



**Accommodations Tax Advisory Committee**

11:00 a.m., Wednesday, November 8, 2023

1207 Palm Boulevard

City Hall Council Chambers

**Public Comment:**

Citizens may provide written public comment here:

<https://www.iop.net/public-comment-form>

**Agenda**

1. **Call to order** and acknowledgment that the press and the public have been duly notified of the meeting in accordance with the Freedom of Information Act.
2. **Approval of previous meeting's minutes** – October 5, 2023
3. **Financial Statements** – Finance Director Debra Hamilton
4. **Old Business** – None
5. **New Business**
  - a. Approval of FY23 over budget expenditures:
    - Irrigation at Breach Inlet message board - \$338
    - Public Works F-150 replacement truck - \$3,439
    -
  - b. Presentations of new applications for second round funding for accommodations tax funds in FY24
6. **Miscellaneous**

Next meeting date:
7. **Adjournment**



## **ACCOMMODATIONS TAX ADVISORY COMMITTEE**

**11:00am, Thursday, October 5, 2023  
1207 Palm Boulevard, Isle of Palms, SC**

### **MINUTES**

#### **1. Call to order**

**Present:** Chas Akers, Doug Truslow, Ray Burns, Barb Bergwerf, Rebecca Kovalich, Chrissy Lorenz

**Absent:** Gloria Clarke

**Staff Present:** Administrator Fragoso, Treasurer Hamilton

#### **2. Approval of previous meeting's minutes – May 16, 2023**

Ms. Bergwerf made a motion to approve the minutes of the May 16, 2023 meeting, and Ms. Lorenz seconded the motion. The motion passed unanimously.

#### **3. Financial Statements**

Treasurer Hamilton reported that the unaudited balance of the ATAX account at the end of FY23 was \$4.1 million with revenues of \$3.6 million versus a budget of \$2.6 million. Expenses for FY23 were as budgeted except for the amount due to the CVB since that amount is in correlation to the monies received by the City. Total expenditures for FY23 were \$2.4 million versus a budget of \$2.7 million.

The account balance as of 8/31/23 is \$4.1 million. Only \$44,000 in expenses have been realized so far in FY24 and the account has earned \$34,000 in interest income.

Administrator Fragoso said an FY23 budget overage of \$3,439 for the Public Works truck will be voted on at the next meeting.

#### **4. Old Business**

#### **5. New Business**

##### **A. Presentation from Charleston Visitors Bureau of the City's FY23 expenditures of 30% tourism promotion**

Catherine Dority and Chris Campbell of the CVB gave a brief report on the media expenditures in FY23. The complete FY23 audited budget will be available after the audit is completed in November. Mr. Campbell explained that "36% of revenue in the approved budget for FY23 was allocated to IOP-specific initiatives, and we are pleased to report that the actual year-end report, the number ended up being for expenditures specific to IOP 41%."

Ms. Dority pointed out the larger IOP specific, media-related expenditures including \$147,541 for website optimization, \$44,000 for the VRBO campaign, and \$157,000 for Instagram and Facebook. There were no IOP-specific print ads. Mr. Burns asked for a list of the keywords that are used to optimize IOP.

Ms. Dority reported that the Facebook/Instagram posts garnered 373,000 click-throughs at an average cost of \$0.42/click. The paid ad on TikTok has generated over 6 million views since last October, and the VRBO campaign generated almost \$4 million worth of booked room nights.

**B. Discussion and consideration of request from the IOP Chamber of Commerce for funding for the “Light Up Front Beach” Project**

Mr. Ryan Buckhannon of the IOP Chamber of Commerce came before the Committee requesting a \$10,000 grant to offset the costs of adding to the current “Light Up Front Beach” project. The additional lights be hung on the landward side of Ocean Boulevard in front of the trees and up 14<sup>th</sup> Avenue to the County Park. The Chamber spent \$25,000 on the original installation of lights.

Mr. Buckhannon said they have spoken with numerous Public Safety officials and members of the Turtle Team to ensure these lights will not be disruptive to the turtles. The Chamber pays for quarterly maintenance of the lights and hopes to have these new lights up before the holiday lights are put up. Electricity for these lights is paid through tourism funds.

Mr. Burns noted that a modified application is needed reflecting the proper placement of these new lights. Mr. Burns said that he researched whether something like this would qualify as an ATAX expenditure, and he believes that it is.

Administrator Fragoso explained, “There is a guideline that is prepared by the Tourism Expenditure Review Committee that we have, and it specifically says that they may approve the installation, maintenance, and operation of lighting and landscaping where the Committee believes it promotes travel and tourism. So that document specifies lighting and landscaping.”

Administrator Fragoso also explained that this application was received outside of the newly enacted application guidelines, but she presented Mr. Burns with the application and he decided it could be on the agenda for the meeting.

Mr. Truslow expressed concern that Mr. Buckhannon was applying for this grant outside of the application process. Administrator Fragoso said, “When we were going through the budget process, the Committee approved a budget of \$50,000 for programs, events, and activities that would be eligible under this provision because you all wanted to maintain some flexibility and the ability to take on requests throughout the year as they may come.” There is still \$40,000 in this part of the budget to be allocated should the Committee vote to do so.

She added that there are guidelines surrounding the application process, not laws, and the Committee is allowed to consider and recommend applications at any time. Mr. Truslow and Ms. Bergwerf said they know of people who did not apply for funds because they thought the

deadline had passed. Mr. Truslow is concerned that voting on this now will set a precedent. Mr. Burns did not feel it will set a precedent.

Mr. Akers said he sees this light display much like an art installation, and since the Chamber is paying for most of the lighting, he does not see a reason why the application should be considered.

**MOTION: Ms. Bergwerf made a motion to accept and recommend the application from the Isle of Palms Chamber of Commerce in the amount of \$10,000. Mr. Akers seconded the motion. A vote was taken as follows:**

Ayes: Bergwerf, Akers, Lorenz, Kovalich, Burns

Nays: Truslow

**The motion passed.**

Prior to voting, Ms. Kovalich said that while she supports the beautification of the island, she is not in favor of not following the rules set forth by the Committee.

The Committee then discussed the possibility of opening up the application process again for FY24 as there is still money left to be awarded. Administrator Fragoso will advertise that the Committee will be accepting new applications for FY24 and those applications will be reviewed in November. The Committee would like to have unused grant funds rolled over into the next fiscal year.

**C. Report of schedule for FY25 State ATAX Grant applications**

Mr. Akers would like language added to the schedule that considers another round of funding halfway through the year if not all funds are awarded at the beginning of the year. Administrator Fragoso said she will add “if funds are available, the Committee may consider opening up a second round of funding” to the application guidelines.

**6. Miscellaneous Business**

The next meeting of the ATAX Committee will be Wednesday, November 8, 2023.

**7. Adjournment**

Ms. Bergwerf made a motion to adjourn, and Mr. Burns seconded the motion. The meeting was adjourned at 12:06pm.

Respectfully submitted,

Nicole DeNeane  
City Clerk

**City of Isle of Palms**  
**State Accommodations Tax**  
**Balance Sheet**  
**as of September 30, 2023**

	9/30/2022	9/30/2023
CASH @ TRUIST	\$ 184,842	\$ 23,473
CASH @ SC LOCAL GOVERNMENT INVESTMENT POOL	2,533,430	4,425,116
ACCOUNTS RECEIVABLE	-	7,110
AMOUNTS DUE FROM OTHER FUNDS	<u>-</u>	<u>-</u>
TOTAL ASSETS	<u>2,718,273</u>	<u>4,455,700</u>
ACCOUNTS PAYABLE	5,333	(1,667)
AMOUNTS DUE TO OTHER FUNDS	<u>-</u>	<u>359,404</u>
TOTAL LIABILITIES	<u>5,333</u>	<u>357,737</u>
FUND BALANCE Beginning	2,913,157	4,154,059
Excess Revenues Over/(Under) Expenditures	(200,217)	(56,096)
FUND BALANCE	<u>2,712,939</u>	<u>4,097,963</u>
TOTAL LIABILITIES & FUND BALANCE	<u>\$ 2,718,273</u>	<u>\$ 4,455,700</u>

**City of Isle of Palms**  
**State Accommodations Tax**  
**Revenue Statement for the 3 Months Ending September 30, 2023**  
**Fiscal Year Ending June 30, 2024**

Date	Description	Total
<b>Revenues</b>		
	Body Armor Assistance Grant	12,352
	September Quarterly Payment from State	-
	December Quarterly Payment from State	-
	March Quarterly Payment from State	-
	June Quarterly Payment from State	-
	YTD Interest Income	53,401
<b>Grand Total</b>		<u><u>65,753</u></u>

**State Accommodations Tax**  
**Detailed Expense Statement for the 3 Months Ending September 30, 2023**  
**Fiscal Year Ending June 30, 2024**

