



**Accommodations Tax Advisory Committee**

11:00 a.m., Tuesday, March 12, 2024

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. **Election of Chair and Vice Chair**
3. **Approval of previous meeting's minutes** – November 8, 2023 [Pgs. 2-5]
4. **Financial Statements** – Finance Director Debra Hamilton [Pgs. 6-11]
5. **Old Business** – None
6. **New Business**  
Presentations of application for FY25 State Accommodations Tax funds  
Mary Alice Monroe – Author Event [Pgs. 12-28]
7. **Miscellaneous**  
Next meeting date: 11:00 a.m., April 16, 2024.
8. **Adjournment**



## ACCOMMODATIONS TAX ADVISORY COMMITTEE

11:00am, Wednesday, November 8, 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, Gloria Clarke

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

2. **Approval of previous meeting's minutes – October 5, 2023**

Ms. Bergwerf made a motion to approve the minutes of the October 5, 2023 meeting, and Mr. Burns seconded the motion.

Mr. Akers asked the word “not” be added to a sentence at the top of the third page regarding the consideration of Chamber of Commerce’s funding application.

A vote was taken with all in favor of the minutes as amended.

3. **Financial Statements**

Treasurer Hamilton reported that the fund balance as of 9/30/23 is \$4 million, which is a \$1.3 million increase over last year. A \$12,000 grant for body armor and \$53,000 in interest income have been received into FY24. She reviewed the expenditures to date.

She also reported that she has received all the required information from the CVB she needs to complete the TERC report this week.

Treasurer Hamilton confirmed that the balance of sponsorship funds is \$35,000.

4. **Old Business -- none**

5. **New Business**

A. **Approval of FY23 over budget expenditures**

**MOTION:** Ms. Bergwerf made a motion to approve the \$338 overage for the irrigation at Breach Inlet message board and the \$3,439 overage for the Public Works F-150 replacement truck. Ms. Lorenz seconded the motion. The motion passed unanimously.

**B. Presentations of new applications for second round funding for accommodations tax funds in FY24**

**i. Author's Event by Mary Alice Monroe**

Mary Alice Monroe came before the Committee to request \$20,000 to help fund further advertising and messaging to expand the author's event and literacy fundraiser she will host in Wild Dunes in January 2024. She shared a video showcasing the 2023 event.

Ms. Monroe explained how the event is promoted online and through social media as well as the offerings for the 2024 event. She and her staff will provide City staff with further information about their room night breakdown provided with their application.

Mr. Truslow would like to see Ms. Monroe have her 501(C)(3) application in place before awarding any funding. Administrator Fragoso said the funding could be approved contingent upon confirmation of their 501(C)(3) status. She also noted that having a 501(C)(3) is not a requirement of the State ATAX law but only a guideline set up by the ATAX Committee.

**ii. Dave Landeo and Ben Bounds – Songwriters' Festival**

Dave Landeo and Ben Bounds explained their vision to create a songwriters' festival on the Isle of Palms. Mr. Landeo held a small version of the event at The Dinghy earlier this year and would like to expand it beyond their parking lot. Mr. Bounds shared his extensive experience in organizing and promoting events on Folly Beach and more recently in Columbia. They would like to begin promoting a February 2024 event.

Committee members expressed concern about funding an event that has no historical data to show its impact on the Isle of Palms. Administrator Fragoso stated there would not be enough time before February to prepare City resources for a sizable February event. After a lengthy discussion, Mr. Landeo and Mr. Bounds will reapply for funding for FY25.

**iii. LaVanda Brown – YWCA of Greater Charleston MLK Event**

LaVanda Brown of the YWCA of Greater Charleston came before the Committee requesting \$10,000 for a sponsor/donor event to be held in Wild Dunes as part of a larger celebration honoring Martin Luther King, Jr. in January 2024. Administrator Fragoso stated that Ms. Brown had brought this event before City Council a few months ago. She said City Council embraced the idea of the event and suggested Ms. Brown come before ATAX to request funding.

Committee members expressed concern about this event also not having historical data to show that the attendees stay on the Isle of Palms and that they come from outside of the 50-mile tourism radius. Ms. Brown shared some names of those companies whose representatives would be invited and added that speakers are coming from all over the state. The current estimate for the event is 180 people.

Committee members expressed concern about putting ATAX funds towards an invitation-only event.

Administrator Fragoso explained to the Committee that the “heads in beds” is not in the State ATAX law and only a guideline created by the ATAX Committee to consider when discussing an application for funding.

iv. **IOP VFW Post Request – Window replacement**

George Page of the IOP VFW thanked the Committee for the support of previous projects. He explained the request of \$2500 that will go towards the \$5200 cost of replacing the windows that overlook the beach. He provided many details on the volume of visitors the VFW hosts each year.

Ms. Bergwerf said she believes the cost of maintaining the building should be a concern of the post. Mr. Page explained that their golf tournament fundraiser does not generate as much income as it has in the past.

Mr. Burns later added that using ATAX funds to help repair the walkway and elevator at the VFW Post made sense, but he believes the window replacement should be at their expense.

