>Moonlight Productions</b>  |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Videography Services   |     | BIFF  | 3,250.00  |
| Total Moonlight Productions   |           |     |                 |                        |     |       | 3,250.00  |
| <b>Old Bull</b>               |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     | Sponsor App...  | Travel and Meetings    |     | BIFF  | 489.00    |
| Total Old Bull                |           |     |                 |                        |     |       | 489.00    |
| <b>Papaya Thai Restaurant</b> |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     | Key Voluntee... | Travel and Meetings    |     | BIFF  | 91.00     |
| Total Papaya Thai Restaurant  |           |     |                 |                        |     |       | 91.00     |
| <b>PicMonkey</b>              |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Subscriptions, Lice... |     | BIFF  | 53.00     |
| Total PicMonkey               |           |     |                 |                        |     |       | 53.00     |
| <b>Pond 5</b>                 |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Subscriptions, Lice... |     | BIFF  | 146.00    |
| Total Pond 5                  |           |     |                 |                        |     |       | 146.00    |
| <b>QR Code</b>                |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Marketing/PR/Mana...   |     | BIFF  | 236.00    |
| Total QR Code                 |           |     |                 |                        |     |       | 236.00    |
| <b>Rhett House Inn</b>        |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Catering               |     | BIFF  | 2,352.00  |
| Total Rhett House Inn         |           |     |                 |                        |     |       | 2,352.00  |
| <b>Richard Kilgore</b>        |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Outside Contract S...  |     | BIFF  | 750.00    |
| Total Richard Kilgore         |           |     |                 |                        |     |       | 750.00    |
| <b>S K Designs</b>            |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     | Facetime Live   | Videography Services   |     | BIFF  | 500.00    |
| Total S K Designs             |           |     |                 |                        |     |       | 500.00    |
| <b>Saltus</b>                 |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     | Sponsor App...  | Travel and Meetings    |     | BIFF  | 159.00    |
| Total Saltus                  |           |     |                 |                        |     |       | 159.00    |
| <b>Sandbar Media Group</b>    |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Marketing/PR/Mana...   |     | BIFF  | 9,500.00  |
| Check                         | 3/31/2025 |     |                 | Marketing/PR/Mana...   |     | BIFF  | 2,500.00  |
| Check                         | 3/31/2025 |     |                 | Marketing/PR/Mana...   |     | BIFF  | 5,500.00  |
| Check                         | 3/31/2025 |     |                 | Marketing/PR/Mana...   |     | BIFF  | 2,500.00  |
| Total Sandbar Media Group     |           |     |                 |                        |     |       | 20,000.00 |
| <b>Sign Up Genius</b>         |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Subscriptions, Lice... |     | BIFF  | 120.00    |
| Total Sign Up Genius          |           |     |                 |                        |     |       | 120.00    |
| <b>Skinny Lizard</b>          |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     | Deposit         | Supplies               |     | BIFF  | 700.00    |
| Check                         | 3/31/2025 |     |                 | Supplies               |     | BIFF  | 700.00    |
| Total Skinny Lizard           |           |     |                 |                        |     |       | 1,400.00  |
| <b>Sponsors (In Kind)</b>     |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Barter/Trade           |     | BIFF  | 51,500.00 |
| Total Sponsors (In Kind)      |           |     |                 |                        |     |       | 51,500.00 |
| <b>Square Processing Fee</b>  |           |     |                 |                        |     |       |           |
| Check                         | 3/31/2025 |     |                 | Processing Fees - ...  |     | BIFF  | 221.00    |
| Total Square Processing Fee   |           |     |                 |                        |     |       | 221.00    |

**BIFF**  
**Expenses by Vendor Detail**  
 April 2024 through March 2025

| Type                             | Date      | Num | Memo           | Account                 | Clr | Split | Amount            |
|----------------------------------|-----------|-----|----------------|-------------------------|-----|-------|-------------------|
| <b>Staples</b>                   |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Supplies                |     | BIFF  | 168.00            |
| Total Staples                    |           |     |                |                         |     |       | 168.00            |
| <b>stripe</b>                    |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Facilities and Equip... |     | BIFF  | 280.34            |
| Total stripe                     |           |     |                |                         |     |       | 280.34            |
| <b>Stripe Processing Fee</b>     |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Processing Fees St...   |     | BIFF  | 221.47            |
| Total Stripe Processing Fee      |           |     |                |                         |     |       | 221.47            |
| <b>sunbelt</b>                   |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     | Heaters        | Equip Rental and M...   |     | BIFF  | 2,576.01          |
| Total sunbelt                    |           |     |                |                         |     |       | 2,576.01          |
| <b>Susan Deloach Photography</b> |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Photography Services    |     | BIFF  | 3,000.00          |
| Total Susan Deloach Photography  |           |     |                |                         |     |       | 3,000.00          |
| <b>TJM Promotions</b>            |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     | Filmmaker B... | Supplies                |     | BIFF  | 438.18            |
| Total TJM Promotions             |           |     |                |                         |     |       | 438.18            |
| <b>USCB Catering/Aramark</b>     |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     | Deposit        | Catering                |     | BIFF  | 3,500.00          |
| Check                            | 3/31/2025 |     |                | Catering                |     | BIFF  | 3,045.94          |
| Total USCB Catering/Aramark      |           |     |                |                         |     |       | 6,545.94          |
| <b>USPS</b>                      |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Postage, Mailing Se...  |     | BIFF  | 266.00            |
| Total USPS                       |           |     |                |                         |     |       | 266.00            |
| <b>Vimeo</b>                     |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Vimeo Pro               |     | BIFF  | 152.00            |
| Total Vimeo                      |           |     |                |                         |     |       | 152.00            |
| <b>VistaPrint</b>                |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Vista Print             |     | BIFF  | 40.00             |
| Total VistaPrint                 |           |     |                |                         |     |       | 40.00             |
| <b>Wes Tinsley Pro Audio</b>     |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | A/V Technical Supp...   |     | BIFF  | 2,432.00          |
| Total Wes Tinsley Pro Audio      |           |     |                |                         |     |       | 2,432.00          |
| <b>WHHI</b>                      |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Advertising             |     | BIFF  | 700.00            |
| Total WHHI                       |           |     |                |                         |     |       | 700.00            |
| <b>WIX</b>                       |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     | Website        | Subscriptions, Lice...  |     | BIFF  | 616.00            |
| Total WIX                        |           |     |                |                         |     |       | 616.00            |
| <b>Wren</b>                      |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     | Filmmaker C... | Travel and Meetings     |     | BIFF  | 234.00            |
| Total Wren                       |           |     |                |                         |     |       | 234.00            |
| <b>Zoom</b>                      |           |     |                |                         |     |       |                   |
| Check                            | 3/31/2025 |     |                | Subscriptions, Lice...  |     | BIFF  | 204.00            |
| Total Zoom                       |           |     |                |                         |     |       | 204.00            |
| <b>TOTAL</b>                     |           |     |                |                         |     |       | <b>190,982.07</b> |

**BIFF**  
**Profit Loss Detail**  
 April 2024 through March 2025

| Type                                  | Date      | Num | Name                  | Memo    | Clr | Split | Amount     |
|---------------------------------------|-----------|-----|-----------------------|---------|-----|-------|------------|
| <b>Ordinary Income/Expense</b>        |           |     |                       |         |     |       |            |
| <b>Income</b>                         |           |     |                       |         |     |       |            |
| <b>Direct Public Support</b>          |           |     |                       |         |     |       |            |
| <b>ATax Grant - County</b>            |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       | Deposit |     | BIFF  | 60,000.00  |
| Total ATax Grant - County             |           |     |                       |         |     |       | 60,000.00  |
| Total Direct Public Support           |           |     |                       |         |     |       | 60,000.00  |
| <b>Other Types of Income</b>          |           |     |                       |         |     |       |            |
| <b>Barter/Trade</b>                   |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       | Deposit |     | BIFF  | 51,500.00  |
| Total Barter/Trade                    |           |     |                       |         |     |       | 51,500.00  |
| Total Other Types of Income           |           |     |                       |         |     |       | 51,500.00  |
| <b>Program Income</b>                 |           |     |                       |         |     |       |            |
| <b>Film Submission Fees</b>           |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       | Deposit |     | BIFF  | 11,523.00  |
| Total Film Submission Fees            |           |     |                       |         |     |       | 11,523.00  |
| <b>Fundraising</b>                    |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       |         |     | BIFF  | 1,500.00   |
| Total Fundraising                     |           |     |                       |         |     |       | 1,500.00   |
| <b>Product Sales - TShirts, Totes</b> |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       | Deposit |     | BIFF  | 2,523.00   |
| Total Product Sales - TShirts, Totes  |           |     |                       |         |     |       | 2,523.00   |
| <b>Sponsors</b>                       |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       | Deposit |     | BIFF  | 44,500.00  |
| Total Sponsors                        |           |     |                       |         |     |       | 44,500.00  |
| <b>Stripe Ticket Sales</b>            |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       | Deposit |     | BIFF  | 7,878.00   |
| Total Stripe Ticket Sales             |           |     |                       |         |     |       | 7,878.00   |
| <b>Ticket Sales - Eventbrite</b>      |           |     |                       |         |     |       |            |
| Deposit                               | 3/31/2025 |     |                       | Deposit |     | BIFF  | 73,832.00  |
| Total Ticket Sales - Eventbrite       |           |     |                       |         |     |       | 73,832.00  |
| Total Program Income                  |           |     |                       |         |     |       | 141,756.00 |
| Total Income                          |           |     |                       |         |     |       | 253,256.00 |
| <b>Expense</b>                        |           |     |                       |         |     |       |            |
| <b>Business Expenses</b>              |           |     |                       |         |     |       |            |
| <b>Barter/Trade</b>                   |           |     |                       |         |     |       |            |
| Check                                 | 3/31/2025 |     | Sponsors (In Kind)    |         |     | BIFF  | 51,500.00  |
| Total Barter/Trade                    |           |     |                       |         |     |       | 51,500.00  |
| Total Business Expenses               |           |     |                       |         |     |       | 51,500.00  |
| <b>Contract Services</b>              |           |     |                       |         |     |       |            |
| <b>A/V Technical Support Director</b> |           |     |                       |         |     |       |            |
| Check                                 | 3/31/2025 |     | Capital A Productions | DEPOSIT |     | BIFF  | 3,519.05   |
| Check                                 | 3/31/2025 |     | Wes Tinsley Pro Au... |         |     | BIFF  | 2,432.00   |
| Check                                 | 3/31/2025 |     | Capital A Productions |         |     | BIFF  | 3,519.04   |
| Total A/V Technical Support Director  |           |     |                       |         |     |       | 9,470.09   |
| <b>Catering</b>                       |           |     |                       |         |     |       |            |
| Check                                 | 3/31/2025 |     | Lowcountry Produce    | Deposit |     | BIFF  | 3,282.40   |
| Check                                 | 3/31/2025 |     | USCB Catering/Ara...  | Deposit |     | BIFF  | 3,500.00   |
| Check                                 | 3/31/2025 |     | Lowcountry Produce    | Final   |     | BIFF  | 5,662.14   |
| Check                                 | 3/31/2025 |     | USCB Catering/Ara...  |         |     | BIFF  | 3,045.94   |
| Check                                 | 3/31/2025 |     | Rhett House Inn       |         |     | BIFF  | 2,352.00   |
| Total Catering                        |           |     |                       |         |     |       | 17,842.48  |

**BIFF**  
**Profit Loss Detail**  
 April 2024 through March 2025

| Type  | Date      | Num | Name                   | Memo            | Cir | Split | Amount    |
|---|-----------|-----|------------------------|-----------------|-----|-------|-----------|
| <b>Decorative Lighting Services</b>         |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | JLK Lighting Servies   |                 |     | BIFF  | 5,150.00  |
| Check                                       | 3/31/2025 |     | JLK Lighting Servies   |                 |     | BIFF  | 400.00    |
| Total Decorative Lighting Services          |           |     |                        |                 |     |       | 5,550.00  |
| <b>Entertainment</b>                        |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Cluster Shuck          |                 |     | BIFF  | 600.00    |
| Check                                       | 3/31/2025 |     | Beaufort Symphony      |                 |     | BIFF  | 5,000.00  |
| Total Entertainment                         |           |     |                        |                 |     |       | 5,600.00  |
| <b>Event Design/Management</b>              |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Ashley Rhodes Eve...   |                 |     | BIFF  | 2,250.00  |
| Check                                       | 3/31/2025 |     | Ashley Rhodes Eve...   |                 |     | BIFF  | 2,250.00  |
| Check                                       | 3/31/2025 |     | Ashley Rhodes Eve...   |                 |     | BIFF  | 373.82    |
| Check                                       | 3/31/2025 |     | Ashley Rhodes Eve...   |                 |     | BIFF  | 162.35    |
| Total Event Design/Management               |           |     |                        |                 |     |       | 5,036.17  |
| <b>Marketing/PR/ManagementServ.</b>         |           |     |                        |                 |     |       |           |
| <b>Advertising</b>                          |           |     |                        |                 |     |       |           |
| <b>Constant Contact</b>                     |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Constant Contact       |                 |     | BIFF  | 856.00    |
| Total Constant Contact                      |           |     |                        |                 |     |       | 856.00    |
| <b>Vimeo Pro</b>                            |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Vimeo                  |                 |     | BIFF  | 152.00    |
| Total Vimeo Pro                             |           |     |                        |                 |     |       | 152.00    |
| <b>Advertising - Other</b>                  |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | WHHI                   |                 |     | BIFF  | 700.00    |
| Total Advertising - Other                   |           |     |                        |                 |     |       | 700.00    |
| Total Advertising                           |           |     |                        |                 |     |       | 1,708.00  |
| <b>Graphic Design</b>                       |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Fiverr                 | Graphic Desi... |     | BIFF  | 160.00    |
| Total Graphic Design                        |           |     |                        |                 |     |       | 160.00    |
| <b>Photography Services</b>                 |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Susan Deloach Pho...   |                 |     | BIFF  | 3,000.00  |
| Total Photography Services                  |           |     |                        |                 |     |       | 3,000.00  |
| <b>Videography Services</b>                 |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Moonlight Productio... |                 |     | BIFF  | 3,250.00  |
| Check                                       | 3/31/2025 |     | S K Designs            | Facetime Live   |     | BIFF  | 500.00    |
| Total Videography Services                  |           |     |                        |                 |     |       | 3,750.00  |
| <b>Marketing/PR/ManagementServ. - Other</b> |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Sandbar Media Group    |                 |     | BIFF  | 9,500.00  |
| Check                                       | 3/31/2025 |     | Sandbar Media Group    |                 |     | BIFF  | 2,500.00  |
| Check                                       | 3/31/2025 |     | Sandbar Media Group    |                 |     | BIFF  | 5,500.00  |
| Check                                       | 3/31/2025 |     | Sandbar Media Group    |                 |     | BIFF  | 2,500.00  |
| Check                                       | 3/31/2025 |     | QR Code                |                 |     | BIFF  | 236.00    |
| Total Marketing/PR/ManagementServ. - Other  |           |     |                        |                 |     |       | 20,236.00 |
| Total Marketing/PR/ManagementServ.          |           |     |                        |                 |     |       | 28,854.00 |
| <b>Outside Contract Services</b>            |           |     |                        |                 |     |       |           |
| Check                                       | 3/31/2025 |     | Richard Kilgore        |                 |     | BIFF  | 750.00    |
| Total Outside Contract Services             |           |     |                        |                 |     |       | 750.00    |
| Total Contract Services                     |           |     |                        |                 |     |       | 73,102.74 |

**BIFF**  
**Profit Loss Detail**  
**April 2024 through March 2025**

| Type  | Date      | Num | Name                   | Memo    | Clr | Split | Amount    |
|---|-----------|-----|------------------------|---------|-----|-------|-----------|
| <b>Facilities and Equipment</b>             |           |     |                        |         |     |       |           |
| <b>Equip Rental and Maintenance</b>         |           |     |                        |         |     |       |           |
| <b>Amazing Event Rentals</b>                |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | Amazing Event Ren...   |         |     | BIFF  | 615.12    |
| Check                                       | 3/31/2025 |     | Amazing Event Ren...   |         |     | BIFF  | 21,143.94 |
| Total Amazing Event Rentals                 |           |     |                        |         |     |       | 21,759.06 |
| <b>Fancy Plants</b>                         |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | Fancy Plants           |         |     | BIFF  | 1,273.20  |
| Total Fancy Plants                          |           |     |                        |         |     |       | 1,273.20  |
| <b>Equip Rental and Maintenance - Other</b> |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | sunbelt                | Heaters |     | BIFF  | 2,576.01  |
| Total Equip Rental and Maintenance - Other  |           |     |                        |         |     |       | 2,576.01  |
| Total Equip Rental and Maintenance          |           |     |                        |         |     |       | 25,608.27 |
| <b>Rent, Parking, Utilities</b>             |           |     |                        |         |     |       |           |
| <b>Venue - USCB CFA</b>                     |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | Center for the Arts    |         |     | BIFF  | 10,000.00 |
| Total Venue - USCB CFA                      |           |     |                        |         |     |       | 10,000.00 |
| Total Rent, Parking, Utilities              |           |     |                        |         |     |       | 10,000.00 |
| <b>Facilities and Equipment - Other</b>     |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | stripe                 |         |     | BIFF  | 280.34    |
| Check                                       | 3/31/2025 |     | DipJar                 |         |     | BIFF  | 149.00    |
| Total Facilities and Equipment - Other      |           |     |                        |         |     |       | 429.34    |
| Total Facilities and Equipment              |           |     |                        |         |     |       | 36,037.61 |
| <b>Operations</b>                           |           |     |                        |         |     |       |           |
| <b>Postage, Mailing Service</b>             |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | USPS                   |         |     | BIFF  | 266.00    |
| Total Postage, Mailing Service              |           |     |                        |         |     |       | 266.00    |
| <b>Printing and Copying</b>                 |           |     |                        |         |     |       |           |
| <b>Vista Print</b>                          |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | VistaPrint             |         |     | BIFF  | 40.00     |
| Total Vista Print                           |           |     |                        |         |     |       | 40.00     |
| Total Printing and Copying                  |           |     |                        |         |     |       | 40.00     |
| <b>Processing Fees - Eventbrite</b>         |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | Eventbrite             |         |     | BIFF  | 483.78    |
| Check                                       | 3/31/2025 |     | Eventbrite             |         |     | BIFF  | 7,240.00  |
| Total Processing Fees - Eventbrite          |           |     |                        |         |     |       | 7,723.78  |
| <b>Processing Fees - FilmFreeway</b>        |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | FilmFreeway            |         |     | BIFF  | 692.16    |
| Total Processing Fees - FilmFreeway         |           |     |                        |         |     |       | 692.16    |
| <b>Processing Fees - Square</b>             |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | Square Processing ...  |         |     | BIFF  | 221.00    |
| Total Processing Fees - Square              |           |     |                        |         |     |       | 221.00    |
| <b>Processing Fees Stripe</b>               |           |     |                        |         |     |       |           |
| Check                                       | 3/31/2025 |     | Stripe Processing F... |         |     | BIFF  | 221.47    |
| Total Processing Fees Stripe                |           |     |                        |         |     |       | 221.47    |