Vendor	Description	A Actual Expenditure	B FY2024 Budget	C Committee Approved	B+C-A (Over)/ Under
<b>Public Restroom Operations</b>					
Dominion	YTD electricity for restrooms	131	700		
IOP WSC	YTD water & irrigation	4,635	12,000		
Bltch, etc	YTD maintenance	675	45,080		
Port City Paper	YTD paper & cleaning supplies	2,851	11,000		
SCMIRF/Wright Flood	YTD property & flood insurance	3,447	10,000		
Quality Touch Cleaning	YTD cleaning	6,166	40,000		
IOP Payroll	YTD attendant	5,811	26,528		
		23,717	145,308		121,591
<b>Beach Barrel &amp; Front Beach Business District Trash Pickup</b>					
JLG Enterprise LLC	YTD trash pickup per contract	27,050			
		27,050	85,000		57,950
<b>Irrigation at Breach Inlet Sign</b>					
IOP WSC	YTD irrigation				
		103	1,000		897
<b>Non- Capital</b>					
Maintain Benches at Parks		394	1,000		
Markers at Parks			2,000		
Beach Wheelchairs and Maintenance			5,000		
		394	8,000		7,606
<b>Beach Trash Barrels</b>					
Beach Trash Cans			7,500		
		-	7,500		7,500

**State Accommodations Tax**  
**Detailed Expense Statement for the 3 Months Ending September 30, 2023**  
**Fiscal Year Ending June 30, 2024**

Vendor	Description	A Actual Expenditure	B FY2024 Budget	C Committee Approved	B+C-A (Over)/ Under
<b>IOP Promotions &amp; Events</b>					
	Connector Run	7,500	7,500		
	Easter Egg Hunt		4,500		
	Music Events		4,500		
		7,500	16,500		9,000
<b>Programs&amp; Sponsorship</b>					
	Provisional Events Approved By Committee	5,000	50,000		
	VFW Post 3137 -Wooden Walkway				\$5,000.00
	July 4th Fireworks	18,274	45,000		
		23,274	95,000		71,726
<b>Charleston CVB - 30% Tourism Promotion Funds</b>					
	Charleston Area CVB	30% distribution for Sept Qtr			
	Charleston Area CVB	30% distribution for Dec Qtr			
	Charleston Area CVB	30% distribution for Mar Qtr			
	Charleston Area CVB	30% distribution for Jun Qtr			
	State Mandated 30% Transfer		976,800		
		-	976,800		976,800
<b>Tourism Promotion Funds</b>					
	Miscellaneous	T-Shirt Sales (20)			
	Charleston Area CVB	Shared Wages Cost (7,110)			
			976,800		
		(7,130)	976,800		983,930
<b>Transfer to IOP Marina for 75% of Bond Debt Service</b>					
	Isle of Palms Marina Enterprise Fund		250,070	-	250,070

**State Accommodations Tax**  
**Detailed Expense Statement for the 3 Months Ending September 30, 2023**  
Fiscal Year Ending June 30, 2024

Vendor	Description	A Actual Expenditure	B FY2024 Budget	C Committee Approved	B+C-A (Over)/ Under
Police	Body Armor 2nd Portable Radar Sign for Traffice	8,732	7,500		
			3,500		
		8,732	11,000		2,268
<b>Capital Outlay</b> <b>Police</b>					
	Truck for Code Enforcement Office	38,209	46,000		
	Radio for Code Enforcement Office		7,600		
		38,209	53,600		15,391
<b>Fire</b>					
	Mobile Radios for New Trucks (If needed)		20,000		20,000
<b>Public Works</b>					
	Caterpillar Trash Loader		200,000		
	Waterway Blvd Multi-Use Path		415,000		
		-	615,000		615,000
<b>Recreation</b>					
	Playground Equipment & Scoreboard		20,000		
	Dog Park Fence		60,000		
	Outdoor Fitness Court		55,000		
		-	135,000		135,000
<b>Front Beach &amp; Restrooms</b>					
	To Repair 4500 Linear Ft of Sidewalk		70,000		70,000

**State Accommodations Tax**  
**Detailed Expense Statement for the 3 Months Ending September 30, 2023**  
Fiscal Year Ending June 30, 2024

		<i>A</i>	<i>B</i>	<i>C</i>	<i>B+C-A</i>
Vendor	Description	Actual Expenditure	FY2024 Budget	Committee Approved	(Over)/ Under
<b>Fire Dept Debt Service on 75' Ladder Truck</b>					
Truist Govt Finance	75' Ladder Truck - Principal		82,439		
	75' Ladder Truck - Interest		9,476		
		-	91,915		91,915
<b>Unexpended Projects/Miscellaneous</b>					
	GF-Public Relations & Tourism Coordinator		21,000		
	GF-Firefighters (2)		157,738		
	GF-Paramedics (3)		206,408		
	GF-Police Officer (1)		85,163		
	GF-ALL Beach Service Officers & Marina Parking Attendant		138,636		
	GF-Police Overtime		20,000		
	MF-Marina Maintenance		50,000		
	MF-Beach Run Sponsorship		3,000		
	MF-T Dock		100,000		
	MF- Marina Green Space		50,000		
	MF-Public Dock		250,000		
			1,000		
			1,082,945		1,082,945
<b>Grand Total</b>		121,849	3,664,638	-	3,535,659

State Accommodations Tax Advisory Committee  
Isle of Palms, South Carolina

Application for City of Isle of Palms ATAX Grant

For Office Use Only

Date Received: _____	Total Project Cost: _____
Total Accommodations Tax Funds Requested: _____	
Recommendation by City of IOP Staff (yes and if so amount ; no; defer to committee; n/a) : _____	
Action Taken By Accommodations Tax Advisory Committee:	
Date _____ Approved _____ Denied _____ Amended _____ Other _____	

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**(Please Use Additional Paper and Include Pertinent Documentation as May Be Needed)**

A. Project Name: Wild Dunes Author Event with Mary Alice Monroe

B. Applicant Organization: Mary Alice Monroe, Ltd.

1. Mailing Address: 7 2<sup>nd</sup> Avenue, Isle of Palms, SC 29451

Telephone: 842-327-4270 Email: maryalice@maryalicemonroe.com

2. Project Director: Mary Alice Monroe

Telephone: 843-327-4270 Email maryalice@maryalicemonroe.com

3. Description of Organization, Its Goals and Objectives:

To establish a nationally prominent literary event on Isle of Palms

To bring 500 plus people to Isle of Palms in January

To promote local businesses and awareness of Isle of Palms.

To support local literacy efforts.

### C. Description and Location of Project:

*The Wild Dunes Author Event with Mary Alice Monroe* is a nationally recognized literary event that brings 500 plus people to Isle of Palms every January to enjoy celebrated authors and artists in a beautiful setting. Last year (2023) we brought in #1 New York Times Authors David Baldacci and Kathy Reichs. Also, author Deborah Goodrich Royce, owner of Ocean House in Rhode Island, our new “sister” event which will grow our event in the northeast.

For 2024 we have New York Times bestselling authors William Kent Krueger, Shelby van Pelt, and Stacy Willingham headlining our program. The event is already half sold out. *Forbes Magazine* stated the Wild Dunes Author Event with Mary Alice Monroe was one of the “best reasons to come to Charleston in the winter.”

Last year we expanded the one-day event to a two-day weekend event (Friday night, Saturday, Sunday). In 2025 we hope to expand the event further to include local artists, poets, nonfiction, and add another day (Monday).

This is an exciting time of growth. In addition, in 2023 we initiated the *Wild Dunes Seasonal Author Events*, a new four events per year schedule. These three smaller events will bring visitors to Isle of Palms in spring, summer, and fall with bestselling authors. The summer event is a children’s event. These seasonal events hold 75-125 guests per event. Combined with the winter of 500 visitors, the literary events will bring in 800 plus guests to Isle of Palms per year.

We want to formally involve and include island restaurants, rentals, and other businesses in our plans for expansion.

The location of the event is exclusively Isle of Palms.

☐ Single Event?

☒ Ongoing Event/Annual Need?

1. Date(s): of project/ event or start date: Jan. 14, 2024 Completion date: Jan. 16, 2024 Additional seasonal events in April, July, September.

2. Impact on Tourism: What percentage of persons benefitting from this project are tourists, ie. those coming from more than 50 miles away and expected to spend the night on Isle of Palms ( 25\_% ) compared to Isle of Palms residents ( 75\_% ) vs. visitors from within 50 miles such as “day trippers” (\_\_\_\_%)

\*Source of tourist data (website tracking, surveys, lodging data, sales information, etc.)

We used lodging and sales data from Wild Dunes. We have switched to a new ticketing firm which will track zip codes in more detail. In 2024 we will conduct surveys.

3. If this application is for an ongoing event, what is the percentage increase/decrease in tourist attendance compared to each of the past three years' events?

2020 we sold out the Sweetgrass Conference Center at 350 tickets.

2021 canceled due to Covid.

2022 we sold 353 tickets but had to cancel due to Covid

2023 we moved to the new Osprey Ballroom of Wild Dunes and added another day to the event. The event sold out 500 tickets for Sunday event, plus additional 128 tickets for Saturday workshops and 45 for boat tour. 146 guests stayed at Wild Dunes hotel.

Attached is a list of zip codes for hotel guests.

We used Wild Dunes ticket sales, lodging data, and sales information.

We did not measure tourist data from local rentals and hotels, etc.

4. Is your event to be conducted entirely on Isle of Palms? YES\_\_\_ If not, please set forth the percentage occurring on Isle of Palms, as well as the specific locations and the percentages occurring elsewhere.
5. To your knowledge, does anyone else promote projects similar to yours within the city limits of Isle of Palms? NO \_\_\_ If so, how is your project similar and/or unique? Given the parameters, please explain why your project is entitled to City of Isle of Palms ATAX funding. NO

6. Set forth fully the successes and failures you have experienced for your proposed project for which you seek City of Isle of Palms ATAX funding for each of the past three years. Set forth the metrics by which you have measured success for the past three years, as well as the metrics by which you will measure success for the current year's project/event on the City of Isle of Palms.

Based on ticket sales, our growth has continued upward.

2020 we sold out 425 tickets.

2021 canceled due to Covid.

2022 we sold 353 tickets but had to cancel due to Covid

2023 we sold out 500 tickets for Sunday event, plus additional 128 tickets for Saturday workshops and 45 for boat tour.

My failure was not collecting data using professional metrics. We did not have the manpower or the financial support to do so. We hope that with ATAX support, we can grow the event and use modern measurements to analyze our growth and success.

7. Describe fully how and why your proposed project/event qualifies for City of Isle of Palms ATAX funding. \_\_\_\_\_

For nineteen years we have held this literary event on Isle of Palms with only the donated support of Wild Dunes Resort and local businesses. The event has grown from 50 people to 500 and is a nationally recognized literary event. We are proud of the success of the event and that it is held on my home island, Isle of Palms. We are

at a tipping point.

With ATAX funding we hope to grow the event to continue to attract the top literary names in the country and to increase and grow the involvement of the Isle of Palms businesses, lodging, restaurants, etc in tourist activities over the weekend, especially during the quiet month of January.

This event receives national attention and puts Isle of Palms on the map for literary and cultural events.

8. If your project is granted City of Isle of Palms ATAX funding and realizes a profit, do you commit to returning the profit to the City of Isle of Palms?

Any profit from the event is donated or passed through to local literacy programs. This year the recipient is Reading Partners of South Carolina.

If not, please explain fully, to include what you will do with the money. **Note:** It is impermissible to donate or “pass through” City of Isle of Palms ATAX grants to any other organization, except as authorized by City of Isle of Palms. Further, the City of Isle of Palms does not approve of “carry forwards” of ATAX grants for use in ensuing years, absent extraordinary and compelling reasons in the sole discretion of the City of Isle of Palms. Excess funds must be returned to the City of Isle of Palms.

9. Please attach your budget reflecting the amounts and sources of all related income and donations from others for the project/event, as well as expenditures for each of the last three years. In addition, set forth projected income and expenses for this year’s project/event, as well as all expenses, both incurred and paid, as well as projected.

I do not have information for beyond 2023. For nearly twenty years we ran the event with donated services and space. Food and expenses were paid for directly from ticket price. If plane fare was required for speakers, again it came from ticket price. I personally paid for all promotion, private dinners with authors, and Angela’s services on the project. All profits (100%) went to literacy charity.

For 2023 income and expenses: See attached.

#### **D. Financial Justification (“heads on beds” and ancillary benefits)**

1. Describe fully and provide relevant documentation for each of the past three years reflecting:
  - Where, as a specific result of your project/event, have tourists spent the night on Isle of Palms, ie. those incurring accommodations taxes for lodging. Include the lodging providers addresses phone numbers, rooms utilized, costs

and nights stayed.

See attached for tourists spending the night on Isle of Palms at Wild Dunes. Many of our guests are day trippers. I do not have information from local hotels and rentals but I am aware many people did rent hotel space elsewhere.

-Where do you project tourists for this year's project to spend the night (ie. lodging for those expected to pay accommodations taxes, to include hotels, condos, house rentals, etc. )? What is the basis for your projection? As an illustration, you may set forth blocks of rooms in hotels that have been reserved, private lodging that has been booked or are expected to be booked, etc

The number of lodging reservations is expected to increase in 2024 due to expanded weekend activities and more out of town advertising. As we grow the event and include the island, more out of town visitors will attend.

Wild Dunes always blocks rooms at a discounted price for the event. I hope to include island rentals in the future.

2. Provide all additional economic and other relevant information justifying the grant of ATAX funding by City of Isle of Palms for your project/event, as well as your means of calculation.

With the expansion and growth of the event, for 2024 I have hired:

- a) Director of Program to oversee event and to coordinate with Isle of Palms businesses. \$3000.
- b) Marketing and Media specialist (Cost to be determined).
- c) New ticket provider (Charleston City Paper) to track information.

3. Set forth the number of tourists attending your project/event on the Isle of Palms for each of the past three years.  
2020 sold out 425 tickets.  
2021 canceled due to Covid.  
2022 sold 353 tickets but had to cancel due to Covid  
2023 we sold out 500 tickets for Sunday event, plus additional 128 tickets for Saturday workshops and 45 for boat tour.

The majority of our attendees are visitors to the Isle of Palms, not residents. Numbers above based on ticket sales.

4. Set forth the number of attendees projected for this year's project/event, and well as the means of calculation.

We expect to sell out tickets at 500. We are currently at 401 tickets sold total.  
Boat ride with Shelby van Pelt to Dewees is sold out  
Happy Hour with WKK is sold out

183 General Admission sold  
94 VIP Admission sold  
45 Mimosas with Stacy Willingham

Calculation is based on tickets sold.

5. Is the project/event for which you seek City of Isle of Palms ATAX funding during the “off season” or “shoulder season”? If not, please explain the justification. Are proposed dates flexible so as to be amenable to off-season and/or shoulder season scheduling?  
YES
6. Describe fully all potentially negative aspects of your project/event, if any. This would include, by way of illustration, the potential for overcrowding particularly during warm weather months, parking challenges, health and safety issues, added responsibilities and difficulties imposed on first responders, impact on peace and tranquility- especially in residential neighborhoods and for tourists and factors potentially impacting adversely on the character of the City of Isle of Palms.

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This event is held in January every year. In nineteen years, we have never had negative aspects of the project for Isle of Palms. Parking is arranged by Wild Dunes.

For the spring, summer, and fall events, the number of guests is significantly smaller, and parking is provided by Wild Dunes Resort.

#### **E. Marketing Plan**

Describe fully your past three years marketing for your project/event, as well as your current year’s advertising and marketing plan, to include all means of broadcast. Please include and attach all applicable documentation and the projected costs involved.

The Wild Dunes Author Event & Weekend is made possible by the generous sponsors who donate time, space, products, or money to make this event a success for literacy. It is made possible by our featured authors who donate their time to attend. This philanthropic effort reflects positively on the authors, the resort, and the Isle of Palms.

Monroe invites authors she personally knows a year in advance. Our marketing plan begins approximately 4 months ahead of the event weekend with outreach to Wild Dunes Club members, then to Mary Alice Monroe's newsletter subscribers and social media followers. From there, our bookstore, sponsors, and authors help amplify the news about ticket sales. We do a mix of traditional media outreach in local newspapers, local television, and online local news outlets. Mary Alice Monroe does interviews for print and goes on television at local news station(s) to promote the event. We have spent less than \$50 total on social media advertising. These efforts have led to a successful, sold-out attendance each year.

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#### **F. Funding:** Sources of Income for This Project/Event (Please attach all supporting

documents)

1. Sponsorships or Fundraising: Amount .Unspecified\_ From: Sponsorships of product from: Firefly Distillery, Charleston Coffee Roasters, Carolines Cakes, Barrier Island Eco-Tours, Long Island Café, J McLaughlin, Wild Dunes Resort
  2. Entry Fees : Amount \$.500. From Jennifer O'Brian, Dewees Island Read Estate
  3. Donations: Amount \$ 1000 From Emily Swanson  
See Attached
  4. Accommodations Tax Funds Request: Amount \$20,000,
- Date(s) Required :Jan. 15, 2024. Lump or Installments both acceptable.
5. Other
  6. Total Funding:                      Total Budget: \$65,000

## G. Financial Analysis

Please Provide a Line Item Budget for your project/event

See Attached.

If awarded, Isle of Palms ATAX funds are requested as follows:

Revised February 8, 2021

(1) Lump Sum(s): \$\_\_\_\_\_ on \_\_\_\_\_ (date),  
\$\_\_\_\_\_ on \_\_\_\_\_ (date),  
\$\_\_\_\_\_ on \_\_\_\_\_ (date).