**BIFF**  
**Profit Loss Detail**  
**April 2024 through March 2025**

| Type                                  | Date      | Num | Name                   | Memo             | Clr | Split | Amount    |
|---------------------------------------|-----------|-----|------------------------|------------------|-----|-------|-----------|
| <b>Subscriptions, Licensing</b>       |           |     |                        |                  |     |       |           |
| Check                                 | 3/31/2025 |     | WIX                    | Website          |     | BIFF  | 616.00    |
| Check                                 | 3/31/2025 |     | Drop Box               |                  |     | BIFF  | 405.00    |
| Check                                 | 3/31/2025 |     | JotForm                |                  |     | BIFF  | 348.00    |
| Check                                 | 3/31/2025 |     | Microsoft              |                  |     | BIFF  | 120.00    |
| Check                                 | 3/31/2025 |     | PicMonkey              |                  |     | BIFF  | 53.00     |
| Check                                 | 3/31/2025 |     | Pond 5                 |                  |     | BIFF  | 146.00    |
| Check                                 | 3/31/2025 |     | Avangate               |                  |     | BIFF  | 120.00    |
| Check                                 | 3/31/2025 |     | Zoom                   |                  |     | BIFF  | 204.00    |
| Check                                 | 3/31/2025 |     | Sign Up Genius         |                  |     | BIFF  | 120.00    |
| Total Subscriptions, Licensing        |           |     |                        |                  |     |       | 2,132.00  |
| <b>Supplies</b>                       |           |     |                        |                  |     |       |           |
| <b>Lanyard Factory</b>                |           |     |                        |                  |     |       |           |
| Check                                 | 3/31/2025 |     | Lanyard Factory        |                  |     | BIFF  | 670.00    |
| Total Lanyard Factory                 |           |     |                        |                  |     |       | 670.00    |
| <b>Supplies - Other</b>               |           |     |                        |                  |     |       |           |
| Check                                 | 3/31/2025 |     | Discount Mugs          |                  |     | BIFF  | 1,038.44  |
| Check                                 | 3/31/2025 |     | Fine Awards            |                  |     | BIFF  | 91.39     |
| Check                                 | 3/31/2025 |     | TJM Promotions         | Filmmaker B...   |     | BIFF  | 438.18    |
| Check                                 | 3/31/2025 |     | Fine Awards            | partial          |     | BIFF  | 1,688.57  |
| Check                                 | 3/31/2025 |     | Skinny Lizard          | Deposit          |     | BIFF  | 700.00    |
| Check                                 | 3/31/2025 |     | Skinny Lizard          |                  |     | BIFF  | 700.00    |
| Check                                 | 3/31/2025 |     | Fine Awards            |                  |     | BIFF  | 968.68    |
| Check                                 | 3/31/2025 |     | Fine Awards            |                  |     | BIFF  | 291.05    |
| Check                                 | 3/31/2025 |     | Staples                |                  |     | BIFF  | 168.00    |
| Total Supplies - Other                |           |     |                        |                  |     |       | 6,084.31  |
| Total Supplies                        |           |     |                        |                  |     |       | 6,754.31  |
| Total Operations                      |           |     |                        |                  |     |       | 18,050.72 |
| <b>Other Types of Expenses</b>        |           |     |                        |                  |     |       |           |
| <b>Insurance - Liability, D and O</b> |           |     |                        |                  |     |       |           |
| Check                                 | 3/31/2025 |     | Johnson Johnson...     |                  |     | BIFF  | 2,490.00  |
| Total Insurance - Liability, D and O  |           |     |                        |                  |     |       | 2,490.00  |
| <b>Other Costs</b>                    |           |     |                        |                  |     |       |           |
| Check                                 | 3/31/2025 |     | Golden Ticket Chari... | Saltus           |     | BIFF  | 600.00    |
| Check                                 | 3/31/2025 |     | Golden Ticket Chari... | Woodruff Hig...  |     | BIFF  | 600.00    |
| Check                                 | 3/31/2025 |     | Golden Ticket Chari... | Technical Col... |     | BIFF  | 600.00    |
| Check                                 | 3/31/2025 |     | Golden Ticket Chari... | St. Peters Ba... |     | BIFF  | 600.00    |
| Check                                 | 3/31/2025 |     | Golden Ticket Chari... | Palmetto Ani...  |     | BIFF  | 600.00    |
| Check                                 | 3/31/2025 |     | Golden Ticket Chari... | Rotary           |     | BIFF  | 600.00    |
| Check                                 | 3/31/2025 |     | Golden Ticket Chari... | CAPA             |     | BIFF  | 600.00    |
| Total Other Costs                     |           |     |                        |                  |     |       | 4,200.00  |
| Total Other Types of Expenses         |           |     |                        |                  |     |       | 6,690.00  |
| <b>Travel and Meetings</b>            |           |     |                        |                  |     |       |           |
| <b>Travel</b>                         |           |     |                        |                  |     |       |           |
| <b>Celebrity Travel</b>               |           |     |                        |                  |     |       |           |
| Check                                 | 3/31/2025 |     | AC Limo Service        |                  |     | BIFF  | 203.00    |
| Check                                 | 3/31/2025 |     | AC Limo Service        |                  |     | BIFF  | 168.00    |
| Total Celebrity Travel                |           |     |                        |                  |     |       | 371.00    |
| <b>Travel - Other</b>                 |           |     |                        |                  |     |       |           |
| Check                                 | 3/31/2025 |     | Booking.com            | Celebrity Tra... |     | BIFF  | 3,258.00  |
| Total Travel - Other                  |           |     |                        |                  |     |       | 3,258.00  |
| Total Travel                          |           |     |                        |                  |     |       | 3,629.00  |

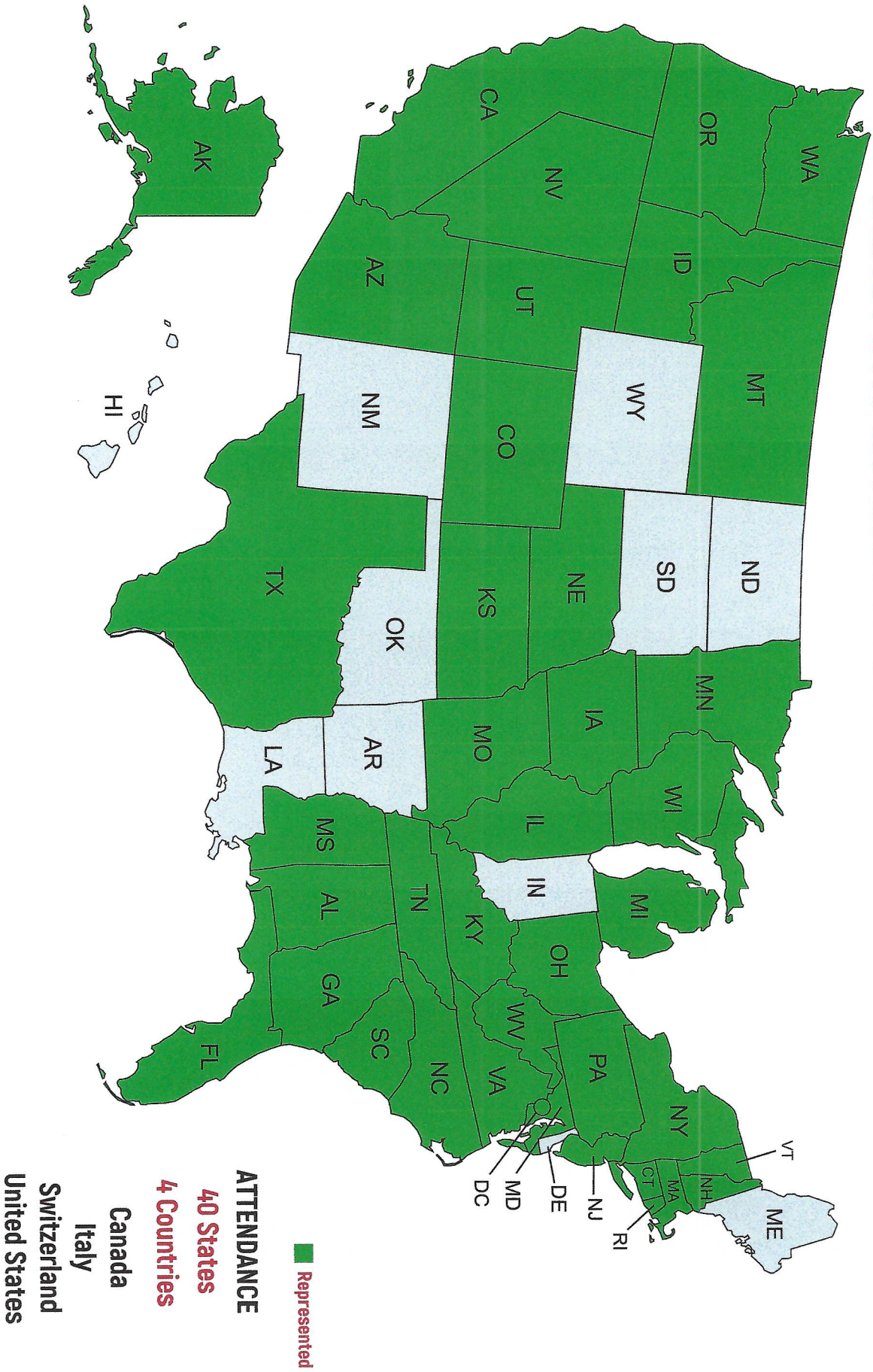
**BIFF**  
**Profit Loss Detail**  
**April 2024 through March 2025**

| Type                               | Date      | Num | Name                 | Memo            | Clr | Split | Amount           |
|------------------------------------|-----------|-----|----------------------|-----------------|-----|-------|------------------|
| <b>Travel and Meetings - Other</b> |           |     |                      |                 |     |       |                  |
| Check                              | 3/31/2025 |     | Old Bull             | Sponsor App...  |     | BIFF  | 489.00           |
| Check                              | 3/31/2025 |     | Saltus               | Sponsor App...  |     | BIFF  | 159.00           |
| Check                              | 3/31/2025 |     | Wren                 | Filmmaker C...  |     | BIFF  | 234.00           |
| Check                              | 3/31/2025 |     | Figaro               | Movie Premi...  |     | BIFF  | 185.00           |
| Check                              | 3/31/2025 |     | Breakwater           | Sponsor App...  |     | BIFF  | 133.00           |
| Check                              | 3/31/2025 |     | Lowcountry Produce   | Sponsor Lun...  |     | BIFF  | 131.00           |
| Check                              | 3/31/2025 |     | Papaya Thai Resta... | Key Voluntee... |     | BIFF  | 91.00            |
| Check                              | 3/31/2025 |     | Hearth               | Volunteer Ap... |     | BIFF  | 280.00           |
| Check                              | 3/31/2025 |     | 11th St. Fish Camp   | Sponsor App...  |     | BIFF  | 270.00           |
| Total Travel and Meetings - Other  |           |     |                      |                 |     |       | 1,972.00         |
| Total Travel and Meetings          |           |     |                      |                 |     |       | 5,601.00         |
| Total Expense                      |           |     |                      |                 |     |       | 190,982.07       |
| Net Ordinary Income                |           |     |                      |                 |     |       | 62,273.93        |
| <b>Net Income</b>                  |           |     |                      |                 |     |       | <b>62,273.93</b> |

**BIFF**  
**Balance Sheet**  
**As of June 27, 2025**

|                                 | <u>Jun 27, 25</u>       |
|---------------------------------|-------------------------|
| <b>ASSETS</b>                   |                         |
| Current Assets                  |                         |
| Checking/Savings                |                         |
| BIFF                            | 46,338 67               |
| Total Checking/Savings          | <u>46,338 67</u>        |
| Total Current Assets            | <u>46,338 67</u>        |
| <b>TOTAL ASSETS</b>             | <u><u>46,338.67</u></u> |
| <b>LIABILITIES EQUITY</b>       |                         |
| Equity                          |                         |
| Unrestricted Net Assets         | 46,338 67               |
| Total Equity                    | <u>46,338 67</u>        |
| <b>TOTAL LIABILITIES EQUITY</b> | <u><u>46,338.67</u></u> |

# BEAUFORT INTERNATIONAL FILM FESTIVAL 2025



■ Represented

**ATTENDANCE**

**40 States**

**4 Countries**

Canada

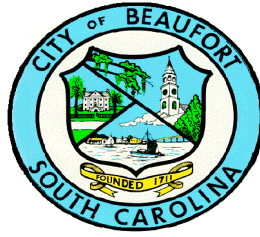
Italy

Switzerland

United States

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 24 | Applicant Presentations to TDAC, City Council Chambers                                   |
| September 30 | TDAC Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature Katherine Lang

Date \_\_\_\_\_

**CITY OF BEAUFORT ATAX FINANCIAL REPORT  
BEAUFORT HISTORY MUSEUM**

|  | <u>Previous Year: Submit with Application (applies to previous year award recipients)</u> | <u>Projected: Submit with Application</u>  | <u>Actual: Submit with Final Report</u> |
|--|---|--|---|
| <b>Revenues</b>                        |   |  |   |
| Admission Receipts                     |   |  |   |
| Private Donations                      |   |  |   |
| City of Beaufort ATAX Request          |   | \$10,000.00  |   |
| Beaufort County ATAX Request           |   |  |   |
| Hilton Head ATAX Request               |   |  |   |
| Town of Bluffton ATAX Request          |   |  |   |
| Other ATAX Requests                    |   |  |   |
| Other Revenues (describe)              |   | \$10,000.00  |   |
| <b>Total Revenues</b>                  | <b>\$-</b>  | <b>\$10,000.00</b>   | <b>\$-</b>                              |
| <b>Projected Expenses</b>              |   |  |   |
|  |   | \$10,000.00  |   |
| <b>Development of Event or Project</b> |   |  |   |
| (describe)                             |   | Timeline:  |   |
| (describe)                             |   | Sept. prelaunch tease  |   |
| (describe)                             |   | Oct. Launch  |   |
| (describe)                             |   | Nov-Dec. sustain & engage  |   |
| (describe)                             |   | Jan-Feb Final push   |   |
| <b>Total</b>                           | <b>\$-</b>  | <b>\$5,000.00</b>  | <b>\$-</b>                              |
| <b>Promotional Activities</b>          |   |  |   |
|  |   | social ads in Beaufort, Savannah, Charleston, Greenville-Spartanburg, Charlotte, Beaufort History Museum website |   |
| Website                                |   | Inner Coastal Podcast  |   |
| Podcast                                |   | Collaborations (see application)   |   |
| Other (describe)                       |   |  |   |
| <b>Total</b>                           | <b>\$-</b>  | <b>\$5,000.00</b>  | <b>\$-</b>                              |
| <b>Advertising</b>                     |   |  |   |
| Print                                  |   | press releases to local & regional print media   |   |
| Magazine                               |   | Southern Living, Garden & Gun  |   |
| Radio                                  |   | regional, local, national (NPR)  |   |
| Television                             |   | local & regional   |   |
| Billboard                              |   |  |   |
| Other (describe)                       |   |  |   |
| <b>Total</b>                           | <b>\$-</b>  | <b>\$5,000.00</b>  | <b>\$-</b>                              |
| <b>Other Eligible Expenses</b>         |   |  |   |
| (describe)                             |   | \$10,000.00  |   |
| (describe)                             |   | movie showings   |   |
| (describe)                             |   | opening party  |   |
| (describe)                             |   | dinner & movie   |   |
| <b>Total</b>                           | <b>\$-</b>  | <b>\$10,000.00</b>   | <b>\$-</b>                              |
| <b>Total Expenses</b>                  | <b>\$-</b>  | <b>\$20,000.00</b>   | <b>\$-</b>                              |
| <b>Net profit/Loss</b>                 | <b>\$-</b>  | <b>(\$10,000.00)</b>   | <b>\$-</b>                              |
| <b>Award Amount</b>                    |   | <b>\$10,000.00</b>   |   |

**From:** [Katherine Lang](#)  
**To:** [ATAX](#)  
**Subject:** Description of Beaufort History Museum Project for 2025-26 ATAX application\*  
**Date:** Friday, August 29, 2025 2:24:44 PM

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

Beaufort on Stage & Screen: A three-Century Love Affair

Beaufort's legacy with the dramatic arts goes back to the late 19<sup>th</sup> century, with Maude O'Dell, a Beaufort-born star on Broadway and in Hollywood. Since that time, we have been a favorite destination for filmmakers.

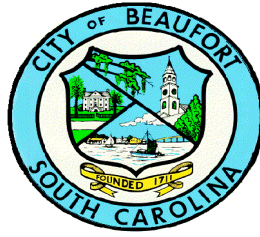
Beaufort History Museum's goals are to drive local and visitor traffic to this rotating exhibit, position Beaufort as a film-rich cultural destination, boost museum memberships and repeat visitation through special programming, and to tie Beaufort's stage and film legacy into our broader destination story (heritage, arts, and culture). The exhibit will consist of film posters with accompanying texts, filmed conversations with locals, and film viewings.

All the requested funds will be used for promotion and marketing. The effectiveness of the campaign will be evaluated by digital metrics, social engagement (likes, shares, saves, user-generated content), & PR reach.

\* Please note: After multiple tries and consultations to import the application & financial statement into one document along with this project description, I am sending them separately. I apologize, and hope that you will accept them. Katherine Lang

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 24 | Applicant Presentations to TDAC, City Council Chambers                                   |
| September 30 | TDAC Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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 Ave 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 related event patrols

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

2025 ATAX award \$20,000 (Beaufort City)

List Accommodations Tax funding that has previously been awarded by 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 1/26 End – Month/Year 12/26

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

6. Applicant Category (check all that apply)

- on-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: \$ 35,000

Accommodation Tax Funds Requested: \$ 17,500

Project Funding from Other Sources: \$ 17,500

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 make a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

BWSAR is the 911 water emergency responder, 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).

B. A defined budget for the 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 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.**

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". I attended the mandatory City of Beaufort ATAX Workshop on 8/15/25 and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name Patrick Canning

Signature 

Date 8/27/25

# Beaufort Water Search and Rescue

Serving Beaufort County Since 1975



**2025**

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 97 rescue missions in our local waterways totaling 2,249 man hours.

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

Beaufort Water Festival for 10 days  
Dragon Boat races, downtown Beaufort  
YMCA Beaufort River Swim  
Tybee Island, GA kayak race  
Two Kayak races in Beaufort  
Water Festival Kayak race  
4th of July fireworks for Port Royal and Bluffton  
The Sailing Regatta for Beaufort Yacht Club  
Blue Angels bi-annual Air Show  
In charge of the river closure for the water festival air show  
Low Country Boil kayak race in Hilton Head  
Christmas Parade of Lights Boat in Beaufort, Hilton Head and Dataw Island  
New Year's Eve fireworks downtown Beaufort  
Fireworks for Gullah Festival  
Paddle Battle Biathlon  
Hunting Island Paddlefest

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.

In conjunction with the Port Royal Sound Foundation, Junior Service League, USCB, Beaufort Sail & Power Squadron and community Outreach Programs we provide support for a number of events such as Touch a Truck with area school districts and daycare to engage with children in boating.