(2) Payment of Invoices as submitted to City Staff. Invoices should be submitted at least two weeks prior to due date.

## H. Miscellaneous

1. In what category do you place your project/event and why?
  - Festival \_\_\_\_\_
  - Marketing \_\_\_\_\_
  - Other \_ (Please Explain):
  - Literary Event over Martin Luther King 3 day weekend. Plus, additional
  - Literary events in Spring, Summer Fall.
2. Have you affirmatively reached out to the City of Isle of Palms staff for initial review for your project/event and if not, please explain. If you have reached out, what feedback did you receive, both positive and negative and

specifically from whom? Reached out to Desiree Fragoso  
(I was once on the ATAX committee for Isle of Palms.)

3. If applicable, explain why you have not sought funding from sources other than the City of Isle of Palms for the funding of your project/event. If you have sought alternate or additional funding, explain fully the results to include the source(s) for funding, from whom received and set forth all amounts received or expected to be received from other sources.

Up until now, this was a passion project I managed with great personal effort solely with the support of Wild Dunes Resort and donations. I am an author and fortunate to have author friends I could invite to the events. However, the event has grown to such importance and visitor numbers that to move forward I need support. I also recognize the great potential of working closely with the Isle of Palms businesses to explore new opportunities for growth.

4. Does your project/event have applicable liability insurance, to include the City of Isle of Palms, its employees and agents and if so, what are the liability limits? If not, please explain why not and explain who will agree to bear the costs, burdens, damages and legal fees for your project/event in case claims for damages are made against the City of Isle of Palms, its employees and agents as a result of your project/event. A minimum of \$300,000 of liability insurance is typically required unless that requirement is specifically waived in writing by the City of Isle of Palms in its sole discretion. If there is applicable insurance, do you commit to making the City of Isle of Palms, its employees and agents additional insured(s)? If not, explain fully the basis. If applicable, you must include a copy of the relevant insurance policy reflecting the City of Isle of Palms, its employees and agents are additional insured(s) for your project/event.

Wild Dunes has liability insurance for the event.

5. Do you assert that the project/event for which you seek City of Isle of Palms ATAX funding is sustainable in the future? If so, please explain fully. If not, please explain fully. YES \_\_\_\_\_
6. In the event City of Isle of Palms grants your project/event ATAX grant funding, do you acknowledge that no such funds can be spent for the purchase of alcohol or tobacco products? \_\_\_\_\_ YES If not, please explain your justification. \_\_\_\_\_
7. In the event your project/event is awarded City of Isle of Palms ATAX grant funding, but is postponed for more than 180 days of receipt of funding, do you acknowledge that you must return to the City of Isle of Palms all ATAX grant money received from Isle of Palms absent extraordinary circumstances and within the sole discretion of the City of Isle of Palms? Do you agree? YES \_\_\_\_\_ If you do not agree, please set forth fully your reasons. \_\_\_\_\_

8. In the event your project/event is granted City of Isle of Palms ATAX grant funding, you must and do hereby agree by the filing your application personally to hold harmless and indemnify the City of Isle of Palms, its employees and agents from and against any claims for damages to include, *inter alia*, legal fees relative to your project/event. Do you agree? YES. If not, please explain. \_\_\_\_\_  
If not, please explain fully your basis. \_\_\_\_\_
9. In the event the City of Isle of Palms provides ATAX grant funding for your event/project, set forth in detail how you will acknowledge the City of Isle of Palms as a grantor of funding.  
YES INDEED with pride. \_\_\_\_\_

## 2023 BUDGET AND EXPENSES FOR WILD DUNES AUTHOR EVENT

### From Ticket Sales

Julian Buxton Books	\$13,823.19
Jersey Mikes	\$115.90
Cheese Plate Sat Event at Art Gallery	\$546.99
Printing	\$2,371.55
Flowers	\$1,128.97
Firefly tasting	\$250
Facebook Ad	\$17.26
IslandEyenews ad	\$350
Brunch with Deb-Banquets	\$1,652.45
Authors Event -Banquets	\$9,653.98
Authors Dinner	\$797.82
Art Gallery Bookmarks	\$217.72

\$30,925.83

Assistant Expenses \$3000.

Airfare \$1000.

Total: \$34,925.83

2023 WILD DUNES AUTHOR EVENT WITH MARY ALICE MONROE  
DONATED TO EVENT

Room Rental and staff and Wild Dunes Resort      \$18,000.

Hotel Rooms for 3 authors/3 nights all amenities      \$3500.

Coffee from Charleston Coffee Roasters

Cakes from Caroline's Cakes

Signature Coctailf form Firefly Distillery

Boat tour to Dewees Island from Barrier Island EcoTours

Dinner party at Long Island Café

Room Décor with Wild Dunes

DONATION TO LITERACY \$15,000

	Paid Room Nights
Fri 1/13/23	113
Sat 1/14/23	146
Sun 1/15/23	134
	Paid Room Nights
Fri 1/14/22	40
Sat 1/15/22	39
Sun 1/16/22	34
	Paid Room Nights
Fri 1/17/20	18
Sat 1/18/20	28
Sun 1/19/20	22
	Paid Room Nights
Fri 1/11/19	63
Sat 1/12/19	5
Sun 1/13/19	4

Zip Code	Name	Guest#	Package	Res#	Unit	Type	Arrive
28467	Asbjornson, Karol	3GB5WT	3I14K5	3I163U	S237	SORGX	13-Jan
28139	Bails, Eleanor	3GB5DB	3I14K5	3I15VJ	Z203A	ZORG	13-Jan
	Baldacci, David	3GB939	COMPWD	3I21RU	S315	SORG	14-Jan
	Bennett, Kathie	3G87PM	COMPWD	3I21S4	S321	SORGX	14-Jan
29576	Blasi, Margaret	3GB5QP	3I14K5	3I162J	I423	IORGX	14-Jan
28468	Bordeaux, Katie	3GB58G	3I14K5	3I15MK	Z401B	Z2CGK	14-Jan
29576	Devivo, Margaret	3GB5I5	3I14K5	3I1614	I414	IORG	14-Jan
29566	Earnhardt, Amanda	3GB6Z3	FADE15	3I187P	I204	IORG	14-Jan
30114	Faber, Linda	3GB6L8	3I14K5	3I17BE	S522	SORGX	14-Jan
30607	Hernandez, Nancy	3GB7OH	3I14K5	3I18WH	S225	SORG	13-Jan
29487	Kahre, Raymond	3GB8P6	3I14K5	3I20ZU	S415	SORV	14-Jan
21042	O'connell, Brian	3GB61X	3I14K5	3I16FY	S223	SORG	14-Jan
28741	Ratchford, Bill	3GB6W1	3I14K5	3I17XS	S326	SORG	14-Jan
29676	Reams, Bethany	3FP2B4	3I14K5	3I168G	Z505B	Z1CVL	13-Jan
	Royce, Deborah	3GB93F	COMPWD	3I21S0	S239	SORG	14-Jan
29576	Sartori, Melinda	3G54CJ	3I14K5	3I15GD	I419	IORG	14-Jan
27262	Smith, Cathi	3GB58X	FADE15	3I15NP	S337	SORGX	14-Jan
29576	Tutrone, Katherine	3GB5HQ	3I14K5	3I15XD	I405	IORGX	14-Jan
	White, Kristen	3GB93G	COMPWD	3I21S2	S338	SORG	14-Jan
28704	Wodek, Suzanne	3GB8FB	FADE	3I20DG	S433	SORV	15-Jan

Depart	Nights
16-Jan	3
16-Jan	3
16-Jan	2
16-Jan	2
16-Jan	2
15-Jan	1
16-Jan	2
15-Jan	1
16-Jan	2
17-Jan	4
15-Jan	1
16-Jan	2
16-Jan	2
16-Jan	3
16-Jan	2
16-Jan	2
16-Jan	2
16-Jan	2
16-Jan	2
16-Jan	1
	41

State Accommodations Tax Advisory Committee Isle of Palms, South Carolina  
Application for City of Isle of Palms ATAX Grant For Office Use Only

Date Received: \_\_\_\_\_

Total Project Cost: \_\_\_\_\_ Total Accommodations Tax Funds  
Requested: \_\_\_\_\_ Recommendation by City of  
IOP Staff(yes and if so amount ;no; defer to committee; n/a) :

\_\_\_\_\_Acti  
on Taken By Accommodations Tax Advisory Committee:

Date \_\_\_\_\_ Approved \_\_\_\_\_ Denied \_\_\_\_\_ Amended \_\_\_\_\_ Other \_\_\_\_\_

**(Please Use Additional Paper and Include Pertinent Documentation as May  
Be Needed)**

A. Project Name: Rev. Dr. Martin Luther King, Jr., Tribute Week VIP Reception

B. Applicant Organization: YWCA Greater Charleston (YWCAGC)

1. Mailing Address: PO Box 80935 Charleston SC 29416

1. Telephone: 843-722-16440

2. Email: Lbrown@ywca-charlestonsc.org

2. Project Director: Lavanda Brown Executive Director

Telephone: 843-766-1644

Email: LBrown@ywca-charlestonsc.org

3. Description of Organization, Its Goals and Objectives:

YWCA Greater Charleston (YWCAGC) is dedicated to eliminating racism, empowering women, and promoting peace, justice, freedom, and dignity for all. As part of its mission, we are the organizer of the Charleston Region's Rev. Dr. Martin Luther King, Jr. Tribute (MLK).

C. Description and Location of Project:

This application is to sponsor the first event that will launch the 6 day tribute to Dr. King. The inaugural VIP Reception will be held at the Sweetgrass Inn on Wednesday January10, 2024 (the slowest time of the tourist year). It is likely that many of the 150-180 guests will remain overnight on the island as they have not yet checked into other accommodations and will find it convenient to remain in place either for the night or for the entire week of festivities. The resort is generously donating the event space and offering a discount on rooms for guests. IOP is in a unique position to create a new revenue source that could expand our client base significantly. With the opening of the International African American

Museum (IAAM) downtown (a partner of YWCAGC), it is likely that MLK weekend could become a major destination during a time when there is excess accommodation availability. By hosting the premier opening event of the week, the island is positioning itself to be a major destination for participants, and to encourage new visitors to return for vacations at other times of the year.

Yes Single Event?      Ongoing Event/Annual Need?

This could easily become an annual event but we are asking for funding only for year 1.

1. Date(s): of project/ event or start date: 10/10/2024; Completion date: 10/10/2024
2. Impact on Tourism: What percentage of persons benefitting from this project are tourists, ie. those coming from more than 50 miles away and expected to spend the night on Isle of Palms (50%) compared to Isle of Palms residents (10%) vs. visitors from within 50 miles such as “day trippers” (40%)  
Because the reception is for elite visitors, we anticipate many will prefer the convenience of remaining on the island either overnight or for the entire weekend. Guests will include corporate donors, elected officials and other dignitaries. Since this is the first time this event has been held, we cannot be more specific this year but can provide statistics after the event.  
\*Source of tourist data (website tracking, surveys, lodging data, sales information, etc.)
3. If this application is for an ongoing event, what is the percentage increase/decrease in tourist attendance compared to each of the past three years 'events?  
This is the first year for this event. We can provide statistics afterwards.  
\*Source of tourist data \_\_\_\_\_  
(website tracking, surveys, lodging data, sales information, etc.)
4. Is your event to be conducted entirely on Isle of Palms? **YES**
  1. If not, please set forth the percentage occurring on Isle of Palms, as well as the specific locations and the percentages occurring elsewhere.  
Other MLK events will be held throughout the Charleston area but are not part of this application.
5. To your knowledge, does anyone else promote projects similar to yours within the city limits of Isle of Palms? If so, how is your project similar and/or unique? Given the parameters, please explain why your project is

entitled to City of Isle of Palms ATAX funding.

There is no similar event on IOP today and IOP City Council has voted to host the event. It is a unique opportunity to bring a diverse clientele to the island and expand heads in beds during the slowest time of the year.

6. Set forth fully the successes and failures you have experienced for your proposed project for which you seek City of Isle of Palms ATAX funding for each of the past three years. Set forth the metrics by which you have measured success for the past three years, as well as the metrics by which you will measure success for the current year's project/event on the City of Isle of Palms.

With the help of Jan Anderson, we have met with incredible success in planning and scheduling the VIP Reception. When the Wild Dunes Resort was approached, they immediately committed to donating the event space free of charge and to discount rooms for guests. When the Charleston Visitors Bureau (CVB) was approached, they immediately agreed to donate food and beverage costs (bringing IOP ATAX contributions back to the island). A Gullah/Geechie island resident is providing centerpieces, and we are recruiting a band to provide entertainment. IOP City Council has agreed to be hosts. We have never seen everyone coalesce around an idea as quickly as for this event.

7. Describe fully how and why your proposed project/event qualifies for City of Isle of Palms ATAX funding.

The MLK VIP Reception is a unique opportunity to bring a diverse clientele to the island and expand heads in beds during the slowest time of the year. As the initial sponsor of the VIP event, the island is positioned to become a destination for future MLK week visitors, introducing a new demographic to the island and to other island vacation offerings. There is no better way to spend ATAX dollars than to support an event during the slowest time of the year and to a new demographic.

8. If your project is granted City of Isle of Palms ATAX funding and realizes a profit, do you commit to returning the profit to the City of Isle of Palms?  
\_\_\_ If not, please explain fully, to include what you will do with the money.  
**Note:** It is impermissible to donate or "pass through" City of Isle of Palms ATAX grants to any other organization, except as authorized by City of Isle of Palms. Further, the City of Isle of Palms does not approve of "carry forwards" of ATAX grants for use in ensuing years, absent extraordinary

and compelling reasons in the sole discretion of the City of Isle of Palms. Excess funds must be returned to the City of Isle of Palms.

The YWCA does not profit from their events. All fundraisers help YWCAGC offer programming and services and no or low cost to participants (men, women, and youth). If anticipated costs are lower than expected and there are unused funds, with the permission of the ATAX committee, we request that they be used for either a) other MLK event expenses; or b) other YWCA expenses. If this is not permitted, we would return unused funds to IOP.

9. Please attach your budget reflecting the amounts and sources of all related income and donations from others for the project/event, as well as expenditures for each of the last three years. In addition, set forth projected income and expenses for this year's project/event, as well as all expenses, both incurred and paid, as well as projected.

Because this is the first year for the VIP Reception, we do not have a detailed budget to share but will gladly submit a detailed account after the event. Anticipated expenses include: Room rental: \$8500 donated by Wild Dunes Resort; Food and beverage: \$35000 provided by CVB; Centerpieces: \$2500 loaned by the artist: band. TBD; invitations, mailings, administrative cost, marketing/communications: \$10,000.

#### **D. Financial Justification** ("heads on beds" and ancillary benefits)

1. Describe fully and provide relevant documentation for each of the past three years reflecting:
  - Where, as a specific result of your project/event, have tourists spent the night on Isle of Palms, ie. those incurring accommodations taxes for lodging. Include the lodging providers addresses phone numbers, rooms utilized, costs and nights stayed.

Since this is the first year, there is no history of lodging on the island.

-Where do you project tourists for this year's project to spend the night (ie. lodging for those expected to pay accommodations taxes, to include hotels, condos, house rentals, etc. )? What is the basis for your projection? As an illustration, you may set forth blocks of rooms in hotels that have been reserved, private lodging that has been booked or are expected to be booked, etc.

We anticipate that many of the 180 reception guests may stay at the Resort, especially since the resort of offering a discount. Those overnight guests will dine in local restaurants and possibly extend their stay too.

2. Provide all additional economic and other relevant information justifying the grant of ATAX funding by City of Isle of Palms for your project/event, as well as your means of calculation.

Because this is the first year, we can only provide a rough estimate. We anticipate that half of the invited guests would be from out of town and stay at hotels on the island, dining at restaurants and visiting shops. It is also more likely that reception guests would return for family vacations after receiving such a warm reception from our community.

3. Set forth the number of tourists attending your project/event on the Isle of Palms for each of the past three years. Include where applicable all relevant documentation along with the methodology by which you have done your calculations.

The MLK tribute is the longest running and has grown into the largest tribute of its kind in South Carolina. It draws participants from across the state and beyond. The VIP reception is the first event of its kind for the MLK tribute but it is likely this event will evolve into a week-long destination with the support of the CVB and the IAAM museum. IOP will be well positioned to capitalize on this event as a showpiece for the island.

4. Set forth the number of attendees projected for this year's project/event, and well as the means of calculation.

This event is by invitation only and will include as many as 180 invited guests of which we estimate half may opt to stay on the island overnight.

5. Is the project/event for which you seek City of Isle of Palms ATAX funding during the "off season" or "shoulder season"? If not, please explain the justification. Are proposed dates flexible so as to be amenable to off-season and/or shoulder season scheduling?

The event will always occur during the slowest time of the year when there is excess capacity of rooms, restaurants, and beach space.

6. Describe fully all potentially negative aspects of your project/event, if any. This would include, by way of illustration, the potential for overcrowding particularly during warm weather months, parking challenges, health and safety issues, added responsibilities and difficulties imposed on first responders, impact on peace and tranquility- especially in residential neighborhoods and for tourists and factors potentially impacting adversely on the character of the City of Isle of Palms.

Because the reception is during January, there will be NO negative impacts but only positive economic impacts during a time when it is sorely needed.

### E. Marketing Plan

Describe fully your past three years marketing for your project/event, as well as your current year's advertising and marketing plan, to include all means of broadcast. Please include and attach all applicable documentation and the projected costs involved.