**Statement Of Accounts (2025 fiscal year)** July 1, 2024 thru June 30. 2025

|                                    |                     |
|------------------------------------|---------------------|
| <b>Revenues</b>                    |                     |
| Individual Donations               | \$3,000.00          |
| fiscal 2024 carry forward          | \$22,937.60         |
| Beaufort County Grant              | \$40,000.00         |
| Beaufort City Grant                | \$20,000.00         |
| County Stipend (\$2,500 quarterly) | \$10,000.00         |
| Asset Sales                        | \$14,200.00         |
| Fundraising                        | \$40,562.00         |
| <b>Total</b>                       | <b>\$150,699.60</b> |

|                                |                     |
|--------------------------------|---------------------|
| <b>Expenses</b>                |                     |
| General Administrative Expense | \$7,691.43          |
| Maintenance                    | \$11,871.00         |
| Equipment Purchases            | \$14,333.30         |
| Fuel Expense                   | \$1,364.16          |
| Insurance                      | \$6,074.21          |
| Utilities                      | \$8,607.86          |
| Purchase of R4                 | \$35,670.00         |
| Purchase of Rigid Inflatable   | \$15,516.00         |
| <b>Total</b>                   | <b>\$101,127.96</b> |
| <br>Net                        | <br>\$49,571.64     |

**Statement Of Accounts (2026 fiscal year)** July 1, 2025 thru June 30. 2026

|                           |                     |
|---------------------------|---------------------|
| <b>Revenues</b>           |                     |
| Individual Donations      | \$3,000.00          |
| fiscal 2024 carry forward | \$49,571.64         |
| County Stipend            | \$10,000.00         |
| Asset Sales (anticipated) | \$12,000.00         |
| Fundraising               | \$42,000.00         |
| <b>Total</b>              | <b>\$116,571.64</b> |

|  |                         |
|--|-------------------------|
| <b>Expenses</b>                        |                         |
| General Administrative Expense         | \$7,500.00              |
| Maintenance                            | \$10,000.00             |
| Equipment Purchases                    | \$5,500.00              |
| Fuel Expense                           | \$3,000.00              |
| Insurance                              | \$6,250.00              |
| Utilities                              | \$8,750.00              |
| Purchase of (additional boat) Bluffton | \$35,000.00             |
| (BWSAR funds)                          | \$17,500.00             |
| City of Beaufort (ATAX funds)          | \$17,500.00             |
| Purchase R9 (replacement)              | \$40,000.00             |
| (BWSAR funds)                          | \$20,000.00             |
| Beaufort County (ATAX funds)           | \$20,000.00             |
| <br><b>Total</b>                       | <br><b>\$116,000.00</b> |

1 JUL 2024-30 JUN 2025

97 calls for service, 2,249 man hours

7 calls cancelled enroute

2 airboat calls (Two separate incidents of boats stuck in the marsh on Fripp Island).

Some highlighted calls include rescuing individuals off three sinking boats, assisting Beaufort County Sheriff's Office with a suicidal female near Burke's Beach. Transported injured persons from a boat near Daufuskie Island who were ejected from the boat after running aground.

One airboat call for a boat aground in Lucy Creek. Evacuated two adults, two small children and a dog.

Some highlighted calls include rescuing a kitten from the Woods Memorial Bridge, rescuing two individuals from a sinking boat in Broad River. Male victim had two prosthetic legs. Responded to an overdue kayaker from Sands Beach in Port Royal. Located the kayaker within 30 minutes and returned him to the shore. Other calls for service were for boats that ran aground, broke down or out of fuel.

6/27/2025 2130 hrs. Responded to a capsized boat with four people onboard in Skull Creek near Skull Creek Boathouse, Hilton Head, SC. Two injured and two missing along with two dogs. Arrived on scene with four assets and assumed incident command. Transported the two injured to the dock and turned over to medical personnel. Searched for several hours to no avail. Scene turned over to DNR at 0200 the following morning. Two victims and the two dogs were discovered by DNR divers trapped under the vessel.

In addition to the calls for service we respond to, we provide safety boats for the following events:

Beaufort Water Festival

Dragonboat Races, downtown Beaufort

YMCA Beaufort River Swim

Tybee Island, GA kayak race

Two kayak races in Beaufort

Water Festival kayak race

4<sup>th</sup> of July fireworks for Port Royal and Bluffton

The sailing Regatta for Beaufort yacht Club

Parade of lights boat parade for Christmas in Beaufort, Hilton Head and Dataw Island

Blue Angels air show bi-annually

Manage the Beaufort River closure during the airshow for the Beaufort Water Festival

Fireworks for the Gullah Festival

New Year's Eve Fireworks for Beaufort and Bluffton

Clayton F Emminger

Chief, BWSAR

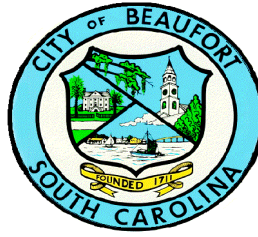
817 Paris Ave

Port Royal, SC 29935

(843) 263-8717

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

### TOURISM DEVELOPMENT ADVISORY COMMITTEE

The South Carolina Accommodations Tax (ATAX) Law Code Title 6 requires a two percent tax on overnight accommodations in addition to statewide sales tax. South Carolina Code 6, Chapter 4, Allocations of Accommodations Tax Revenues states how those monies are to be allocated. A portion of ATAX funds are allocated to the local municipality or county, and a portion of those funds are allocated for local grant awards to qualifying organizations to conduct activities, events and exhibits that support and increase local tourism, and future ATAX revenues.

This ATAX Grant Application is to apply for funding from the Beaufort Accommodations Tax Fund. Applications are reviewed by the Beaufort Tourism Development Advisory Committee (TDAC). The TDAC makes funding recommendations to the Beaufort City Council. The Beaufort City Council approves all final ATAX grant awards for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold workshops for applicants to learn about the application requirements and recommendation process and identify other organizations for collaboration opportunities. Applicants must attend one of two workshop sessions to apply for ATAX funding. All applications must be fully completed and received by the application due date. Approved applicants are required to make presentations to the TDAC Committee during a public meeting.

#### 2025-2026 ATAX Calendar

|              |  |
|--------------|--|
| August 6     | Applications Available   |
| August 15    | Workshop 1, 2:00pm, Community Development Conference Room                                |
| August 18    | Workshop 2, 10:30am, Community Development Conference Room                               |
| August 29    | Applications due by 4:00pm   |
| September 24 | Applicant Presentations to TDAC, City Council Chambers                                   |
| September 30 | TDAC Recommendations Meeting   |
| October 14   | City Council Work Session, TDAC Presentations ( <i>subject to change</i> )               |
| November 18  | City Council Regular Meeting, Approval of ATAX Grant Awards ( <i>subject to change</i> ) |

Online applications are available at <https://cityofbeaufort.org/300/Tourism-Development-Advisory-Committee> and must be completed on or before the due date. The City of Beaufort, Finance Department will confirm by email from address: [atax@cityofbeaufort.org](mailto:atax@cityofbeaufort.org), that the applications has been received. 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. Applications must be submitted online. Accommodation tax funds are for use by non-profit organizations.
2. If your organization received funding last year, a copy of the financial statement for the event or project must accompany your application.
3. Funding is administered through a reimbursement method. An ATAX Final Report and Reimbursement Request form must be submitted. All areas of the form must be completed including a summary of the approved event or project and a final report of all revenues and expenses. Documentation of approved expenditures eligible for reimbursement must be submitted . Supporting documents include signed contract(s), invoices, and proof of payment.
4. All Funding should be matched on at least a 50-50 basis with the exception for the City's Designated Marketing Organization. Matching funds do not have to be tourism related expenditures but cannot be from other ATAX funded sources.
5. Accommodation tax funds may not be awarded purely on local functions.
6. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
7. All organizations receiving Accommodation Tax funding are subject to an audit.
8. Any profit may be deducted from your final grant reimbursement amount.
9. The expectation is that organizations will work toward financial autonomy or seek other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism 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. That 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 complement advertising include materials that create awareness and build or maintain a good image of Beaufort.
  - c. The purchase of recognized media advertising focused on attracting visitors to the Beaufort area (social media, print, broadcast).
  - d. Advertising activities must be in markets more than 50 miles from Beaufort or with a 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. All applicants who receive ATAX grants for "Marketing and Promotion" should coordinate with the Designated Marketing Organization (DMO) and the ads should fit within the DMO's current advertising plan. Although the DMO is an ATAX grant recipient, the DMO does not use its awarded ATAX funds to execute ad campaigns for other organization receiving ATAX funds.
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 references to the DMO in all of their marketing materials:
  - a. Reciprocal website links to the designated DMO.
  - b. 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 the Final Report and Reimbursement Request by the deadline may result in penalties up to and including cancelation of the ATAX grant award.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified from applying for ATAX grants for two years.
11. Applicants are encouraged to schedule events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March).

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 event or project?
  - b. What is the anticipated attendance of tourists, having traveled more than fifty miles to attend.
  - c. Describe how the impact on tourist attendance will be evaluated and measured.
  - d. Describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain how marketing or promotional plans 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 financed until reimbursement is received.
4. Budget
  - a. Applicants must submit their event or project budget.
5. Prior History and success with City of Beaufort ATAX grant awards.
  - a. Describe the event or project, and amount(s) of prior ATAX grant awards received from the City of Beaufort in the past 5 years.
  - b. Describe the success and challenges of the event or project.

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

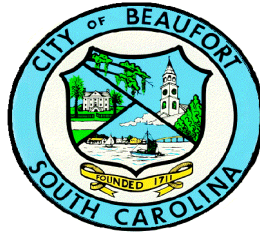
Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

# ACCOMMODATIONS TAX GRANT APPLICATION

2025-2026



## CITY OF BEAUFORT

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  - b. Describe the success and challenges of the event or project.

# 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 by 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)

\_\_\_\_\_ on-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 make 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 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 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.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria". I attended the mandatory City of Beaufort ATAX Workshop on \_\_\_\_\_ and acknowledge that any misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2025-2026 Accommodations Tax Funds.

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

CAROLINA  
B I G H T  
BIRDING  
C E N T E R



**City of Beaufort**  
**ATAX 2026**



Jenn Clementoni, Executive Director

# Our Mission

The Mission of The Carolina Bight Birding Center, is to enhance and preserve the diversity and quantity of bird populations in The Carolina Bight and The Atlantic Flyway



# What is The Carolina Bight & Why is it Important to Birds?

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- The Carolina Bight is the area that includes the Calibogue Sound and The Port Royal Sound, Rivers in the Carolina Bight include the Beaufort, Broad, Chechessee, Colleton, May, Pocataligo, Tulifiny and The Whale Branch River
- This region is home to 50% of the salt marsh in the entire state of South Carolina; with South Carolina having the largest amount of salt marsh in the nation
- Because of our unique landscape featuring maritime forests and saltwater estuaries, the amount of bird species that call this area home, or migrate into/through each year, is about 300 in total; and growing!
- Numerous endangered or threatened species call our area home, either year-round or temporarily, ranging from sparrows, songbirds, wading birds and shorebirds





# How Birding Boosts Economies

# Birding Impacts on Tourism & The Economy

- The segment of The Carolina Bight Birding Center's tour business has a YTD increase of 1730% on booked tours versus last year, per FareHarbor our booking engine
- Our Social Media presence has doubled year to date
- 90% of our booked tours are from visitors, including, Canada, Michigan, California, North Carolina, Georgia, New York, Pennsylvania, Ohio, Indiana, Kentucky, Washington, Massachusetts and Oregon
- \$108 Billion spent annually on birding trips (such as food & lodging) and equipment (such as bird seed & binoculars)\*



This Photo by Unknown Author is licensed under CC BY-SA

\*US State of The Birds Report 2024

# Birding Impacts on Tourism & The Economy

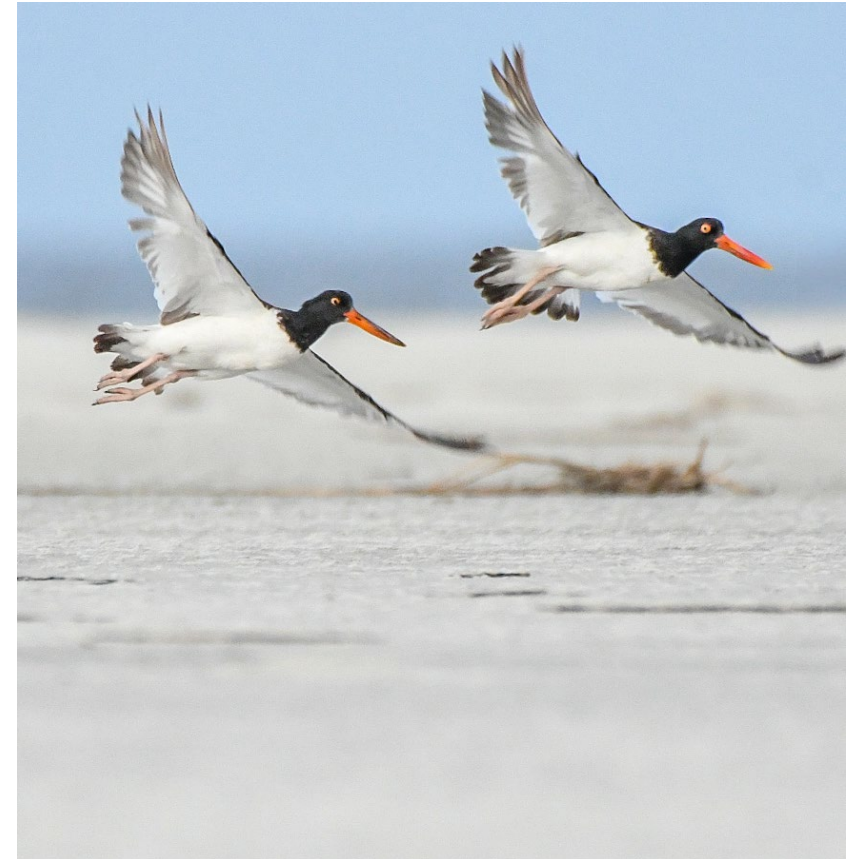
- 1.4 Million Jobs related to birding trips & equipment expenditures generated \$90 Billion in labor income\*
- \$38 Billion in total annual tax revenue generated by birding activity\*:
  - \$7 Billion in County Taxes
  - \$9 Billion in States Taxes
  - \$22 Billion in Federal Taxes
- \$279 Billion in Total Economic Output generated by Birding Expenditures in The United States\*
- The City of Beaufort can benefit tremendously by attracting bird enthusiasts consistently to our area



# Why Are We Confident in our Ability to Drive Tourism into Beaufort?

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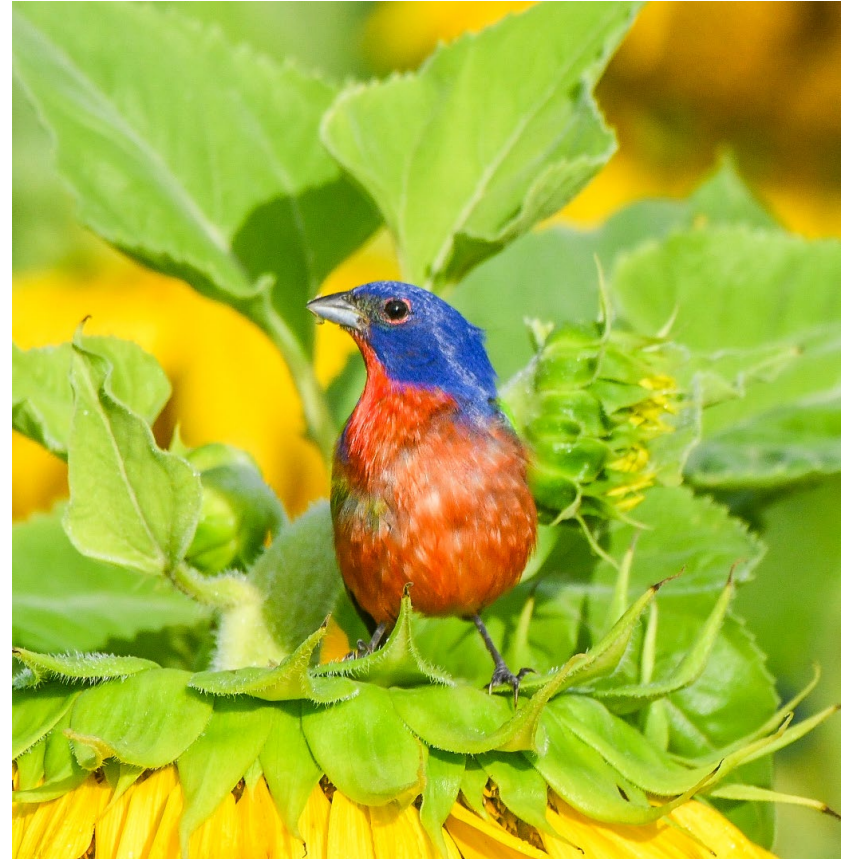
- With our grand celebration and “Wings Over Beaufort” festival September 23-26, 2025, our new nonprofit is officially on the map
- Because of the dynamic tour agenda, including world renowned author and ornithologist, David Allen Sibley as our Keynote Speaker; enthusiasm about The Carolina Bight Birding Center is reaching a broad audience in the US and Canada
- Well established connections in the birding community, scientific organizations and our social media presence, puts our organization in an excellent position
- Support based on ticket sales, enthusiasm from the community and incoming tourists, as well as donations, gives us confidence in our ability to successfully execute events now and in the future



# How are we Able to Measure Tourism Attendance at our Events?

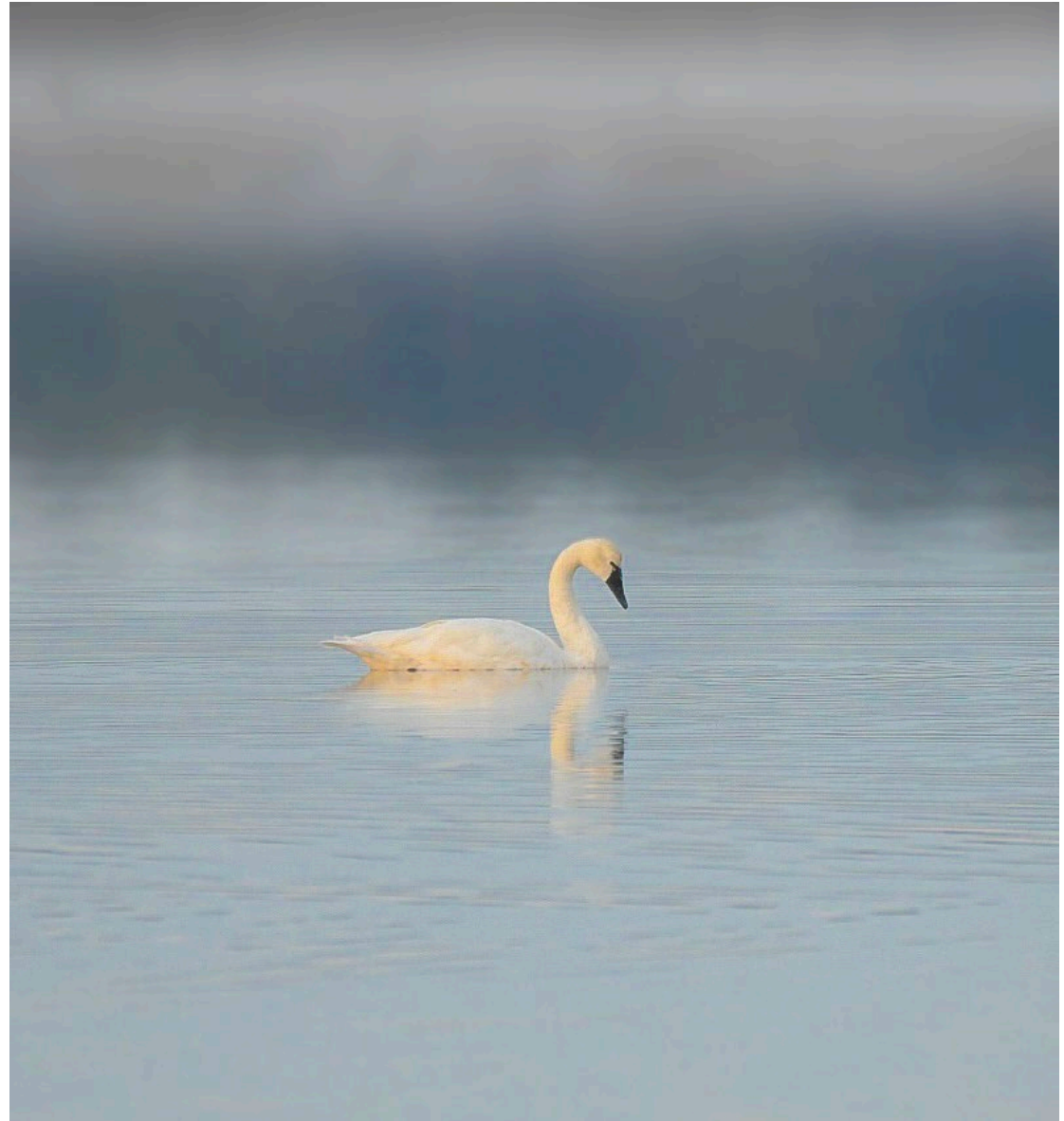
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- Through our third-party booking agency, FareHarbor, we are able to capture information pertaining to customers that pinpoint the areas from which they are traveling from
- We also partner with The CVB to assist with monitoring data during our events, and can incorporate that data into reports
- Our social media presence and ads also provide important demographics ranging from geographic region, age, gender, hobbies and interests. This also includes clickthrough rates and watch time