YWCAGC utilizes its network of hundreds of members and volunteers along with nearly 4,000 social media followers and e-blast registrants, to promote new initiatives and funding partners. In the last 3 years the MLK tribute's media exposure has grown from 3-5 media appearances to 7 in 2023 including local networks, print, and radio. In the last three years our engagement through Facebook increased by 27%, Twitter by 16%, Instagram by 231%, and our website traffic increased by 14%.

F. **Funding:** Sources of Income for This Project/Event (Please attach all supporting documents)

1. Sponsorships or Fundraising: Amount **\$43,500 From Wild Dunes Resort and CVB**

2. Entry Fees : Amount \$ \_\_\_\_ 0 \_\_\_\_ From \_\_\_\_\_

3. Donations: Amount \$ \_\_\_\_ 0 \_\_\_\_ From \_\_\_\_\_

4. Accommodations Tax Funds Request: Amount **\$10,000**  
Date(s) Required: **1/1/2024** Lump Sum **YES** Installments \_\_\_\_\_

5. Other:

6. Total Funding: **\$43500** Total Budget: **\$53500**

### G. Financial Analysis

Please Provide a Line Item Budget for your project/event

If awarded, Isle of Palms ATAX funds are requested as follows:

Marketing/Communications - \$3,000

Photography/AV - \$2,500

Administrative oversight (logistics, reminders, event coordination) - \$2,000

Branded collateral - \$1,500

Invitations/mailling - \$1,000

- (1) Lump Sum(s): \$10,000 on 1/1/2024(date), \$\_\_\_\_\_ on \_\_\_\_\_(date), \$\_\_\_\_\_ on \_\_\_\_\_(date).
- (2) Payment of Invoices as submitted to City Staff. Invoices should be submitted at least two weeks prior to due date.

#### H. Miscellaneous

1. In what category do you place your project/event and why?
  - Festival\_\_\_\_\_
  - Marketing\_\_\_\_\_.
  - Other \_(Please Explain): Celebration for a very worthy cause
2. Have you affirmatively reached out to the City of Isle of Palms staff for initial review for your project/event and if not, please explain. If you have reached out, what feedback did you receive, both positive and negative and specifically from whom?  
IOP City Council has voted to host the VIP Reception, indicating their support of the event.
3. If applicable, explain why you have not sought funding from sources other than the City of Isle of Palms for the funding of your project/event. If you have sought alternate or additional funding, explain fully the results to include the source(s) for funding, from whom received and set forth all amounts received or expected to be received from other sources.  
We have received donations from Wild Dunes Resort (event space), CVB (food and beverage), a local artist (centerpieces), and a local band (TBD).
4. Does your project/event have applicable liability insurance, to include the City of Isle of Palms, its employees and agents and if so, what are the liability limits? If not, please explain why not and explain who will agree to bear the costs, burdens, damages and legal fees for your project/event in case claims for damages are made against the City of Isle of Palms, its employees and agents as a result of your project/event. A minimum of \$300,000 of liability insurance is typically required unless that requirement is specifically waived in writing by the City of Isle of Palms in its sole discretion. If there is applicable insurance, do you commit to making the City of Isle of Palms, its employees and agents additional insured(s)? If not, explain fully the basis. If applicable, you must include a copy of the relevant insurance policy reflecting the City of Isle of Palms, its employees and agents are additional insured(s) for your project/event.

**YES** \_\_\_\_\_

5. Do you assert that the project/event for which you seek City of Isle of Palms ATAX funding is sustainable in the future? If so, please explain fully. If not, please explain fully.  
*With the willing support received this year as an example, we anticipate that the event should be sustainable in the future, but we would always welcome ATAX support too.*
6. In the event City of Isle of Palms grants your project/event ATAX grant funding, do you acknowledge that no such funds can be spent for the purchase of alcohol or tobacco products? **YES** If not, please explain your justification. \_\_\_\_\_
7. In the event your project/event is awarded City of Isle of Palms ATAX grant funding, but is postponed for more than 180 days of receipt of funding, do you acknowledge that you must return to the City of Isle of Palms all ATAX grant money received from Isle of Palms absent extraordinary circumstances and within the sole discretion of the City of Isle of Palms? Do you agree? **YES** If you do not agree, please set forth fully your reasons.  
\_\_\_\_\_
8. In the event your project/event is granted City of Isle of Palms ATAX grant funding, you must and do hereby agree by the filing your application personally to hold harmless and indemnify the City of Isle of Palms, its employees and agents from and against any claims for damages to include, *inter alia*, legal fees relative to your project/event. Do you agree? **YES** If not, please explain. \_\_\_\_\_  
If not, please explain fully your basis. \_\_\_\_\_
9. In the event the City of Isle of Palms provides ATAX grant funding for your event/project, set forth in detail how you will acknowledge the City of Isle of Palms as a grantor of funding.  
*YWCA GC consistently promotes its events, and sponsors on social media, newsletters, all media outlets and at our events. YWCAGC also announces events and sponsors via press releases to gain local news outlets support and stories. If awarded and if approved YWCAGC director of communications will work with IOP staff to develop and robust announcement of the funding and partnership.*

Revised February 8, 2021

Isle of Palms ATAX Committee  
IOP Songwriters Festival: April 14<sup>th</sup>, 2024  
Application for City of Isle of Palms ATAX Grant

- A. Project Name: Isle of Palms Songwriters Festival
- B. Applicant Organization: Landeo Music Productions & Follywood Productions
1. Mailing Address: 1504 Devol St., Mount Pleasant, SC 29466  
Telephone: 864-414-8315 | Email: [ddlandeo@msn.com](mailto:ddlandeo@msn.com)
  2. Project Director: Dave Landeo & Ben Bounds  
Telephone: 864-414-8315 | Email: [ddlandeo@msn.com](mailto:ddlandeo@msn.com)  
Telephone: 864-554-6277 | Email: [follywoodrocks@gmail.com](mailto:follywoodrocks@gmail.com)
  3. Description of Organization, Its Goals & Objectives: Organization is collaboration of two agencies coming together to promote a unique festival experience for Isle of Palms. Goal is to establish the Lowcountry's first regional songwriters festival, eventually becoming a nationally recognized event and attracting national recording and touring singer-songwriters.
- C. Description & Location of Project: Ocean Blvd. from Windjammer to Pavilion Dr. (or same footprint that spring and holiday festivals incorporate).  
Ongoing Event / Annual Need
1. Sunday, April 14, 2024
  2. Impact on Tourism: Tourists: 50% | IOP Residents: 25% | Visitors Within 50 Miles: 25%
  3. Event was held at The Dinghy in 2023 (1<sup>st</sup> Year). We expect the percentage increase of tourist attendance to increase substantially if/when we increase the budget through the ATAX grant and move the festival to Ocean Blvd.
  4. Yes
  5. No, we do not believe there is a competing event on IOP. This will be a unique event.
  6. The only setback in 2023 was rain/weather related.
  7. The IOP Songwriters Festival will be a unique event for this region that will bring visitors from outside of the Lowcountry who will stay for a night or two to enjoy the beach during the offseason, while also discovering some new, talented songwriters they haven't heard or seen before. Being an all-ages, family friendly event, this festival will draw families looking for a relaxing, safe and fun getaway that will have something for the whole family.
  8. Originally, we had hoped to hold back a share of any profits to use as seed money for the following year, as well as make a small donation to a local nonprofit. If there are examples of extraordinary or compelling reasons to be allowed to carry fund forward from one year to the next, please advise.
  9. Please see P&L Included in separate attachement.
- D.
1. 2024 will be only the second year for the IOP Songwriters Festival. In 2023, this event taking place at in one singular business' parking lot, so it wasn't necessarily the scale of event that would entice potential

tourists from outside the 1-hour radius of Charleston County to travel. Making the transition to a bona fide, City-sanctioned street closure festival will give the IOP Songwriters Festival the legitimacy it needs to create a brand and generate interest and buzz throughout the State of SC and surrounding states. We expect to see an uptick in both hotel and condo rentals, as well as short term rentals such as AirBnB and VRBO.

2. Based on past experience directing community festivals in the Charleston County area, we are aware that we will incur costs for Insurance, Security, Entertainment, Sound Production, Staging, Children's Activities, Portable Toilets, Advertising, etc. We intend to use any funding we receive from IOP ATAX to go towards any of those costs permitted by the ATAX Committee. We believe we can put the entire event together for less than \$10,000.

3. A few hundred visitors attended the inaugural IOP Songwriters Festival in 2023. With the legitimacy of becoming a street festival with vendors, kids activities, more talented artists, etc., we expect this event to grow by hundreds of visitors annually beginning in 2024.

4. One goal we have for 2024 is 1,000+ attendees. This will only be possible by moving the festival from the Dinghy parking lot to Ocean Blvd and adding vendors, kids activities and other attractions. One way we can track attendance if we move to Ocean Blvd. will be to wristband all who are over 21. This is a great way to get a fairly accurate estimate on attendance.