# Project 2

**The Wonders of Wintering  
Birds in The Carolina Bight**



# Millions of Birds Pass Through our Region During Spring & Fall Migration

- Every year during Spring and Fall Migration, millions of birds use the Atlantic Flyway to migrate to and from their breeding grounds
- Our beaches, maritime forests, agricultural fields and waterways become breeding grounds, as well as areas for food source
- Long distance migrants, such as the Red Knot and Whimbrel, travel from as far away as Argentina and Chile
- These birds stop in The Carolina Bight after flying nonstop for weeks, to feed and double their body weight. They must do this, in order to continue their journey to their Arctic breeding grounds. Total roundtrip distance of nearly 19,000 miles
- Colorful and sought after bird species like the Painted Bunting or Indigo Bunting breed here; alongside Osprey, Hummingbirds, Bald Eagles, Owls, Woodpeckers and other native songbird species like the Carolina Wren or Northern Cardinal. **Numerous migratory species call our area home for the winter.**



# The Atlantic Flyway



*Atlantic Flyway  
(with Principal Routes)*

- Major Flyway
- Principal Routes
- Merging Routes (with other routes)

# The Wonders of Wintering Bird of the Carolina Bight

- An engaging and educational Friday evening event on January 23, 2026, featuring presentations from experts and leaders in the birding, education and research community
- Scheduled tours on Saturday, January 24, 2026, in Beaufort and Hunting Island State Park, offering the best of both worlds when it comes to birdwatching and gaining an appreciation for Beaufort
- These dates do not conflict with any currently scheduled events or festivals listed on The Visit Beaufort online calendar
- These dates do not conflict with NCAA Championship Football or The Superbowl
- Achieves the heads in beds scenario with a two-day event. Encourages shopping in the Downtown area and mouths to be fed via our wonderful restaurants



# Proposed Agenda

| DATE                                  | DESCRIPTION  | DETAILS   |
|---------------------------------------|--|---|
| January 23, 2026<br>6:00 p.m.         | The Wonders of Wintering Birds of The Carolina Bight | Presentations from experts and leaders in birding about migration, conservation, the latest research as well as tips and tricks when birding in The Carolina Bight during the winter months |
| January 24, 2026<br>9:00 -11:00 a.m.  | Tour Option 1 – Birding Beaufort via Walking Tour    | Explore some of the most beautiful spaces in Beaufort while sighting the birds that call this area home   |
| January 24, 2026<br>9:00 – 11:00 a.m. | Tour Option 2 – The Shorebirds of Hunting Island     | Walk the federally protected north end beach of Hunting Island for a chance to sight and learn about some of the endangered species that call this area home                                |

# Proposed Agenda

| DATE                                 | DESCRIPTION                                       | DETAILS  |
|--------------------------------------|---|--|
| January 24, 2026<br>1:00 – 3:00 p.m. | Tour Option 3 – Birding Beaufort via Walking Tour | Explore some of the most beautiful spaces in Beaufort while sighting the birds that call this area home  |
| January 24, 2026<br>1:00 – 3:00 p.m. | Tour Option 3 – The Shorebirds of Hunting Island  | Walk the federally protected north end beach of Hunting Island for a chance to sight and learn about some of the endangered species that call this area home |

# Budget & Impacts on Tourism

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- Grant request tied to this event is \$9,000
- This would include event space costs, printed ads, social media promotion and marketing campaigns
- The project will encourage tourism from birders and nature enthusiasts, who do not have the bird species in their region that Beaufort does in the winter.



# How are we Able to Measure Tourism Impacts?

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- Because of what our third-party booking agency, FareHarbor offers, we are able to capture individual information pertaining to customers that pinpoint the areas where they are traveling from. This includes free events, as well as paid events.
- We also partner with The CVB to assist with monitoring data during our events and can incorporate that data into reports
- Our social media ads also provide important demographics ranging from geographic area, age, gender, hobbies and interests. This also includes clickthrough rates and watch time



# Marketing Plans

Via Social Media (Facebook, Instagram and TikTok) with targeted marketing to regions where this would be of heightened interest

Plot out a cohesive and appropriate marketing plan for print and digital ads via the CVB and SC Lowcountry Tourism agencies

Launch a strategic campaign with outreach to clients, attendees of the Wings Over Beaufort festival as well as our social media following

# Coordination and Collaboration



Work diligently with the CVB and SC Lowcountry Tourism teams. Having an already established & healthy working relationship with both, makes collaboration seamless



Outreach to local birding organizations such as Audubon (including local Audubon or Birding Clubs); Friends of Hunting Island, SCDNR, USCB and PIRLS



Our marketing plans fit into the “Outdoor Recreation” category as defined in the grant application



# Our Financials

- Please note, because we are a newly established nonprofit, we do not have any historical financial statements to provide



# The Carolina Bight Birding Center Team

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## Our Board

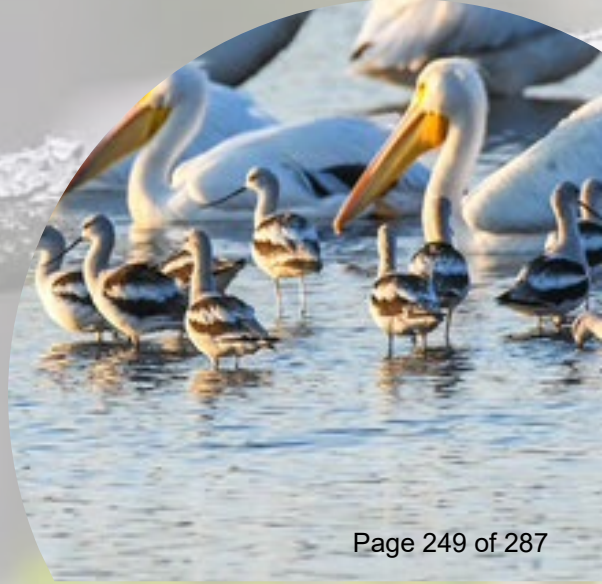
- Hope Freeman
- Bill Quarles
- Dick Stewart
- Sharon Stewart
- Jennifer Tuckwiller
- Cherimie Weatherford
- Courtney Worrell
- Executive Director, Jenn Clementoni





# Thank You for Your Time and Consideration

Photos by Jenn Clementoni





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**City of Beaufort**  
Department Request for City Council Agenda Item

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**To:** City Council **Date:** 10/08/2025  
**From:** John Sauve, Deputy City Manager  
**Item Name:** Public Camping Ordinance Proposed Update  
**Meeting Date:** October 14, 2025  
**Department:** City Managers Office

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**Background Information:**

**Introduction:**

This memorandum recommends that Council give first reading to the attached ordinance amending City Code § 9-1003 at its November 2025, regular meeting. The revisions clarify definitions, extend protections to privately owned locations that function as public space, and add due process safeguards.

**Background:**

- **Enforcement gap.** Beaufort Police have encountered individuals sleeping or storing belongings in the doorways of privately owned businesses. The current ordinance proscribes camping on property “owned by the City,” creating ambiguity during enforcement.
  
- **Legal review.** On July 21, 2025, the City Attorney advised staff by email that the section could be amended to remove the ambiguity and remain enforceable.

**Legal Authority:**

- Municipalities possess broad police-power authority to enact regulations “for the preservation of health, peace, order and good government.” S.C. Code Ann. § 5-7-30 (2022)

- The penalty clause is within the limits prescribed by state law. S.C. Code Ann. § 5-7-260 (2022)
- The warning requirement follows best-practice guidance from federal First and Fourteenth Amendment case law.

**Staff Recommendation:**

No additional personnel or capital costs are anticipated. The Beaufort Police Department will incorporate the warning step into standard operating procedures, and Municipal Court can absorb any additional caseload.

**Recommendation & Next Steps**

1. Approve first reading of the attached ordinance at the November 2025 regular meeting.
  2. Schedule a second reading for the December 2025 regular meeting.
- 

**Placed on Agenda For:**

**Attachments:**

1. 1412.0168 Proposed Camping Ordinance
2. Current Public Camping Ordinance
3. Camping Ordinance Change Table 07222025

**Sec. 9-1003: - Camping in public places prohibited.**

(a) *Definitions.* The following definitions apply for purposes of this section:

- (1) *Camp* or *camping* shall mean the use of public places for living accommodation purposes, such as sleeping activities, or making preparation to sleep, including the laying down of bedding for the purpose of sleeping, or storing personal belongings, or making any fire or using any tents or shelter or other structure or vehicle for sleeping, or doing any digging, or earth breaking, or undertaking cooking activities. The above-listed activities constitute camping when it reasonably appears, in light of all the circumstances, that the participants, in conducting these activities, are in fact using the area as a living accommodation.
- (2) *Storing personal property* shall mean leaving one's personal effects, such as, but not limited to, clothing, bedrolls, cookware, sleeping bags, luggage, knapsacks, or backpacks, unattended for any substantial prolonged length of time. This term shall not include parking a bicycle or other mode of transportation.
- (3) *Public place* shall mean any area, whether privately or publicly owned, to which the public has access by right or by invitation, express or implied.
- (4) *Public park* includes all municipal parks, public playgrounds, public plazas, attractions, and monuments.

(b) *Activities prohibited:*

- (1) It shall be unlawful to camp, to sleep, or to store personal property in any public place or public park.
- (2) It shall be unlawful to camp, to sleep, to store personal property, or to sit or to lie down in any public place so as to interfere with ingress or egress from buildings or to impede the public's ability to use streets, sidewalks, or other rights of way.

(c) *Warning.* No person may be arrested for violating this code section until he or she has received an oral or written warning to cease the unlawful conduct. Warnings are not particular to a location but to the unlawful conduct overall. If the violator fails to comply with the warning issued, he or she is subject to arrest pursuant to this section. Warnings may include, but are not limited to, signage that provides conspicuous notice to a person that his or her conduct is unlawful and in violation of this section.

(d) *Enforcement and penalties.* Upon willful failure to comply with the warning issued, the person so warned is subject to arrest for violation of this section,

and upon conviction may be fined an amount not to exceed five hundred dollars (\$500.00) or imprisoned for not more than thirty (30) days.

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**Sec. 9-1003: Camping on public property prohibited.**

- (a) *Definition.* As used in this section, the terms *camp* or *camping* shall mean the use of public parks, buildings, or grounds or private property for living accommodation purposes, such as sleeping activities, or making preparation to sleep, including the laying down of bedding for the purpose of sleeping, or storing personal belongings, or making any fire or using any tents or shelter or other structure or vehicle for sleeping, or doing any digging, or earth breaking, or undertaking cooking activities. The above-listed activities constitute camping when it reasonably appears, in light of all the circumstances, that the participants, in conducting these activities, are in fact using the area as a living accommodation.
- (b) *[Unlawful to camp on any public property.]* Except as may be permitted within municipal parks by director of downtown operations, or his or her designee, it is unlawful to camp upon any public property owned by the city, including, without limitation, streets, easements, parks, parking lots, or other public property, or to start or maintain an open fire on said property in violation of the state or city fire code.
- (c) *Enforcement and penalties.* No person may be arrested for violating this code section until he or she has received an oral or written warning to cease the unlawful conduct. Upon willful failure to comply with the warning issued, he or she is subject to arrest for violation of this code section, and upon conviction may be fined not to exceed five hundred dollars (\$500.00) or imprisoned for not more than thirty (30) days.

(Ord. No. O-29-20, 10-13-20)

| § / ¶ affected                                   | Original Text (City Code § 9-1003, 2022 ed.)  | Proposed Text (draft dated July 2025)  | Reason for change  |
|--|---|--|--|
| Definitions – add<br>“Storing personal property” | <i>N/A – term not defined</i>   | “Storing personal property shall mean leaving one’s personal effects ... unattended for any substantial prolonged length of time”  | Clarifies that unattended bundles/ carts are covered, closing an enforcement gap.  |
| Definitions – revise<br>“Public place”           | Limited to property <b>owned by the City</b> (streets, sidewalks, parks).                         | “Public place shall mean any area, <b>whether privately or publicly owned</b> , to which the public has access by right or by invitation, express or implied”                      | Removes ambiguity noted by the City Attorney that entrances to private businesses were not clearly covered.                |
| Definitions – add<br>“Public park”               | <i>N/A</i>  | “Public park includes all municipal parks, public playgrounds, public plazas, attractions, and monuments”  | Gives officers an easy reference when citing violations on park land.  |
| Prohibited acts – subsection (A)                 | “It shall be unlawful to camp, sleep or store personal property in any public place.”             | (i) Retains prior sentence; (ii) <b>Adds:</b> “or to sit or to lie down ... so as to interfere with ingress or egress... or impede ... streets, sidewalks, or other rights-of-way” | Extends coverage to obstruction conduct that often accompanies sidewalk camping, improving pedestrian safety.              |
| Enforcement – new<br>Warning requirement         | No warning requirement; immediate citation/arrest permissible.                                    | “No person may be arrested ... until he or she has received an oral or written warning to cease the unlawful conduct...”   | Ensures due-process notice and provides officers discretion; aligns with best-practice civil-liberties guidance.           |
| Enforcement – penalties paragraph clarified      | Penalty incorporated by general code (§ 1-106): up to \$500 / 30 days but not stated in § 9-1003. | Explicit statement added: “...may be fined an amount <b>not to exceed five hundred dollars (\$500)</b> or imprisoned for <b>not more than thirty (30) days</b> ”                   | Mirrors S.C. Code §§ 5-7-30 & 5-7-260 authorizing municipal penalties, making consequences transparent within the section. |



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**City of Beaufort**  
Department Request for City Council Agenda Item

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**To:** City Council **Date:** 10/07/2025  
**From:** Curt Freese, Community Development Director  
**Item Name:** Short Term Rental Discussion  
**Meeting Date:** October 14, 2025  
**Department:** Community Development Department

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**Background Information:**

**Introduction:**

**UPDATE:**

Since the August 19, 2025, City Council Work-session, the STR Ordinance has been updated based on Council's direction and also received an official recommendation from the Planning Commission.

**Revisions since Work-session:**

**1. Clustering of STRS**

Council expressed concern over clustering of multiple STR's on one street or neighborhood.

**Proposed Code:**

C. 4. A Short Term Rental may not be located closer than 300 feet to any other Short Term Rental (measured from property line to property-line).

**Analysis:** Staff found numerous examples around the country of clustering regulations, which either required a distance between STR's or only one STR per block. As many subdivisions in Beaufort do not have traditional blocks, Staff chose the distance requirement. Three hundred feet was selected, as it is the length of a typical downtown Beaufort Block. An analysis of the impact of the 300' distance requirement was prepared by the GIS Analyst, found in this packet. The conclusion is the 300' distance would mimic the 6% cap, and only further restrict the 6% cap in a few neighborhoods.

**2. Equitable Waitlist**

Council directed Staff to create a waitlist within the proposed ordinance.

**Proposed Code:**

E. 8. r. Wait-List: The City shall maintain a Short Term Rental waitlist for each defined neighborhood. The Waitlist will require the same application procedure as a Short Term Rental. The City shall utilize the wait-list and the next eligible valid Short Term Rental application, in permitting new Short Term Rentals

**Analysis:** The waitlist would be enshrined as a process within the code to ensure that new permitted STR’s would be open to any property, and the formal application process would be required to place a property on the waitlist.

**3. Licensing:**

Council directed Staff to remove a separate yearly annual license due in July in the original draft ordinance.

**Proposal:** Ordinance changed to remove the July licensing, and coordination with Finance to attach the license to the business license and send out an affidavit with the business license renewal for Short Term Rentals.

**Planning Commission Recommendation**

The Planning Commission discussed draft changes to Section 3.6.2 Short Term Rentals, Accessory Uses Section 3.11.2, and Carriage Houses/Accessory Dwelling Units Section 4.5.3 at their August and September work-sessions, with a formal unanimous vote for approval of the changes at their September 15, 2025, meeting. The draft changes were proposed after the August regular Planning Commission meeting, in which public discussion on Accessory Dwelling Units and Short Term Rentals was held.

The recommendation was limited to Section 3.6.2, 3.11, and 4.5.3, and did not include the STR standalone ordinance. Effectively, the requirements for STR’s were removed from the Development Code in the recommendation, with the idea they’d be placed in the standalone STR license in the Municipal Code. In addition, the PC limited ADU’s from two to one per lot, with the ability to apply for a Special Exception for an additional ADU.

**Owner Occupied Recommendation:** The Planning Commission recommended the additional sentence below in Section 3.6.2, to effectively ban non-owner occupied short term rentals: “Short term rentals, where the owner does not live on premises, are prohibited.”

**Analysis:** Staff is agnostic on the recommendation of the PC. Should the City Council accept the PC’s recommendation, portions of the attached draft STR ordinance must be removed and revised before a public hearing for its adoption is scheduled with City Council.

**Background:**

The City Manager tasked City Staff to draft a new standalone short term rental ordinance. The proposed draft ordinance attached, was developed after a number of meetings with the following internal staff group:

- Curt Freese, Community Development Director
- Alan Eisenman, Finance Director
- Justin Rose, Business License Inspector/Administrator
- Kat Kirkland, GIS
- Christopher Klement, Planner III
- Ken Meola, Code Enforcement Officer
- Bruce Skipper, Building Official

John Badget, Fire Marshall

The group reviewed the current ordinance, the current short term rental licenses and policies, inspections, complaints, and staff capacity, with Short Term Rental policies and practices around the State of South Carolina.

The draft ordinance is intended for discussion and is intended to address the aforementioned issues. Staff would note such a standalone ordinance, should it be adopted, therefore requires revisions to the existing requirements of Section 3.6.2 C. 2. of the Development Code. This Section would merely lay out the eligible zoning districts, while all other regulation would be found in the standalone ordinance in the Municipal Code.

**Legal Authority:**

S.C. Code Ann. § 6-29-310 et seq.; S.C. Code Ann. §§ 5-7-30, 5-7-60; Southern Bell v. Spartanburg, 285 S.C. 495 (1985)

**Staff Recommendation:**

This item is intended for discussion and Council direction, specifically on whether or not Council favors the proposed changes and if the Council agrees with the PC's recommendation for only owner occupied STR's.

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**Placed on Agenda For:**

**Attachments:**

1. Draft Revised Short Term Rental Ordinance
2. STR Memo with updates
3. ShortTermRentals Density GIS Analysis

## A. PURPOSE, APPLICABILITY, AND DEFINITIONS.

The purpose of this chapter is to regulate the use of residential licensing of dwelling units as short-term rentals in order to:

1. Protect the integrity of the city's neighborhoods and the quality of life of its citizens;
2. Establish a system to track the short-term rental inventory in the city;
3. To protect the health and safety of occupants of short-term rental units;
4. To ensure a level playing field for individuals in the short-term rental market; and
5. To protect the residential character of the residential dwelling units within the city.

## B. DEFINITIONS

The following definitions apply:

**DWELLING UNIT.** A structure, or portion thereof, providing complete living facilities for a single family including a complete kitchen. One structure may contain multiple dwelling units with different property tax classifications.

**GOOD STANDING.** A license shall be considered in good standing if:

1. The license has not been denied, revoked, or suspended in the current license year. A license which has been denied, revoked, or suspended in the current license year shall not be renewed except upon successful appeal of the denial, revocation, or suspension.
2. The license has not expired. A license shall be deemed expired fourteen (14) business days after the final day of the previous business license year.
3. A natural disaster or other Act of God renders the dwelling unit uninhabitable for a period of more than six months in the current business license year, or
4. Work related to valid building permit, carried out to address life, safety, or health violations documented by the Building Official renders the dwelling unit uninhabitable for a period of more than six months in the current business license year.