5. We are seeking an offseason date, sometime between February and April.

6. We do not foresee any negative aspects of this event. What we're proposing is a daytime, all-ages, family and community friendly event that will draw young adults, young families, empty nesters and retirees – an event that is multigenerational that truly does offer a little something inexpensive, clean and wholesome for the whole family to enjoy together.

E. The 2024 advertising and marketing plan will include a mix of high quality printed posters / flyers, social media advertising (Facebook, Instagram), traditional media appearances on local TV and radio stations and print media interviews and previews. Our exact budget will depend on a combination of sponsorship and grant money. We intend to be very aggressive and intentional with our marketing efforts, including a heavy emphasis on both social and traditional media. Projected Advertising & Marketing Budget: \$2,500.

## F. Funding

1. Sponsorships: \$5K from local businesses

Fundraising: 5K Race | Silent Auction | 50/50 Raffle | Wristbands (\$5 for 21+)

2. Entry Fees: \$5 for 21+ (Kids get in free)

3. Donations: Pending

4. ATAX Grant Request: \$5K

Date(s) Required: 3/1/2024 Lump Sum

5.

6. Total Funding

H. Miscellaneous

1. Festival

2. No, we have not. We can do that immediately.

3. We intend to seek funding from a handful of alternate sources. This event will have a higher cost than what we are asking for from IOP ATAX, so we will have sponsorship goals for title sponsor, stage sponsor and event sponsors, all at different price levels.

4. Our intention was to partner with a nonprofit and potentially have them help us with the insurance. We have experience securing event insurance for many events similar in size and scale as this one.

5. The IOP Songwriters Festival is absolutely sustainable. It is our intention to make this a long lasting annual event that the City and its residents can be proud of and look forward to every year.

6. Yes, we acknowledge that no IOP ATAX funds will be used for the purchase of alcohol or tobacco.

7. Yes, we agree.

8. Yes, we agree.

9. In order to acknowledge the City of Isle of Palms as grantor of funding, the IOP Songwriter Festival will list the City as an in-kind sponsor on any and all advertising and promotion, including the official website. We would also like to have someone from the City be an emcee or presenter at the event, possibly either the Mayor or Director of Tourism.



## **PRESS RELEASE 2023**

Event: **Isle of Palms Songwriter Festival**

When: Sunday March 12, 2023 3pm to 10pm

Where: The Dinghy – 8 JC Long Blvd., Isle of Palms, SC 29451  
(across from The Windjammer)

Purpose: To benefit a local philanthropy (**Lowcountry Orphan Relief**) and share great local songwriters/performers with the community.

Details:

- Local/Regional songwriters (6 acts) will perform upbeat original material in a beach venue setting
- Outdoor covered stage on the venue property/ Patrons will have access to food & beverages
- Donated items auctioned throughout the day (to include 3 guitars).
- Free to the public
- Sponsors include: East Coast Entertainment, Rusty's Cool Guitars, MPS Construction and Spoken Word Children's Therapy
- Promotion will include all social media outlets (Facebook, Instagram, etc) with appearance on WCIV television's "Lowcountry Live!" on Tuesday March 7<sup>th</sup> 10:30am (week of the event)
- T-Shirt sales available.
- Websites: **[www.IsleofPalmsSongwritersFestival.com](http://www.IsleofPalmsSongwritersFestival.com)**  
**[www.Facebook.com/IOPSongwritersFestival](https://www.Facebook.com/IOPSongwritersFestival)**

Organizer: Landeo Music Productions, LLC  
Charleston musician/songwriter/performer  
(865) 414-8315 / [ddlandeo@msn.com](mailto:ddlandeo@msn.com)

IOP Songwriters Festival: March 12, 2023  
Profit & Loss

**Income:**

Sponsors:	\$3500.
Donations	\$2630.
(Raffles, Auction)	
Total Income:	<b>\$6130.</b>

**Expenses:**

Website	\$20.36
Stage Rental	\$1000.
T-Shirts	\$540.
Art Promo	\$62.98
Banner	\$313.92
Posters	\$32.97
Misc.	\$32.13
Musicians	\$1250.
(6 acts)	

Total Expense: **\$3251.36**

Total Donations to Lowcountry Orphan Relief: \$2878.64



## Media Flyer 2003



# Isle of Palms Songwriters Festival

Sunday March 12th

To benefit the Lowcountry Orphan Relief  
@ The Dinghy 3pm to 10pm

 Jamison	 Lauren Hall	 Abbey Elmore
 Chris Dodson	 Dave Landeo	 Travis Allison

**Free Admission - Live Auction - Good Times**



# Festival aids Lowcountry Orphan Relief

BY KATHERINE BERRY  
FOR THE ISLAND EYE NEWS

If you love live music, free admission and upbeat jams to shake your tailfeather, then you're in for a treat. The Dinghy will host the very first Isle of Palms Songwriter Festival March 12, from 3 p.m. to 10 p.m., featuring some of the top musicians around town, including Jamisun, Lauren Hall, Abbey Elmore, Chris Dodson, Travis Allison and Dave Landeo.

The festival was born from the mind of philanthropic full-time musician Dave Landeo, who has played internationally and throughout the Lowcountry for more than 20 years. He and Elmore were scheduled to play at the Dinghy, so an idea sparked to invite a few other talented friends to share the stage. Voila – The first annual Songwriter Festival.

The lineup of artists will perform 30-to-45-minute sets where they will play their upbeat, original tunes with the beach breezes setting the mood. If the weather is grouchy, there

will be a plan B – but don't let a less than perfect Lowcountry day scare you.

On-site, there will be access to food, drink and a silent auction. All auction proceeds will benefit Lowcountry Orphan Relief, which focuses on providing services to children who have been abused or neglected.

Thanks to a series of serendipitous events and good timing, Landeo has partnered with local sponsors East Coast Entertainment, Rusty's Cool Guitars, MPS Construction and Spoken Word Children's Therapy to help make the event happen. His goal is to bring awareness to the good work Lowcountry Orphan Relief is doing as well as promote good times and good tunes with some of our favorite local artists with a beach setting. Yes, please, and thank you.

To learn more or to donate auction items, visit [IsleofPalmsSongwritersFestival.com](http://IsleofPalmsSongwritersFestival.com).



## Pulse

### Lineup of singer-songwriters lands on IOP

Charleston musician **Dave Landeo** brings back his **Isle of Palms Songwriters Festival** from 3-10 p.m. March 12 at **The Dinghy** bar and grill showcasing diverse singer-songwriters. Catch performances from **Jamisun, Lauren Hall, Abbey Elmore, Travis Allison, Chris Dodson** and **Landeo**. The event is free and donated items will be auctioned throughout the day to raise funds for **Lowcountry Orphan Relief**. For more information, visit [isleofpalmsongwritersfestival.com](http://isleofpalmsongwritersfestival.com).

Isle of Palms ATAX Committee  
IOP Songwriters Festival: April 14<sup>th</sup>, 2024  
Profit & Loss  
\*Sample

Income:

ATAX Grant	\$5,000
Wristbands	\$2,500 (500 Paid)
Vendor Booth Spaces	\$2,250 (30 Paid)
Silent Auction	\$1,000
Title Sponsor	\$1,000
Stage Sponsor	\$1,000
T-Shirt & Poster Sponsors	\$1,000

Total Income: \$13,750

Expenses:

Music & Production	\$5,000
Advertising	\$2,000
Jump Castles	\$500
Portable Toilets	\$500
T-Shirts	\$500
Director's Fee	\$1,000 (\$500 Each)

Total Expenses (Pending): \$9,500

Donations:

Total Donations:

2024 (Estimated) Profit: \$4,250

\*This is just a scenario.

State Accommodations Tax Advisory Committee  
Isle of Palms, South Carolina

Application for City of Isle of Palms ATAX Grant

For Office Use Only

Date Received: _____	Total Project Cost: _____
Total Accommodations Tax Funds Requested: _____	
Recommendation by City of IOP Staff (yes and if so amount ;no; defer to committee; n/a) : _____	
Action Taken By Accommodations Tax Advisory Committee:	
Date _____	Approved _____ Denied _____ Amended _____ Other _____

(Please Use Additional Paper and Include Pertinent Documentation as May Be Needed)

A. Project Name: Window Replacement/Building Maintenance

B. Applicant Organization: VFW Post 3137

1. Mailing Address: 1004 Ocean Blvd: IOP, SC 29451

Telephone: 843 Email: george.page@pagesrelax.com

2. Project Director: SAME

Telephone: 843 8859464 Email SAME

3. Description of Organization, Its Goals and Objectives:

see attached

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

C. Description and Location of Project:

Rear windows, a total of 4  
Need replacing as each window box  
has rotted & windows leak

☒ Single Event?

☐ Ongoing Event/Annual Need?

1. Date(s): of project/ event or start date: ASAP Completion date: 4/20/24
2. Impact on Tourism: What percentage of persons benefitting from this project are tourists, ie. those coming from more than 50 miles away and expected to spend the night on Isle of Palms (20%) compared to Isle of Palms residents (30%) vs. visitors from within 50 miles such as "day trippers" (50%)  
log in data, word of mouth, member guest, out of town vets who are annual visitors  
\*Source of tourist data (website tracking, surveys, lodging data, sales information, etc.)
3. If this application is for an ongoing event, what is the percentage increase/decrease in tourist attendance compared to each of the past three years' events? goes up every year  
\*Source of tourist data logs  
(website tracking, surveys, lodging data, sales information, etc.)
4. Is your event to be conducted entirely on Isle of Palms? yes If not, please set forth the percentage occurring on Isle of Palms, as well as the specific locations and the percentages occurring elsewhere.
5. To your knowledge, does anyone else promote projects similar to yours within the city limits of Isle of Palms? If so, how is your project similar and/or unique? Given the parameters, please explain why your project is entitled to City of Isle of Palms ATAX funding.  
unknown
6. Set forth fully the successes and failures you have experienced for your proposed project for which you seek City of Isle of Palms ATAX funding for each of the past three years. Set forth the metrics by which you have

measured success for the past three years, as well as the metrics by which you will measure success for the current year's project/event on the City of Isle of Palms. see Attachment 1

7. Describe fully how and why your proposed project/event qualifies for City of Isle of Palms ATAX funding. charitable org - vet tourist seek out our post!
8. If your project is granted City of Isle of Palms ATAX funding and realizes a profit, do you commit to returning the profit to the City of Isle of Palms? N/A  
If not, please explain fully, to include what you will do with the money. **Note:** It is impermissible to donate or "pass through" City of Isle of Palms ATAX grants to any other organization, except as authorized by City of Isle of Palms. Further, the City of Isle of Palms does not approve of "carry forwards" of ATAX grants for use in ensuing years, absent extraordinary and compelling reasons in the sole discretion of the City of Isle of Palms. Excess funds must be returned to the City of Isle of Palms.
9. Please attach your budget reflecting the amounts and sources of all related income and donations from others for the project/event, as well as expenditures for each of the last three years. In addition, set forth projected income and expenses for this year's project/event, as well as all expenses, both incurred and paid, as well as projected.

**D. Financial Justification** ("heads on beds" and ancillary benefits)

1. Describe fully and provide relevant documentation for each of the past three years reflecting:
  - Where, as a specific result of your project/event, have tourists spent the night on Isle of Palms, ie. those incurring accommodations taxes for lodging. Include the lodging providers addresses phone numbers, rooms utilized, costs and nights stayed.
  - Where do you project tourists for this year's project to spend the night (ie. lodging for those expected to pay accommodations taxes, to include hotels, condos, house rentals, etc. )? What is the basis for your projection? As an illustration, you may set forth blocks of rooms in hotels that have been reserved, private lodging that has been booked or are expected to be booked, etc.

we keep visitor logs that I.D. all non residents. these logs indicate that there are potentially hundreds of nights purchased annually
2. Provide all additional economic and other relevant information justifying the grant of ATAX funding by City of Isle of Palms for your project/event, as well as your means of calculation. visitor logs, personal viewing, talking to visitors
3. Set forth the number of tourists attending your project/event on the Isle of Palms for each of the past three years. Include where applicable all relevant documentation along with the methodology by which you have done your calculations. Too many to count: Generally 200-300 per month
4. Set forth the number of attendees projected for this year's project/event, and well as the means of calculation. unknown - project is for building maintenance

5. Is the project/event for which you seek City of Isle of Palms ATAX funding during the "off season" or "shoulder season"? If not, please explain the justification. Are proposed dates flexible so as to be amenable to off-season and/or shoulder season scheduling? OFF SEASON
6. Describe fully all potentially negative aspects of your project/event, if any. This would include, by way of illustration, the potential for overcrowding particularly during warm weather months, parking challenges, health and safety issues, added responsibilities and difficulties imposed on first responders, impact on peace and tranquility- especially in residential neighborhoods and for tourists and factors potentially impacting adversely on the character of the City of Isle of Palms. NONE

#### E. Marketing Plan

Describe fully your past three years marketing for your project/event, as well as your current year's advertising and marketing plan, to include all means of broadcast. Please include and attach all applicable documentation and the projected costs involved.

VFW Golf Tourney: Front Beach Festivals, world of month

F. **Funding:** Sources of Income for This Project/Event (Please attach all supporting documents)

Facebook Newsletter

1. Sponsorships or Fundraising: Amount \$ N/A From most funding comes from dues to members
2. Entry Fees : Amount \$ \_\_\_\_\_ From \_\_\_\_\_
3. Donations: Amount \$ \_\_\_\_\_ From \_\_\_\_\_
4. Accommodations Tax Funds Request: Amount \$ 2,500

Date(s) Required: ASAP Lump Sum ☒ Installments \_\_\_\_\_

5. Other:

6. Total Funding: \$2,500 Total Budget: estimated \$5,200

#### G. Financial Analysis

Please Provide a Line Item Budget for your project/event

4 windows total \$2,200  
labor total \$3,000

If awarded, Isle of Palms ATAX funds are requested as follows:

(1) Lump Sum(s): \$ 2500 on Jan 7 2024 (date),  
\$ \_\_\_\_\_ on \_\_\_\_\_ (date),  
\$ \_\_\_\_\_ on \_\_\_\_\_ (date).

(2) Payment of Invoices as submitted to City Staff. Invoices should be submitted at least two weeks prior to due date.

#### H. Miscellaneous

1. In what category do you place your project/event and why?
  - Festival \_\_\_\_\_
  - Marketing \_\_\_\_\_
  - Other (Please Explain): ✓ Maintenance
2. Have you affirmatively reached out to the City of Isle of Palms staff for initial review for your project/event and if not, please explain. If you have reached out, what feedback did you receive, both positive and negative and specifically from whom?  
mentioned to couple city council & spoke favorably
3. If applicable, explain why you have not sought funding from sources other than the City of Isle of Palms for the funding of your project/event. If you have sought alternate or additional funding, explain fully the results to include the source(s) for funding, from whom received and set forth all amounts received or expected to be received from other sources.  
we have clues to get funding that exist with maintenance
4. Does your project/event have applicable liability insurance, to include the City of Isle of Palms, its employees and agents and if so, what are the liability limits? If not, please explain why not and explain who will agree to bear the costs, burdens, damages and legal fees for your project/event in case claims for damages are made against the City of Isle of Palms, its employees and agents as a result of your project/event. A minimum of \$300,000 of liability insurance is typically required unless that requirement is specifically waived in writing by the City of Isle of Palms in its sole discretion. If there is applicable insurance, do you commit to making the City of Isle of Palms, its employees and agents additional insured(s)? If not, explain fully the basis. If applicable, you must include a copy of the relevant insurance policy reflecting the City of Isle of Palms, its employees and agents are additional insured(s) for your project/event. yes
5. Do you assert that the project/event for which you seek City of Isle of Palms ATAX funding is sustainable in the future? If so, please explain fully. If not, please explain fully. yes - better view for tourists
6. In the event City of Isle of Palms grants your project/event ATAX grant funding, do you acknowledge that no such funds can be spent for the purchase of alcohol or tobacco products? yes If not, please explain your justification. \_\_\_\_\_
7. In the event your project/event is awarded City of Isle of Palms ATAX grant

funding, but is postponed for more than 180 days of receipt of funding, do you acknowledge that you must return to the City of Isle of Palms all ATAX grant money received from Isle of Palms absent extraordinary circumstances and within the sole discretion of the City of Isle of Palms? Do you agree? Yes If you do not agree, please set forth fully your reasons. \_\_\_\_\_

8. In the event your project/event is granted City of Isle of Palms ATAX grant funding, you must and do hereby agree by the filing your application personally to hold harmless and indemnify the City of Isle of Palms, its employees and agents from and against any claims for damages to include, *inter alia*, legal fees relative to your project/event. Do you agree? Yes If not, please explain. \_\_\_\_\_  
If not, please explain fully your basis. \_\_\_\_\_
9. In the event the City of Isle of Palms provides ATAX grant funding for your event/project, set forth in detail how you will acknowledge the City of Isle of Palms as a grantor of funding. Personal letter & thanks

In past have had grand opening/presentation open to ATAX & City Council

**The objects of this organization shall be fraternal, patriotic, historical, charitable and educational; to assist the Posts and members thereof of the Veterans of Foreign Wars (VFW) of the United States, and its own members whenever possible; to maintain true allegiance to the Government of the United States of America and fidelity to its Constitution and Laws; to foster true patriotism; to maintain and extend the institutions of American freedom and equal rights and justice to all men and women; and to preserve and defend the United States of America from all her enemies.**