**INVESTMENT SHORT TERM RENTAL BUSINESS LICENSE (ISTR).** A license issued for a dwelling unit, to be rented as a short term rental, that:

1. Is not the legal residence of the owner; or
2. Is not the legal residence of the owner and was inherited from the person named as of record on XXX, 2025; or
3. Proof of inheritance shall be shown through a deed of distribution, court order, will or similar document.

**LEGAL RESIDENCE.** A dwelling unit assigned a 4% property tax ratio by the Beaufort County Assessor's Office under the requirements of S.C. Code § 12-43-220.

**OWNER-OCCUPIED SHORT TERM RENTAL BUSINESS LICENSE (OSTR).** A license issued for a dwelling unit to be rented annually and is the legal residence of the owner to be used as a short-term rental.

**SHORT TERM RENTAL OCCUPANT.** Any person who, in exchange for compensation paid, occupies a dwelling unit for less than 30 days.

**SHORT TERM RENTALS.** A dwelling unit, or any portion thereof, rented for any period less than 30 days and used in a manner consistent with the residential character of the dwelling. Tourist accommodations, including hotels, motels, inns, and bed and breakfasts, are not considered Short Term Rentals.

**TIME SHARES.** "Vacation time sharing plans" as defined in S.C. Code § 27-32-10(9) are not short-term rentals. However, any "vacation time sharing lease plan" as defined in S.C. Code § 27-32-10(8) that is less than three years is considered a short term rental. "Vacation multiple ownership interests" as defined in S.C. Code § 27-32-250(1) are not short term rentals.

**TRANSFER OF PROPERTY.** An assessable transfer of interest in real estate triggering an appraisal and reassessment for taxation purposes as defined by SC Code 12-37-3150.

### **C. REQUIREMENTS AND ELIGIBILITY:**

1. Any Short-Term Rental shall comply with Section 3.6.2 C 2 of the Beaufort Development Code.
2. Short Term Rentals operating before December xx 2025, with valid permit or proof of operation, may continue operation without counting toward the 6% cap, or the 300 foot distance requirement found in this code. The exemption of the 6% cap and 300 foot distance requirements for valid Short Term Rentals operating before December xx 2025, shall be lost at the sale, transfer of ownership, revocation of license as set by this ordinance, or non-operation of the Short Term Rental.
3. Short-term Rentals are limited to 6% of the dwelling units in the neighborhood as shown on the City of Beaufort Neighborhoods Map zoned T3-S, T3-N, T4-HN, T4-N and T5-UC.
4. A Short Term Rental may not be located closer than 300 feet to any other Short Term Rental (measured from property line to property-line).
5. Each eligible Investment Short Term Rental (ISTR) and Owner occupied short term rental (OSTR) lot is limited to one short term rental.
6. Short term rentals shall not be permitted for any accessory dwelling unit, carriage or pool house, with the following exception:
  - a) Owner occupied (OSTR) short term rentals, may be allowed one short term rental on any accessory dwelling unit, carriage or pool house.
7. Minimum Stay: 2 nights.
8. Parking: Parking shall be provided on-site and is encouraged to be located to the side or rear of the dwelling. The number of parking spaces provided on site as well as a site plan

showing the location of all on-site parking spaces. One on-site parking space must be provided. On-site parking shall be clearly delineated with an improved surface such as pavement, gravel, or another method approved by the administrator.

9. Signs: No on-site signs shall be permitted.
10. Monitored Fire Alarm: A monitored fire alarm is required for all units.
11. Outside Approvals Required: For properties located in a neighborhood with a property owners' association, written confirmation from the association president that short-term rentals are permitted in the neighborhood is required. In multifamily structures, written approval from the property management association is required.
12. Safety Inspection: A Safety Inspection shall be conducted before the Business License for the facility is issued.

#### **D. LICENSE, REGISTRATION, AND TAX REQUIREMENTS.**

- a) Any owner wishing to operate a short-term rental must maintain a current business license, comply with rental registration permit requirements, and make proper payment of local, county, and state taxes.
- b) *Business license.* A business license must be obtained and renewed annually by the submittal of a form and fee as established by the city for each residential dwelling unit or portion thereof offered as a short-term rental.
- c) No business license shall be issued for the rental of a residential unit which is planned or under construction until a certificate of occupancy is issued for the unit, except that a license issued for the rental of an existing residential unit may be renewed, or a new license issued for the rental of a replacement unit on the same site, upon issuance of a new certificate of occupancy and satisfaction of all other requirements for short term rental licenses. The replacement unit must be under the same ownership, contain the same or fewer heated square feet, and contain the same number or fewer bedrooms as the original STR permit.
- d) A business license shall only be issued to owners of a residential unit. Lessees of residential dwelling units may not apply for a business license to rent the unit.
- e) A designated agent may apply for a short-term rental business license on behalf of an owner. An application for a business license submitted by a designated agent must provide the correct taxpayer identification and contact information for the owner including name, address, phone number, email, and any other information as required on the application form.
- f) Failure to maintain good standing shall be considered grounds for denial of an application to renew and existing license
- g) To remain in good standing, an application to renew an existing license must be submitted no later than fourteen (14) days after the final day of the previous business license year.

#### **E. SHORT TERM RENTAL PERMIT**

**Short Term Rental Permit.** A rental registration permit must be obtained and renewed annually by the submittal of a form and fee as established by the city for each residential dwelling unit or portion thereof offered as a short-term rental.

1. *Annual registration.* The short term rental registration permit shall be effective for one calendar year.
2. No new business license to operate a short-term rental shall be issued prior to the approval of a rental registration permit.
3. Renewals of valid prior year business licenses shall be allowed prior to the approval of a rental registration permit. Failure to complete a rental registration permit application within 30 days of the business license renewal date shall be grounds for revocation of the license.
4. *Annual fee.* The fee for a rental registration permit shall be set by City Council and shall be reviewed periodically.
5. A rental registration permit shall only be issued to owners of a residential unit. Lessees of a residential dwelling unit may not apply for a rental registration permit.
6. A designated agent may apply for a rental registration permit on behalf of an owner. An application for a rental registration permit submitted by a designated agent must provide the correct taxpayer identification and contact information for the owner, including name, address, phone number, email, and any other information as required on the application form.
7. *Change in registered information.* The owner or designated agent of a rental dwelling already registered with the city shall re-register within 60 days after any change occurs in the registration information. There shall be no additional fee upon change of registration information except that a new owner of a registered dwelling, upon application for a new business license, shall re-register the dwelling and pay the appropriate fee within 60 days of assuming ownership.
8. *Information required.* Application for rental registration permit shall contain the following information:
  - a) The street address of the rental dwelling unit;
  - b) The unit number if applicable;
  - c) The number of bedrooms in each rental dwelling unit;
  - d) *Designation of local agent.* The owner of a rental dwelling shall designate a responsible agent who shall be responsible for operating the rental dwelling in compliance with the law. Official notices may be served on the responsible local agent and/or the owner, and any notice served on the agent shall be deemed to have been served upon the owner of record. Nothing shall prevent the owner of rental property from designating himself or herself as the agent.
  - e) Non-owner agents must be licensed by the State of South Carolina as an attorney, real estate agent, broker in charge, or property manager. Employees under the direct

supervision of attorneys, real estate agents, brokers in charge, or property managers licensed by the State of South Carolina may be designated as local agents.

- f) The agent shall be required to be able to physically respond to the site upon notification from the city within 60 minutes in case of emergency or need by the city for entry into the property.
- g) *More than one owner or ownership by entity.* Where more than one person has an ownership interest in a short-term rental, the required information shall be provided for each owner. In those cases in which the owner is not a person, the information required shall be provided for the organization owning the rental dwelling, and for the president, general manager, or other chief executive officer of the organization.
- h) The number of parking spaces provided on site as well as a site plan showing the location of all on-site parking spaces.
- i) The name, mailing address, email address, business phone number, personal phone number, and business address of the owner and local agent;
- j) The physical address and email address where the owner and local agent will accept notices and orders from the city and acknowledgment that service by U.S. Mail and/or transmission to the provided email addresses will constitute acceptable service of any notice, notice of violation, ordinance summons, or ticket;
- k) Certification that the owner has read applicable city ordinances, including, but not limited to, regulations regarding noise, trash, parking, alcohol on the beach, animals, litter, , requirements for special events, maximum occupancy, and golf carts;
- l) Certification that a copy of the parking diagram provided to the city for the property as well as a summary of applicable city ordinances, including, but not limited to, regulations regarding noise, trash, parking, animals, litter, requirements for special events, maximum occupancy, and golf carts is prominently posted within the residential dwelling unit to be rented;
- m) Certifications that tenants listed on any rental agreement shall receive a copy of the parking diagram provided to the city for the property as well as a summary of applicable city ordinances, including, but not limited to, regulations regarding noise, trash, parking, animals, litter, requirements for special events, maximum occupancy, and golf carts is prominently posted within the residential dwelling unit to be rented. The summary of applicable ordinances shall be in a form determined by the city, and made available to all owners of rental property;
- n) Proof of payment from the owner or designated agent for payment of local, county, and state taxes due on short term rental accommodations;
- o) Certification that the owner is aware that short term rental licensees shall be subject to strikes issued against the license when the owner, agent, occupant, or guest has been convicted of any violation of the requirements of this chapter or other city ordinances related to the use of the property as a short term rental, and that three strikes during

any rolling twelve-month period can result in suspension, revocation, or non-renewal of the license;

- p) Certification by the owner verifying the presence of smoke alarms, carbon monoxide monitors, fire extinguishers, the number of bedrooms, the number of parking spaces, the provision of trash receptacles, the posting of address and house numbers, and posting of rules and regulations, and, if present, that sprinklers are operational; and
- q) Documentation in the form of Beaufort County property records or a certificate of occupancy confirming the number of bedrooms offered for rent.
- r) Wait-List: The City shall maintain a Short Term Rental waitlist for each defined neighborhood. The Waitlist will require the same application procedure as a Short Term Rental. The City shall utilize the wait-list and the next eligible valid Short Term Rental application, in permitting new Short Term Rentals.

## **F. VIOLATIONS.**

*Violations.* Violations of this chapter include but are not limited to:

1. Operating a short-term rental without complying with the requirements of this chapter and the city code of ordinances;
2. Advertising a property as being available as a short-term rental without first complying with the requirements of this chapter;
3. Operating a short-term rental without a business license, registration permit, and accommodations tax account;
4. Advertising a short-term rental without listing the business license number and rental registration permit number;
5. Operating a short-term rental in such a manner that individual rooms are rented at the same time under separate rental contracts;
6. Advertising a short-term rental as being available for more overnight occupants, or more than the number of bedrooms, than have been permitted pursuant to this chapter;
7. Expanding the allowable occupancy of a short-term rental without obtaining a new permit;
8. Advertising more short-term rental units on a property than have been permitted pursuant to this chapter. For example, advertising a single-family dwelling as accommodating multiple short-term rentals is not permitted;
9. Advertising a property as a short-term rental or "event house" for events or parties with more than 25 people in attendance;
10. Offering a short-term rental in any zoning district for fewer than two consecutive nights;
11. Failure to post the business license number, rental registration permit number, allowable overnight occupancy, prominently within a rental unit;

12. Failure to obtain a rental registration permit within 30 days of renewing a business license, failure to provide accurate information for the registration of rental dwellings, failure to provide information required by the application form;
13. Failure to complete a new rental registration permit application within 60 days of a change in ownership;
14. Failure of the designated agent listed on the rental registration permit to respond physically to the site within 60 minutes of notification from the city of an emergency;
15. Failure to maintain, and provide to the city, any and all information required in this Section.
16. Failure to provide tenants listed on any rental agreement information as required in this Section.
17. Failure to inspect and repair any water or sewer related issues.
18. Operating a business out of a short term rental or otherwise using a short term rental for non-residential use except for allowable home occupations, e-commerce, and remote work; and
19. Operating a short term rental that has received three strikes within any twelve-month rolling period.
20. The number strikes shall be reset upon a change of ownership that results in no overlap with prior common ownership.
21. For the purpose of determining the total number of strikes, all convictions stemming from violations occurring within a single rental contract period shall be considered one instance. In no case shall strikes exceed one per rental contract period.

## **G. PENALTIES.**

No permit may be issued or approved unless the requirements of this chapter, or any ordinance adopted pursuant to it, are complied with. A violation of this chapter may result in the following penalties:

1. Any person violating any provision of this chapter shall be deemed guilty of a civil offense and shall be subject to a fine of up to \$500 upon conviction. Each day of violation shall be considered a separate offense. Punishment for violations shall not relieve the offender of liability for delinquent taxes, penalties, and costs provided for in this chapter.
2. Denial, revocation, suspension, or non-renewal of a business license pursuant to §§ or and in accordance with the appeal procedures set forth in §
3. Revocation, suspension, or non-renewal of the short-term rental business license, in accordance with the appeal procedures set forth in §, for three strikes during a rolling twelve-month period.
4. The license will be assessed a strike when the owner, agent, occupant, or guest of the property has been convicted of any violation of the requirements of this chapter or any other city ordinances related to the use of the property as a short-term rental, including

but not limited to noise, trash, parking, litter, , animals at large and when the registered agent of the property is given notice of the strike as set forth herein.

5. For the purpose of determining the total number of strikes, each strike issued upon conviction shall be considered in effect on the date of the original offense and all convictions related to offenses occurring within a single rental contract period shall be considered one strike. In no case shall strikes exceed one per rental contract period.
6. Strikes will re-set upon the transfer of the property.
7. The city will provide notice of each strike to the registered agent of the property as follows:
  - a) First strike: a description of the violation and resultant conviction, and a warning that progressive action shall be taken by the city in the case of further violations.
  - b) Second strike: a description of the violation and resultant conviction, and a warning that the city shall initiate revocation of the rental license in the case of further violations.
  - c) Third strike: a description of the violation and resultant conviction and notice of the initiation of license revocation procedures.
8. Any violation of a noise ordinance that occurs on the property will result in a notice that the owner is strongly encouraged to install noise monitoring, and one strike as set forth in this section.

#### **H. ADDITIONAL REQUIREMENTS FOR SHORT-TERM RENTALS.**

1. All owners and/or agents responsible for the leasing of short-term rentals shall be required to keep the following for city inspection and copying for a period of one year:
  - a) The name, address, and other contact information of each signatory on the rental agreement;
  - b) A copy of the city approved rental regulations summary, signed by each signatory of the rental agreement.
  - c) A document signed by the owner and/or agent responsible for renting the dwelling, certifying the number of persons intended to occupy the dwelling.
  - d) The information required by this section shall be updated by the owner and/or agent for each rental to different tenants or occupants.
2. The owner and/or agent shall provide the following for each person signing a rental agreement as a responsible party for a short-term rental:
  - a) The address of the short-term rental and emergency contact numbers;
  - b) The name and contact information for the owner or designated agent; and
  - c) copy of the parking diagram provided to the city for the property as well as a copy of the city's rules and regulations regarding noise, trash, parking, , animals, litter, surfing, , requirements for special events, maximum occupancy, and golf carts.

3. Each residential dwelling unit may contain only one short term rental. Individual rooms in short term rentals may not be rented under separate contracts at the same time. For example, a single-family home or individual multi-family unit may only be rented as a single short-term rental under one contract.
4. Shall be subject to all applicable provisions of the noise regulations in §§
5. Shall not feature mobile food trucks, carts, or other outdoor retailers offering products for sale or in exchange for donations. Caterers are allowed at events on the premises of short-term rentals.
6. All events held on the premises of a short-term rental shall meet the following requirements:
  - a) May not exceed 25 people; and
  - b) May not include outdoor amplified music, including bands, deejays, music broadcast through speakers and electronic musical instruments.
  - c) These requirements do not apply to events hosted by the owner of the property for which the owner is on site for the duration the event, the owner has completed the required special event notification, and for which no compensation has been paid for the event or the use of the house.



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CURT FREESE  
Community Development  
Director

**To:** City Council  
**From:** Curt Freese, Community Development Director  
**Date:** 10/14/25  
**Issue:** Short Term Rentals

**UPDATE:**

Since the August 19, 2025, City Council Work-session, the STR Ordinance has been updated based on Council's direction and also received an official recommendation from the Planning Commission.

**Revisions since Work-session:**

**1) Clustering of STRS**

Council expressed concern over clustering of multiple STR's on one street or neighborhood.

**Proposed Code:**

C. 4. A Short Term Rental may not be located closer than 300 feet to any other Short Term Rental (measured from property line to property-line).

**Analysis:** Staff found numerous examples around the country of clustering regulations, which either required a distance between STR's or only one STR per block. As many subdivisions in Beaufort do not have traditional blocks, Staff chose the distance requirement. Three hundred feet was selected, as it is the length of a typical downtown Beaufort Block. An analysis of the impact of the 300' distance requirement was prepared by the GIS Analyst, found in this packet. The conclusion is the 300' distance would mimic the 6% cap, and only further restrict the 6% cap in a few neighborhoods.

**2) Equitable Waitlist**



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Community Development  
Director

Council directed Staff to create a waitlist within the proposed ordinance.

**Proposed Code:**

E. 8. r. Wait-List: The City shall maintain a Short Term Rental waitlist for each defined neighborhood. The Waitlist will require the same application procedure as a Short Term Rental. The City shall utilize the wait-list and the next eligible valid Short Term Rental application, in permitting new Short Term Rentals

**Analysis:** The waitlist would be enshrined as a process within the code to ensure that new permitted STR's would be open to any property, and the formal application process would be required to place a property on the waitlist.

**3) Licensing:**

Council directed Staff to remove a separate yearly annual license due in July in the original draft ordinance.

**Proposal:** Ordinance changed to remove the July licensing, and coordination with Finance to attach the license to the business license and send out an affidavit with the business license renewal for Short Term Rentals.

**Planning Commission Recommendation**

The Planning Commission discussed draft changes to Section 3.6.2 Short Term Rentals, Accessory Uses Section 3.11.2, and Carriage Houses/Accessory Dwelling Units Section 4.5.3 at their August and September work-sessions, with a formal unanimous vote for approval of the changes at their September 15, 2025, meeting. The draft changes were proposed after the August regular Planning Commission meeting, in which public discussion on Accessory Dwelling Units and Short Term Rentals was held.



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The recommendation was limited to Section 3.6.2, 3.11, and 4.5.3, and did not include the STR standalone ordinance. Effectively, the requirements for STR's were removed from the Development Code in the recommendation, with the idea they'd be placed in the standalone STR license in the Municipal Code. In addition, the PC limited ADU's from two to one per lot, with the ability to apply for a Special Exception for an additional ADU.

**Owner Occupied Recommendation:** The Planning Commission recommended the additional sentence below in Section 3.6.2, to effectively ban non-owner occupied short term rentals:

“Short term rentals, where the owner does not live on premises, are prohibited.”

**Analysis:** Staff is agnostic on the recommendation of the PC. Should the City Council accept the PC's recommendation, portions of the attached draft STR ordinance must be removed and revised before a public hearing for its adoption is scheduled with City Council.

**BACKGROUND:**

The City Manager tasked City Staff to draft a new standalone short term rental ordinance. The proposed draft ordinance attached, was developed after a number of meetings with the following internal staff group:

Curt Freese, Community Development Director

Alan Eisenman, Finance Director

Justin Rose, Business License Inspector/Administrator

Kat Kirkland, GIS

Christopher Klement, Planner III



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Ken Meola, Code Enforcement Officer

Bruce Skipper, Building Official

John Badget, Fire Marshall

The group reviewed the current ordinance, the current short term rental licenses and policies, inspections, complaints, and staff capacity, with Short Term Rental policies and practices around the State of South Carolina.

The draft ordinance is intended for discussion and is intended to address the aforementioned issues. Staff would note such a standalone ordinance, should it be adopted, therefore requires revisions to the existing requirements of Section 3.6.2 C. 2. of the Development Code. This Section would merely lay out the eligible zoning districts, while all other regulation would be found in the standalone ordinance in the Municipal Code.

**SUMMARY OF DRAFT CODE:**

- Requirements and Eligibility: Compliance: STRs must adhere to the Beaufort Development Code (Section 3.6.2 C 2).
- Grandfathering of existing STR's (if sold, revoked, or expired, grandfathering status is lost).
- Cap on STRs: Limited to 6% of dwelling units in specific zones (T3-S, T3-N, T4-HN, T4-N, T5-UC); prohibited in The Point, LI, IC, RMX, and T-1 zones.
- 300' distance requirement.
- Limit per Lot: One STR per lot for both OSTR and ISTR.
- Accessory Units: Only OSTRs may use accessory dwelling units (e.g., carriage or pool houses) as STRs.
- Minimum Stay: 2 nights.
- Parking: One on-site parking space per bedroom, located to the side or rear, with an improved surface.
- Signs: No on-site signs allowed.
- Fire Safety: Monitored fire alarms required.



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- External Approvals: Written approval from property owners' associations or property management is required for applicable neighborhoods or multifamily structures.
- Safety Inspection: Required before issuing a business license.
- License and Registration: Owners annually renew a business license with an additional affidavit for the STR paying applicable fees and taxes.
- Licenses are issued only to owners, not lessees; a designated agent may apply on behalf of the owner.
- Licenses for units under construction require a certificate of occupancy.
- Failure to maintain good standing or renew within 10 days of license expiration may lead to denial or revocation.
- Registration requires detailed information, including property details, owner/agent contact info, parking plans, and certifications of compliance with city ordinances (e.g., noise, trash, parking).
- Owners must designate a local agent (self or a licensed professional) who can respond to emergencies within 60 minutes.
- Changes in ownership or registration details must be updated within 60 days.

**VIOLATIONS:**

- Violations include operating without a license/permit, false advertising, exceeding permitted occupancy or bedroom counts, hosting large events (>25 people), failing to provide required tenant information, or accumulating three strikes within a 12-month period for ordinance violations (e.g., noise, parking). Strikes reset upon property transfer with no overlapping ownership. Penalties: Fines up to \$500 per violation, with each day considered a separate offense.
- Denial, revocation, suspension, or non-renewal of licenses for non-compliance or three strikes in a 12-month period.
- Noise violations trigger a strike and a recommendation to install noise monitoring.
- Additional Requirements: Owners/agents must retain rental agreement details, signed city regulation summaries, and occupant certifications for one year.
- Tenants must receive property details, emergency contacts, parking diagrams, and city ordinance summaries.
- STRs are limited to one rental contract per dwelling unit at a time.



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- Events are capped at 25 people with no outdoor amplified music, except for owner-hosted, non-compensated events with proper notification.
- Mobile food trucks or outdoor retail are prohibited, though catering is allowed.

**RECOMMENDATION:**

This item is intended for discussion and Council direction, specifically on whether or not Council favors the proposed changes and if the Council agrees with the PC's recommendation for only owner occupied STR's.

# Short Term Rentals Density GIS Analysis

## **Purpose:**

To model potential density of short-term rentals under the proposed ordinance.

## **Procedure:**

The analysis began by determining each parcel's eligibility based on zoning and neighborhood. Parcels were chosen as the unit of analysis due to the proposed ordinance specifying one rental per lot. Counts in this analysis are of parcels, not rental units. Existing pending and active short-term rentals will be considered legacy and not subject to new spacing and eligibility requirements unless the property ownership changes. For this reason, these Legacy short-term rentals will be treated as one rental even if there are multiple units on the parcel.

Data for the analysis comes from the City of Beaufort GIS layers.

### Zoning:

[https://services9.arcgis.com/NpTdr5u1ft9aY31O/arcgis/rest/services/City\\_of\\_Beaufort\\_Zoning/FeatureServer](https://services9.arcgis.com/NpTdr5u1ft9aY31O/arcgis/rest/services/City_of_Beaufort_Zoning/FeatureServer)

### Neighborhood:

[https://services9.arcgis.com/NpTdr5u1ft9aY31O/arcgis/rest/services/City\\_of\\_Beaufort\\_Neighborhoods/FeatureServer](https://services9.arcgis.com/NpTdr5u1ft9aY31O/arcgis/rest/services/City_of_Beaufort_Neighborhoods/FeatureServer)

### Short Term Rentals:

[https://services9.arcgis.com/NpTdr5u1ft9aY31O/arcgis/rest/services/Short\\_Term\\_Rentals\\_CoB/FeatureServer](https://services9.arcgis.com/NpTdr5u1ft9aY31O/arcgis/rest/services/Short_Term_Rentals_CoB/FeatureServer)

Because not all zoning classifications were specifically mentioned in the draft ordinance, parcels were categorized into three groups based on eligibility: Allowed, Prohibited, or Not Specified. For the density analysis, Allowed and Not Specified parcels were considered as eligible. Eligibility was not affected by the presence or absence of structures.

Figure 1 shows parcel eligibility based on specified zoning classification. Figure 2 shows the definitions of each eligibility category. Figure 3 shows the eligibility of Legacy Short Term Rentals under the proposed ordinance.

# Short Term Rental Eligibility

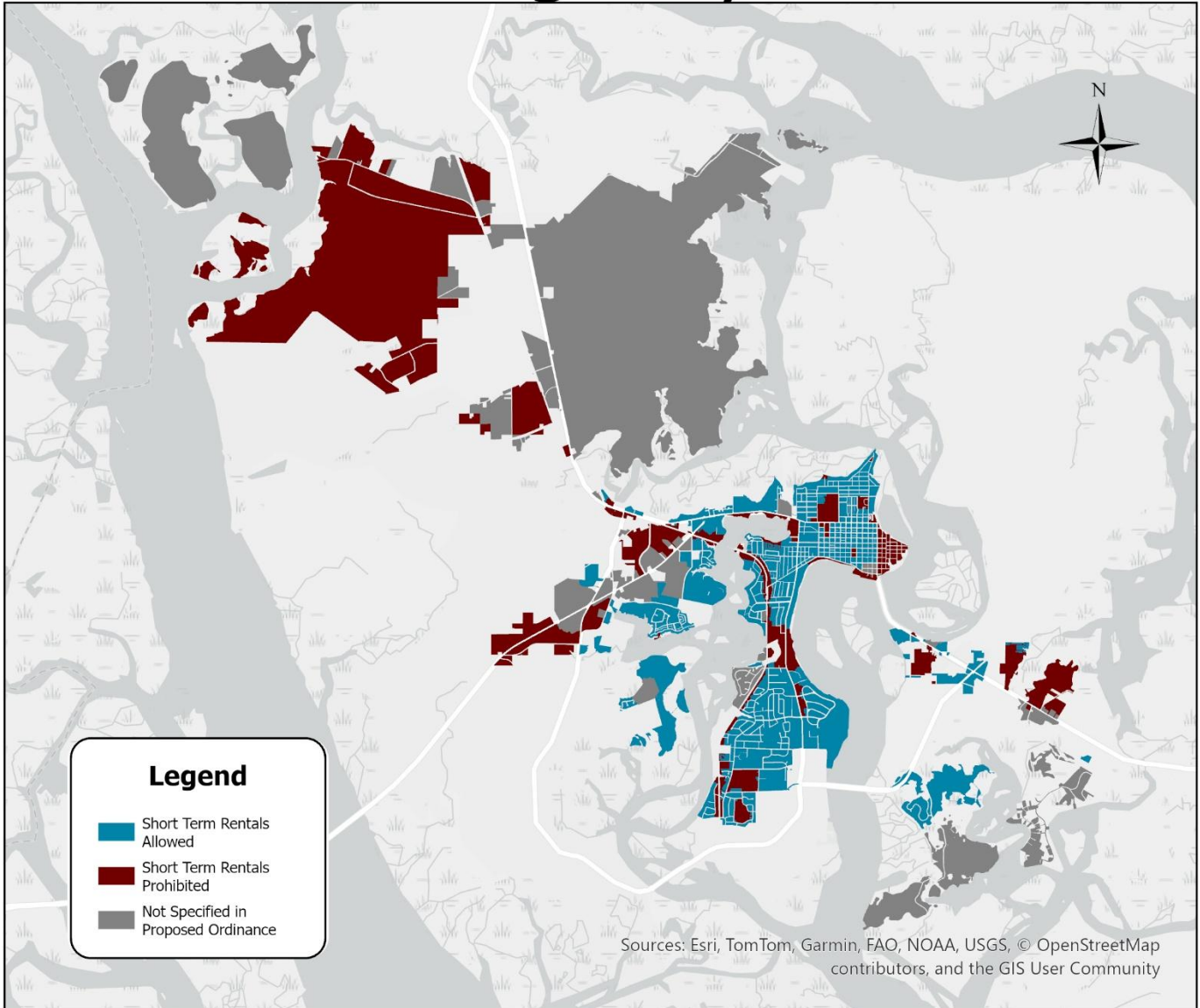


Figure 1: Parcel Eligibility

|   |  |  |
|---|--|--|
| Short Term Rentals Permitted:<br>T3-N<br>T3-S<br>T4-HN<br>T4-N<br>T5-UC | Short Term Rentals Prohibited:<br>IC<br>LI<br>RMX<br>T-1<br><br>The Point Neighborhood | Not Specified in Ordinance:<br>LPUD<br>MR<br>T4-NA<br>T5-DC<br>T5-UC/RMX |
|---|--|--|

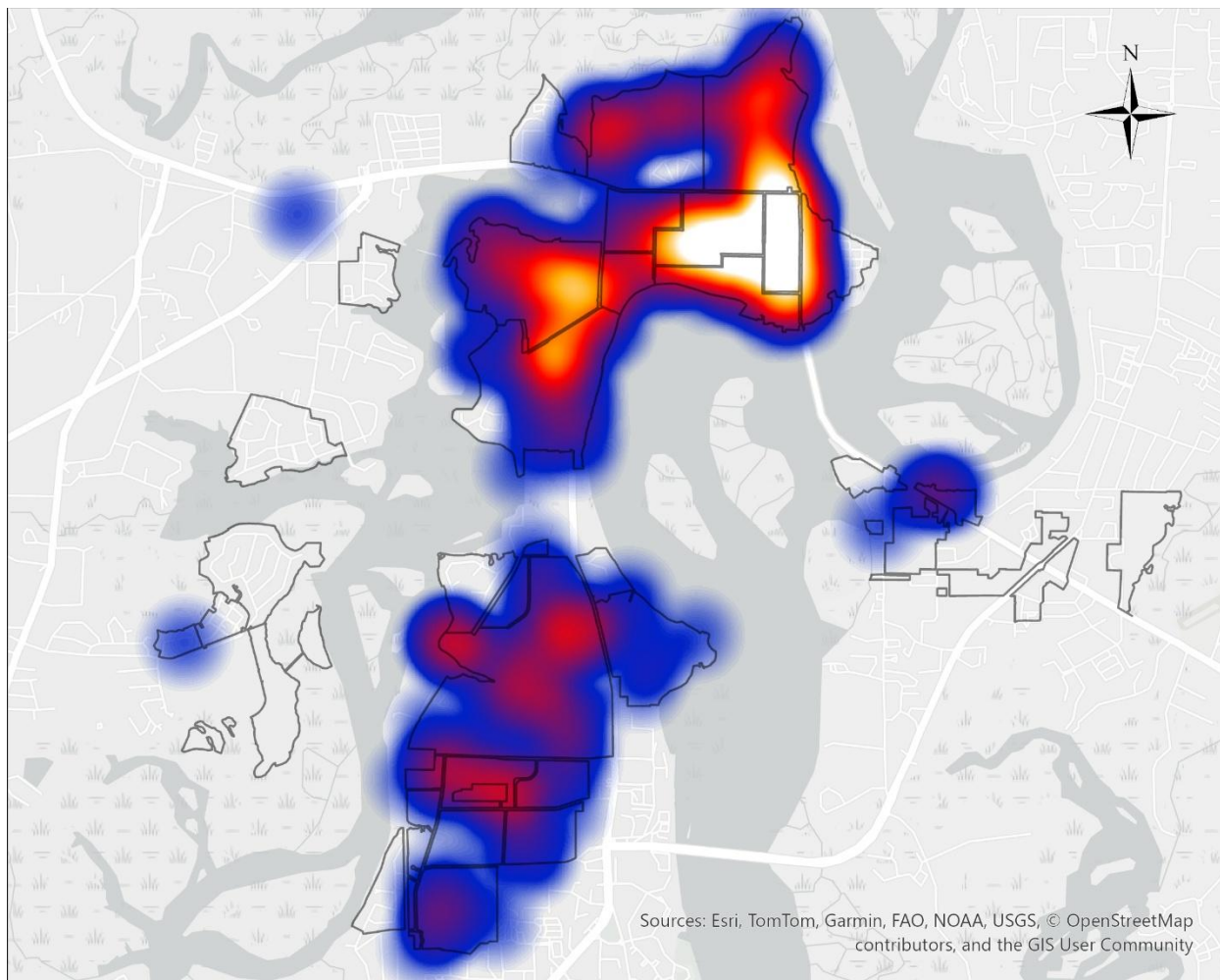
Figure 2: (Above) Eligibility classifications

| Current STR   |         |       |
|---------------|---------|-------|
| Eligibility   | Status  | Count |
| Not Specified | active  | 13    |
| Not Specified | pending | 1     |
| No            | active  | 13    |
| No            | pending | 2     |
| Yes           | active  | 223   |
| Yes           | pending | 20    |

Figure 3: (Right) Eligibility of Legacy Short Term Rentals

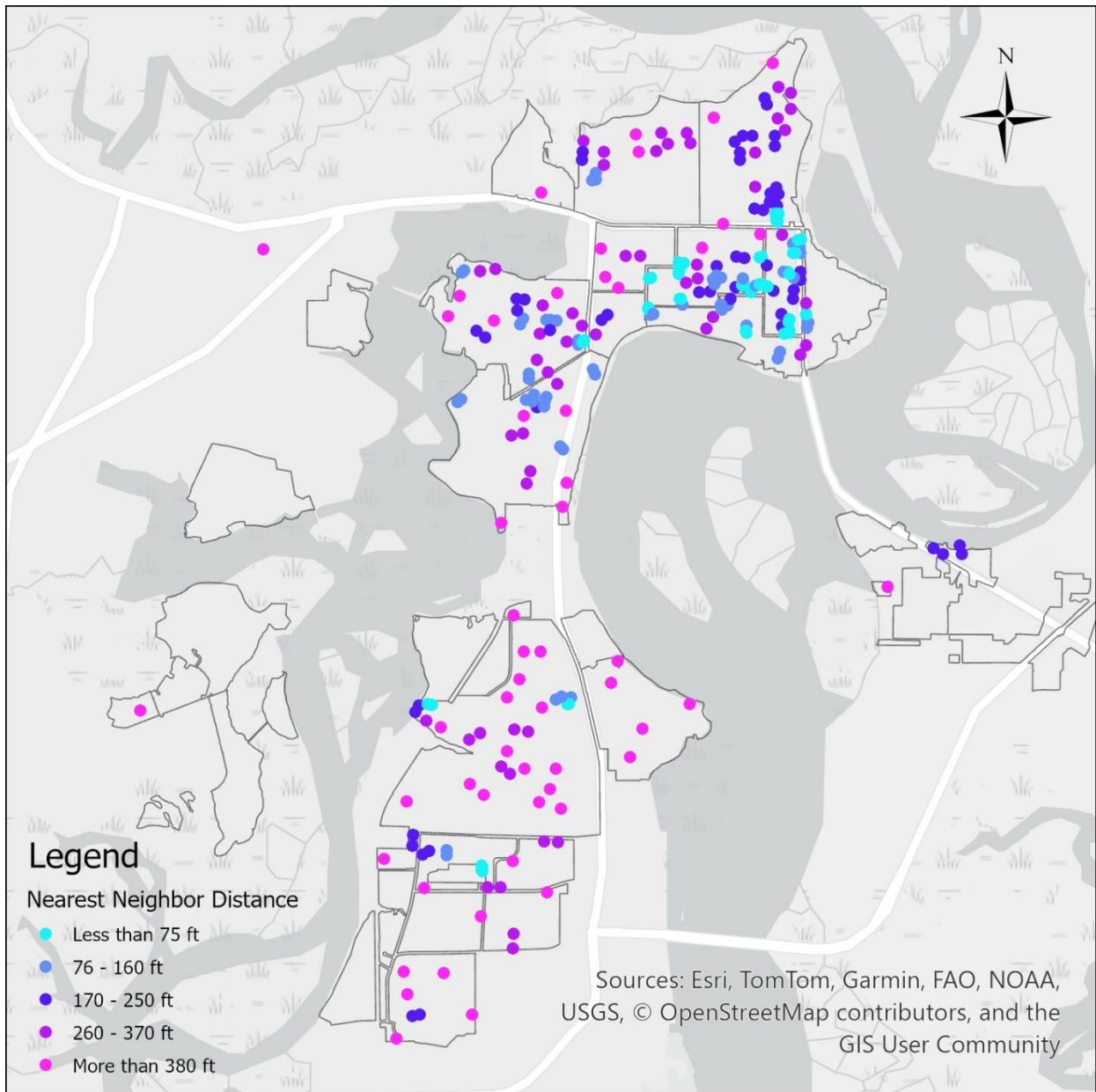
Density analysis was performed on existing short-term rentals to identify clustering.

## Current Short Term Rentals Heat Map



Existing short-term rentals are represented by address points. The heatmap shows that the density of short-term rentals is focused on the historic downtown area. A near table was generated to find the nearest neighbor to each rental unit. Rental units were divided into five classes, each with 54–55 units, based on proximity to the nearest other unit.

# Near Distances for Current Pending and Active Short-Term Rentals



To address clustering of rental units, suggested spacing requirements were modeled. Spacing is measured from parcel edge to parcel edge and was modeled at four distances: 300ft, 200ft, 150ft, and 100ft.

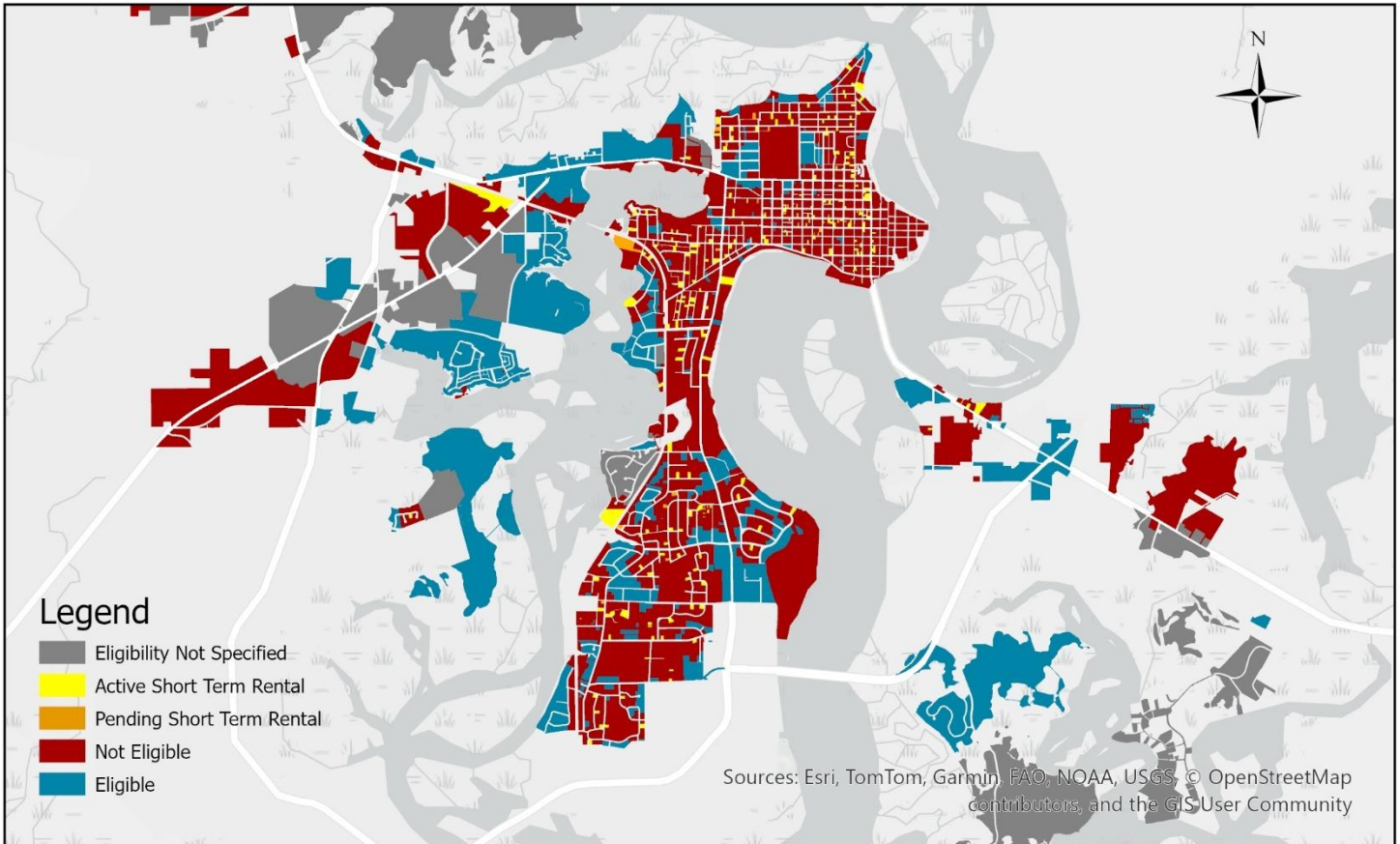
The density analysis includes both current short-term rentals and potential new rentals under the proposed spacing requirements. Because existing rentals were not originally subject to spacing rules, some are located closer together than the proposed standards would allow. These legacy rentals will be permitted to continue operating. As a result, the modeled density maps reflect a higher concentration of rentals than would occur if only potential rentals were considered.

For each distance, the following components were created:

- A map showing parcel eligibility adjusted to include distance from active and pending Short Term Rentals.
- A map showing the modeled maximum capacity for the given distance, including legacy short-term rentals.
- A table showing counts for parcels, short-term rentals, and the 6% cap for each neighborhood for comparison.

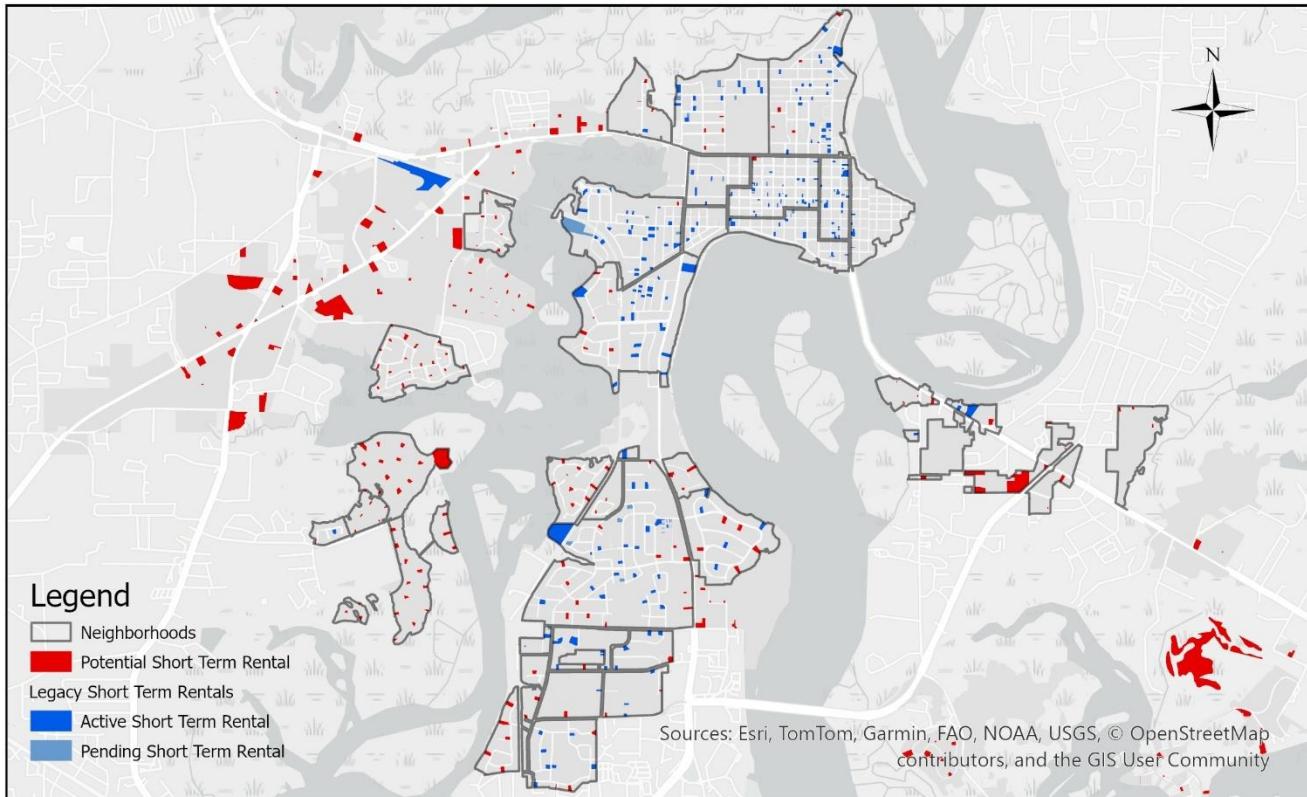
Maximum capacity is based on a mathematical model and is unlikely to be exactly reproduced in practice. The highlighted parcels show one possible configuration of the maximum number of short-term rentals allowed under the spacing requirements. Other parcels could be used instead, and inclusion on the map does not indicate that a parcel will actually operate as a short-term rental.

# 300 Ft Spacing Model Eligibility



*Eligibility based on defined requirements and 300 ft spacing parcel edge to parcel edge from existing Short Term Rentals.*

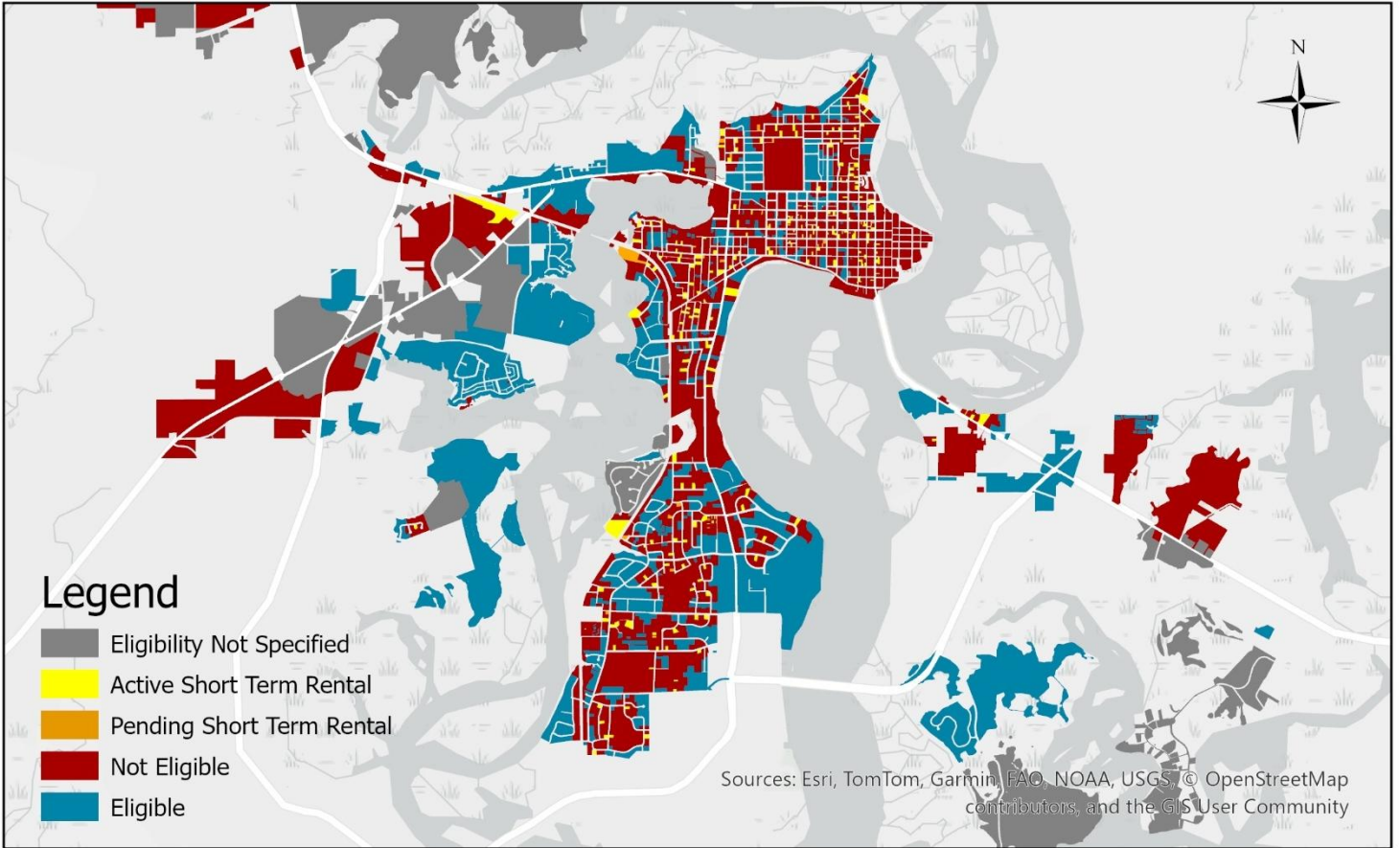
# 300 ft Spacing Model



*Maximum density of Short Term Rentals with 300 ft parcel to parcel spacing and including legacy Short Term Rentals.*

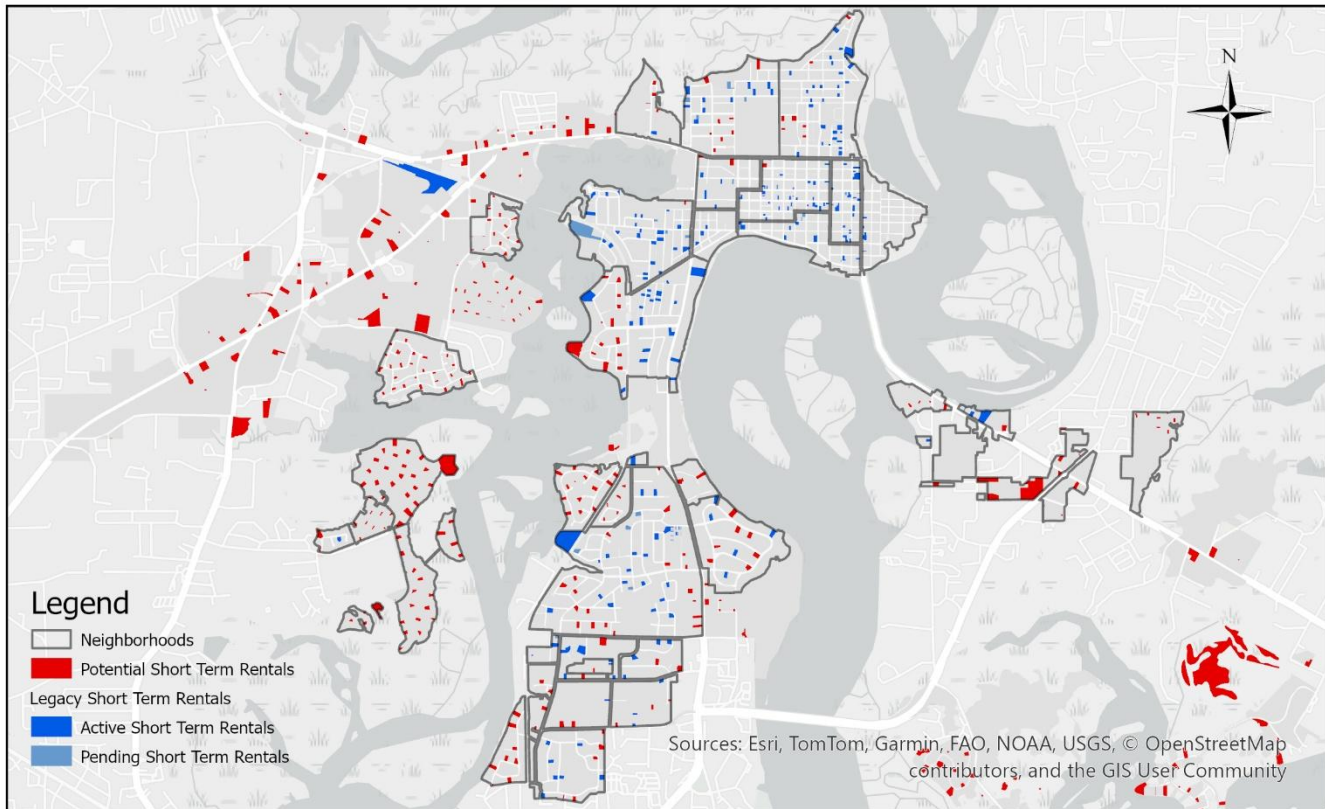
| Neighborhood              | Parcel Count | Cap Limit | Active STR | Pending STR | Legacy STR Total | Potential New SRT | Total |
|---------------------------|--------------|-----------|------------|-------------|------------------|-------------------|-------|
| Battery Point             | 294          | 18        | 0          | 0           | 0                | 18                | 18    |
| Battery Shores            | 194          | 12        | 0          | 0           | 0                | 16                | 16    |
| Boundary Street           | 117          | 7         | 1          | 0           | 1                | 6                 | 7     |
| Broad Street              | 81           | 5         | 3          | 1           | 4                | 1                 | 5     |
| Cottage Farm              | 120          | 7         | 1          | 0           | 1                | 9                 | 10    |
| Dixon Village             | 134          | 8         | 4          | 1           | 5                | 1                 | 6     |
| Higginsonville            | 273          | 16        | 11         | 4           | 15               | 7                 | 22    |
| Hundred Pines             | 368          | 22        | 23         | 0           | 23               | 6                 | 29    |
| Islands of Beaufort       | 202          | 12        | 0          | 0           | 0                | 19                | 19    |
| Jerico Woods              | 127          | 8         | 0          | 0           | 0                | 5                 | 5     |
| Lady's Island             | 272          | 16        | 3          | 1           | 4                | 20                | 24    |
| Live Oaks                 | 148          | 9         | 0          | 0           | 0                | 8                 | 8     |
| Mossy Oaks                | 749          | 45        | 23         | 1           | 24               | 19                | 43    |
| Northwest Quadrant        | 448          | 27        | 34         | 2           | 36               | 1                 | 37    |
| Old Commons               | 211          | 13        | 24         | 2           | 26               | 0                 | 26    |
| Overlook at Battery Creek | 142          | 9         | 0          | 0           | 0                | 7                 | 7     |
| Pigeon Point              | 645          | 39        | 30         | 0           | 30               | 5                 | 35    |
| Royal Oaks                | 758          | 45        | 23         | 5           | 28               | 18                | 46    |
| Spanish Point             | 181          | 11        | 5          | 0           | 5                | 8                 | 13    |
| Stone Marten              | 34           | 2         | 1          | 0           | 1                | 1                 | 2     |
| The Bluff                 | 206          | 12        | 12         | 1           | 13               | 0                 | 13    |
| The Glebe                 | 75           | 4         | 3          | 0           | 3                | 0                 | 3     |
| The Point                 | 205          | 0         | 6          | 0           | 6                | 0                 | 6     |
| West End                  | 431          | 26        | 28         | 4           | 32               | 1                 | 33    |

# 200 ft Spacing Model Eligibility



*Eligibility based on defined requirements and 200 ft spacing parcel edge to parcel edge from existing Short Term Rentals.*

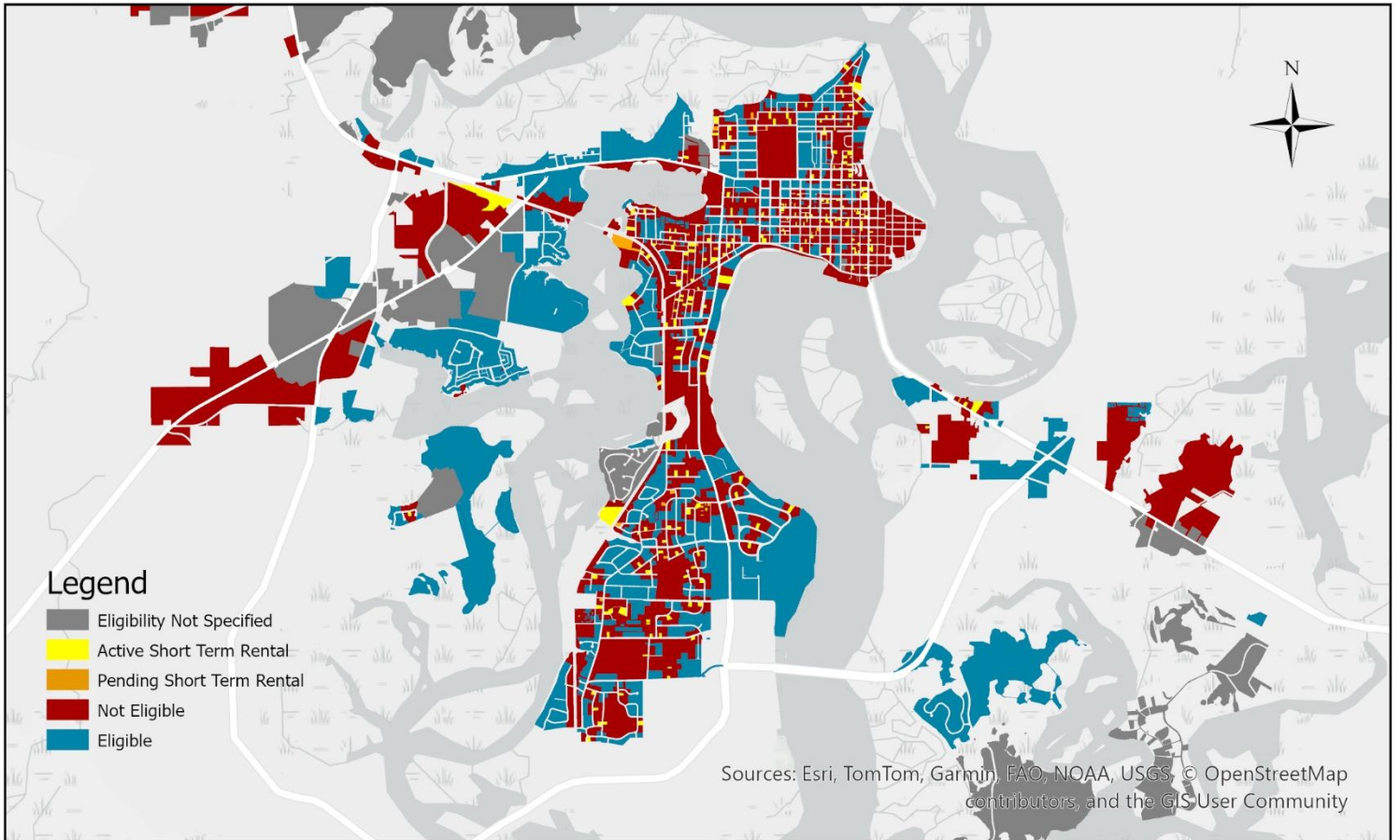
# 200 ft Spacing Model



Maximum density of Short Term Rentals with 200 ft parcel to parcel spacing and including legacy Short Term Rentals.

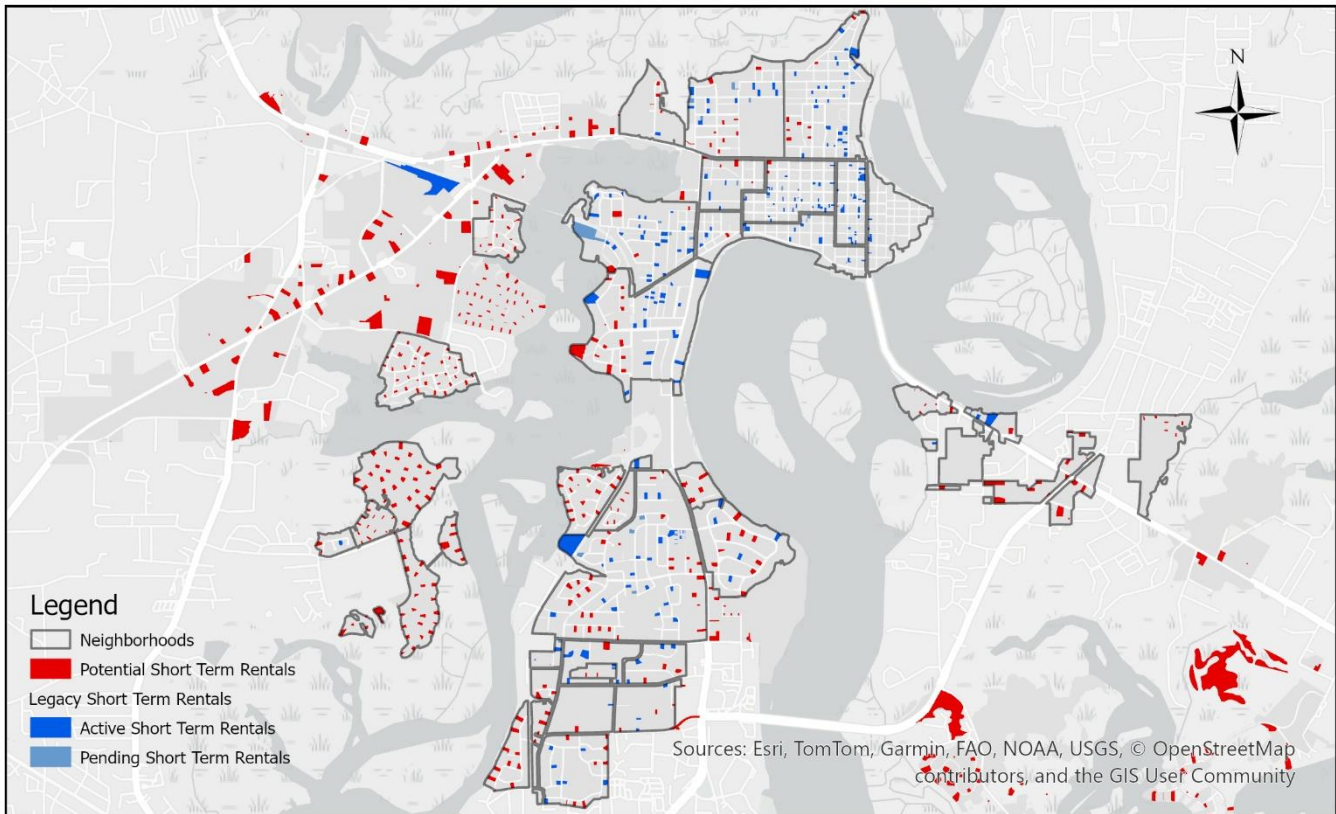
| Neighborhood              | Parcel Count | Cap Limit | Active STR | Pending STR | Legacy STR Total | Potential New SRT | Total |
|---------------------------|--------------|-----------|------------|-------------|------------------|-------------------|-------|
| Battery Point             | 294          | 18        | 0          | 0           | 0                | 27                | 27    |
| Battery Shores            | 194          | 12        | 0          | 0           | 0                | 26                | 26    |
| Boundary Street           | 117          | 7         | 1          | 0           | 1                | 6                 | 7     |
| Broad Street              | 81           | 5         | 3          | 1           | 4                | 2                 | 6     |
| Cottage Farm              | 120          | 7         | 1          | 0           | 1                | 14                | 15    |
| Dixon Village             | 134          | 8         | 4          | 1           | 5                | 4                 | 9     |
| Higginsonville            | 273          | 16        | 11         | 4           | 15               | 13                | 28    |
| Hundred Pines             | 368          | 22        | 23         | 0           | 23               | 13                | 36    |
| Islands of Beaufort       | 202          | 12        | 0          | 0           | 0                | 25                | 25    |
| Jerico Woods              | 127          | 8         | 0          | 0           | 0                | 8                 | 8     |
| Lady's Island             | 272          | 16        | 3          | 1           | 4                | 26                | 30    |
| Live Oaks                 | 148          | 9         | 0          | 0           | 0                | 15                | 15    |
| Mossy Oaks                | 749          | 45        | 23         | 1           | 24               | 29                | 53    |
| Northwest Quadrant        | 448          | 27        | 34         | 2           | 36               | 1                 | 37    |
| Old Commons               | 211          | 13        | 24         | 2           | 26               | 0                 | 26    |
| Overlook at Battery Creek | 142          | 9         | 0          | 0           | 0                | 10                | 10    |
| Pigeon Point              | 645          | 39        | 30         | 0           | 30               | 7                 | 37    |
| Royal Oaks                | 758          | 45        | 23         | 5           | 28               | 25                | 53    |
| Spanish Point             | 181          | 11        | 5          | 0           | 5                | 9                 | 14    |
| Stone Marten              | 34           | 2         | 1          | 0           | 1                | 2                 | 3     |
| The Bluff                 | 206          | 12        | 12         | 1           | 13               | 0                 | 13    |
| The Glebe                 | 75           | 4         | 3          | 0           | 3                | 1                 | 4     |
| The Point                 | 205          | 0         | 6          | 0           | 6                | 0                 | 6     |
| West End                  | 431          | 26        | 28         | 4           | 32               | 2                 | 34    |

# 150 ft Spacing Model Eligibility



*Eligibility based on defined requirements and 150 ft spacing parcel edge to parcel edge from existing Short Term Rentals.*

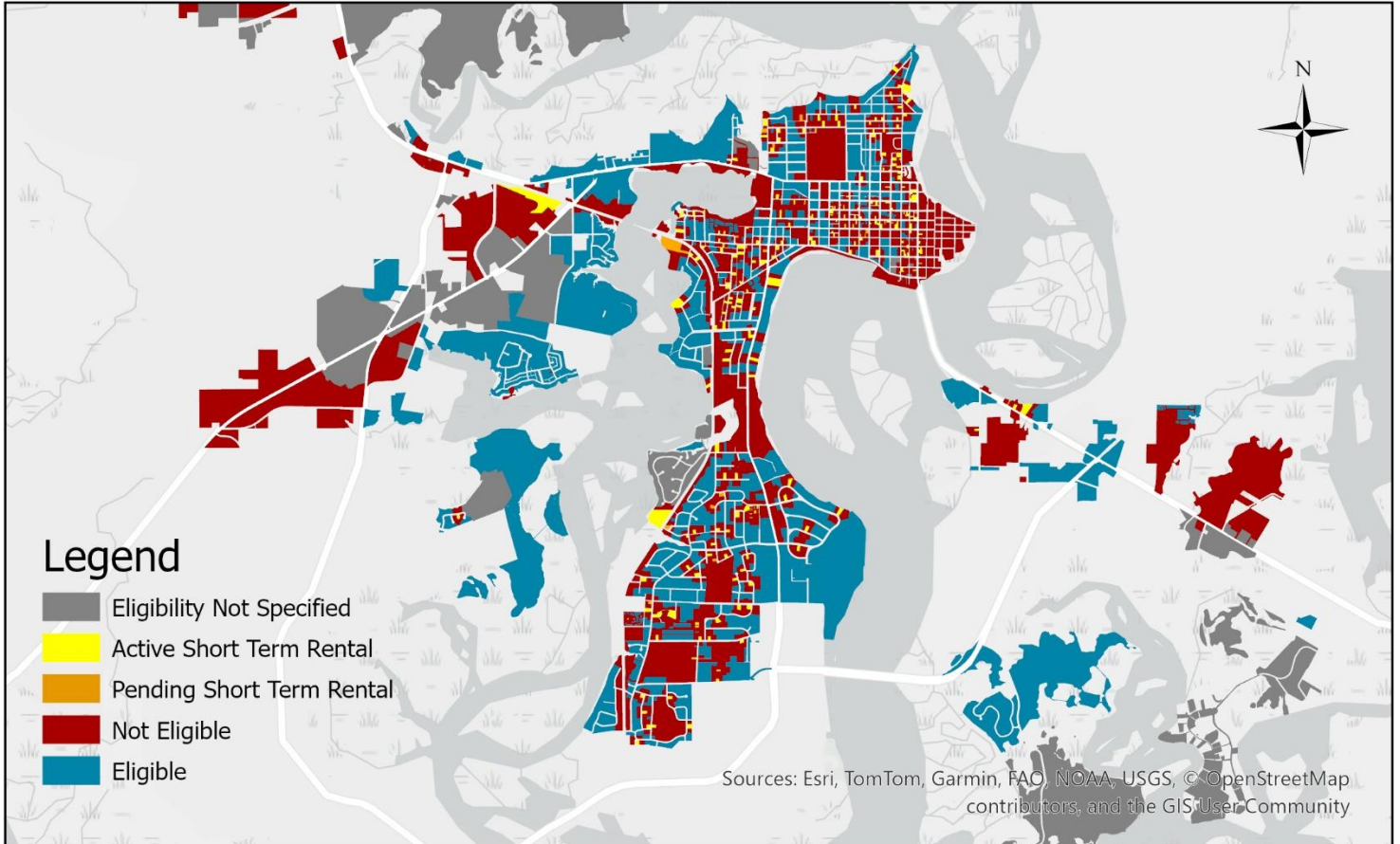
# 150 ft Spacing Model



Maximum density of Short Term Rentals with 300 ft parcel to parcel spacing and including legacy Short Term Rentals.

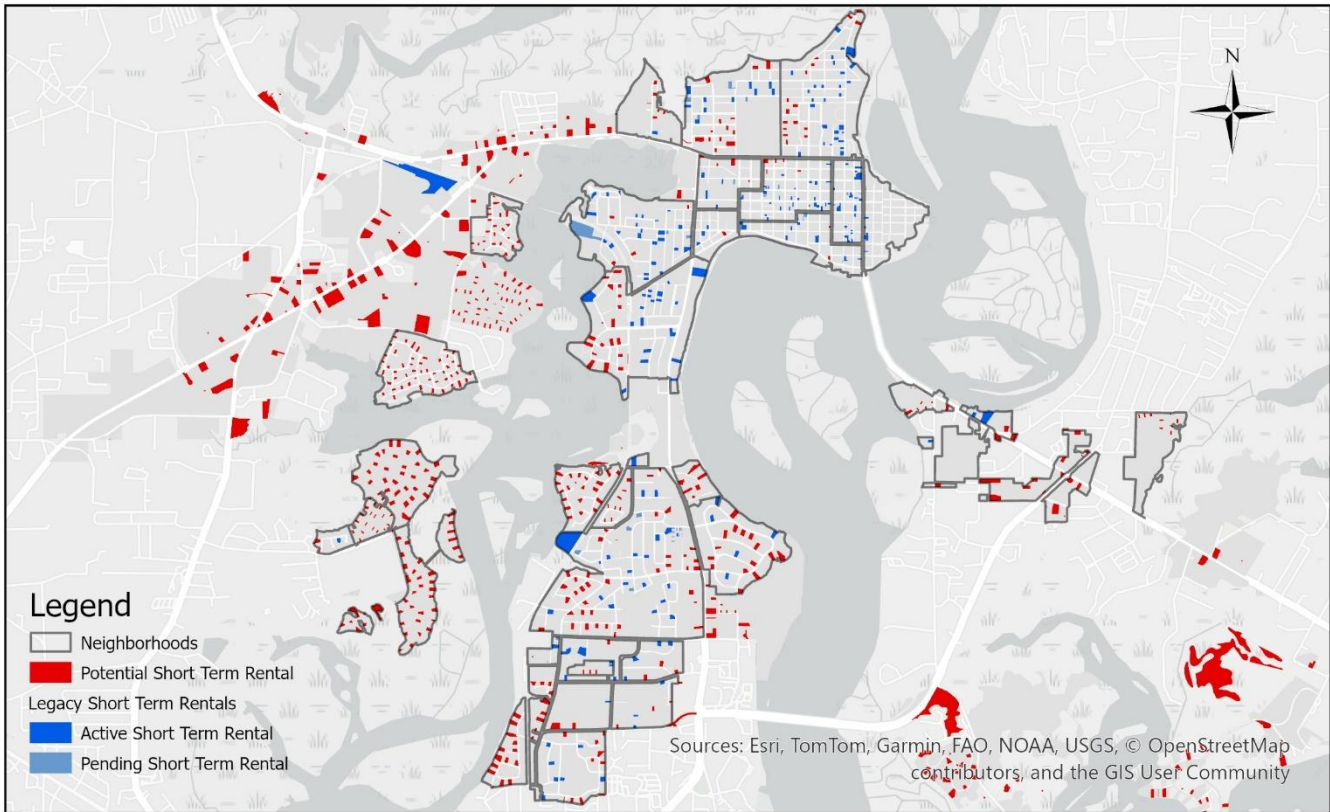
| Neighborhood              | Parcel Count | Cap Limit | Active STR | Pending STR | Legacy STR Total | Potential New SRT | Total |
|---------------------------|--------------|-----------|------------|-------------|------------------|-------------------|-------|
| Higginsonville            | 273          | 16        | 11         | 4           | 15               | 16                | 31    |
| Dixon Village             | 134          | 8         | 4          | 1           | 5                | 6                 | 11    |
| The Glebe                 | 75           | 4         | 3          | 0           | 3                | 2                 | 5     |
| Northwest Quadrant        | 448          | 27        | 34         | 2           | 36               | 2                 | 38    |
| Old Commons               | 211          | 13        | 24         | 2           | 26               | 0                 | 26    |
| The Point                 | 205          | 0         | 6          | 0           | 6                | 0                 | 6     |
| West End                  | 431          | 26        | 28         | 4           | 32               | 6                 | 38    |
| Live Oaks                 | 148          | 9         | 0          | 0           | 0                | 18                | 18    |
| Battery Point             | 294          | 18        | 0          | 0           | 0                | 37                | 37    |
| Hundred Pines             | 368          | 22        | 23         | 0           | 23               | 15                | 38    |
| Battery Shores            | 194          | 12        | 0          | 0           | 0                | 30                | 30    |
| Overlook at Battery Creek | 142          | 9         | 0          | 0           | 0                | 17                | 17    |
| Islands of Beaufort       | 202          | 12        | 0          | 0           | 0                | 35                | 35    |
| Cottage Farm              | 120          | 7         | 1          | 0           | 1                | 17                | 18    |
| Jerico Woods              | 127          | 8         | 0          | 0           | 0                | 7                 | 7     |
| Spanish Point             | 181          | 11        | 5          | 0           | 5                | 13                | 18    |
| Royal Oaks                | 758          | 45        | 23         | 5           | 28               | 37                | 65    |
| Broad Street              | 81           | 5         | 3          | 1           | 4                | 2                 | 6     |
| Mossy Oaks                | 749          | 45        | 23         | 1           | 24               | 39                | 63    |
| Pigeon Point              | 645          | 39        | 30         | 0           | 30               | 9                 | 39    |
| The Bluff                 | 206          | 12        | 12         | 1           | 13               | 0                 | 13    |
| Stone Marten              | 34           | 2         | 1          | 0           | 1                | 2                 | 3     |
| Lady's Island             | 272          | 16        | 3          | 1           | 4                | 30                | 34    |
| Boundary Street           | 117          | 7         | 1          | 0           | 1                | 6                 | 7     |

# 100 ft Spacing Model Eligibility



*Eligibility based on defined requirements and 100 ft spacing parcel edge to parcel edge from existing Short Term Rentals.*

# 100 ft Spacing Model



Maximum density of Short Term Rentals with 300 ft parcel to parcel spacing and including legacy Short Term Rentals.

| Neighborhood              | Parcel Count | Cap Limit | Active STR | Pending STR | Legacy STR Total | Potential New SRT | Total |
|---------------------------|--------------|-----------|------------|-------------|------------------|-------------------|-------|
| Higginsonville            | 273          | 16        | 11         | 4           | 15               | 14                | 29    |
| Dixon Village             | 134          | 8         | 4          | 1           | 5                | 4                 | 9     |
| The Glebe                 | 75           | 4         | 3          | 0           | 3                | 1                 | 4     |
| Northwest Quadrant        | 448          | 27        | 34         | 2           | 36               | 5                 | 41    |
| Old Commons               | 211          | 13        | 24         | 2           | 26               | 1                 | 27    |
| The Point                 | 205          | 0         | 6          | 0           | 6                | 0                 | 6     |
| West End                  | 431          | 26        | 28         | 4           | 32               | 6                 | 38    |
| Live Oaks                 | 148          | 9         | 0          | 0           | 0                | 25                | 25    |
| Battery Point             | 294          | 18        | 0          | 0           | 0                | 50                | 50    |
| Hundred Pines             | 368          | 22        | 23         | 0           | 23               | 20                | 43    |
| Battery Shores            | 194          | 12        | 0          | 0           | 0                | 39                | 39    |
| Overlook at Battery Creek | 142          | 9         | 0          | 0           | 0                | 23                | 23    |
| Islands of Beaufort       | 202          | 12        | 0          | 0           | 0                | 43                | 43    |
| Cottage Farm              | 120          | 7         | 1          | 0           | 1                | 22                | 23    |
| Jerico Woods              | 127          | 8         | 0          | 0           | 0                | 9                 | 9     |
| Spanish Point             | 181          | 11        | 5          | 0           | 5                | 17                | 22    |
| Royal Oaks                | 758          | 45        | 23         | 5           | 28               | 46                | 74    |
| Broad Street              | 81           | 5         | 3          | 1           | 4                | 3                 | 7     |
| Mossy Oaks                | 749          | 45        | 23         | 1           | 24               | 48                | 72    |
| Pigeon Point              | 645          | 39        | 30         | 0           | 30               | 16                | 46    |
| The Bluff                 | 206          | 12        | 12         | 1           | 13               | 2                 | 15    |
| Stone Marten              | 34           | 2         | 1          | 0           | 1                | 3                 | 4     |
| Lady's Island             | 272          | 16        | 3          | 1           | 4                | 37                | 41    |
| Boundary Street           | 117          | 7         | 1          | 0           | 1                | 8                 | 9     |

## **Conclusions:**

The assumption that a percentage cap based on number of parcels would prevent clustering of short-term rentals is not accurate. In practice, there are several areas where units are clustered closely together.

300 ft spacing is the closest to mimicking the 6% neighborhood cap. There are a few neighborhoods that would exceed the cap based solely on spacing requirements. However, there are several neighborhoods that exceed the cap based on legacy short term rentals where no additional rentals would be allowed based on spacing. There are neighborhoods that will not be able to reach a 6% ratio of rentals with a 300ft parcel edge to parcel edge spacing requirement.

Since short term rental licenses will be tied to property ownership and forfeit in the case of a change in ownership, it is anticipated that clusters will eventually be reduced with the introduction of spacing requirements.