**MOTION: Mr. Truslow made a motion to recommend to City Council an award of \$20,000 to Mary Alice Monroe’s writer’s workshop contingent upon her organization securing its 501(C)(3) status. Ms. Bergwerf seconded the motion. The motion passed unanimously.**

**MOTION: Ms. Clarke made a motion to recommend to City Council an award of \$10,000 to the YWCA Sponsor/Donor Dinner at Wild Dunes. Mr. Akers seconded the motion.**

**MOTION: Ms. Bergwerf made a motion to amend the award amount to \$5,000. Mr. Akers seconded the motion.**

Committee members continued to discuss their concerns about the lack of historical success data for this event as well as its exclusivity. Ms. Clarke noted that the event will bring people to the island in January and may result in less than 30 rooms being rented. Ms. Lorenz said she would like to offer a lower amount towards a new event that brings people to the island.

**MOTION: Ms. Lorenz made a motion to amend the award amount to \$2,500. Ms. Bergwerf seconded the motion. The motion to amend was passed unanimously.**

**VOTE: The vote on the motion as amended was as follows:**

Ayes: Lorenz, Akers, Bergwerf, Clarke

Nays: Kovalich, Truslow, Burns

**The motion passed 4-3.**

**6. Miscellaneous Business**

The next meeting of the ATAX Committee will be Tuesday, March 12, 2024 at 11am to review the applications for FY25 funding.

Ms. Kovalich asked for the State ATAX law and the ATAX Committee guidelines to be sent to her for review.

**7. Adjournment**

Mr. Truslow made a motion to adjourn, and Ms. Bergwerf seconded the motion. The meeting was adjourned at 1:09pm.

Respectfully submitted,

Nicole DeNeane  
City Clerk

**City of Isle of Palms  
State Accommodations Tax  
Balance Sheet  
as of February 29, 2024**

	<b>2/28/2023</b>	<b>2/29/2024</b>
CASH @ TRUIST	\$ 602,647	\$ 294,238
CASH @ SC LOCAL GOVERNMENT INVESTMENT POOL	3,490,331	5,514,016
ACCOUNTS RECEIVABLE	-	-
AMOUNTS DUE FROM OTHER FUNDS	-	-
	<hr/>	<hr/>
TOTAL ASSETS	<u>4,092,977</u>	<u>5,808,254</u>
ACCOUNTS PAYABLE	1,952	760
AMOUNTS DUE TO OTHER FUNDS	-	359,404
	<hr/>	<hr/>
TOTAL LIABILITIES	<u>1,952</u>	<u>360,164</u>
FUND BALANCE Beginning	2,913,157	4,154,059
Excess Revenues Over/(Under) Expenditures	1,177,869	1,294,031
FUND BALANCE	<u>4,091,026</u>	<u>5,448,090</u>
TOTAL LIABILITIES & FUND BALANCE	<u>\$ 4,092,977</u>	<u>\$ 5,808,254</u>

**City of Isle of Palms**  
**State Accommodations Tax**  
**Revenue Statement for the 8 Months Ending February 29, 2024**  
Fiscal Year Ending June 30, 2024

Date		Description	Total
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**Revenues**

		Body Armor Assistance Grant	12,352
		September Quarterly Payment from State	1,334,491
		December Quarterly Payment from State	516,998
		March Quarterly Payment from State	-
		June Quarterly Payment from State	-
		YTD Interest Income	177,301

**Grand Total**

	2,041,141
	2,041,141

**State Accommodations Tax**  
**Detailed Expense Statement for the 8 Months Ending February 29, 2024**  
 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	432	700		
IOP WSC	YTD water & irrigation	7,994	12,000		
Blich, etc	YTD maintenance	1,670	45,000		
Port City Paper	YTD paper & cleaning supplies	4,256	11,000		
SCMIRF/Wright Flood	YTD property & flood insurance	10,911	10,000		
Irrigation By Design	YTD Backflow Testing	80	80		
Quality Touch Cleaning	YTD cleaning	18,395	40,000		
IOP Payroll	YTD attendant	13,182	26,528		
		56,921	145,308		88,387
<b>Beach Barrel &amp; Front Beach Business District Trash Pickup</b>					
JLG Enterprise LLC	YTD trash pickup per contract	45,985			
		45,985	85,000		39,015
<b>Irrigation at Breach Inlet Sign</b>					
IOP WSC	YTD irrigation				
		241	1,000		759
<b>Non- Capital</b>					
Maintain Benches at Parks			1,000		
Markers at Parks			2,000		
Beach Wheelchairs and Maintainence		394	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 8 Months Ending February 29, 2024**  
 Fiscal Year Ending June 30, 2024

		<i>A</i> Actual Expenditure	<i>B</i> FY2024 Budget	<i>C</i> Committee Approved	<i>B+C-A</i> (Over)/ Under
<b>IOP Promotions &amp; Events</b>					
Connector Run		7,500	7,500		
Easter Egg Hunt		781	4,500		
Music Events			4,500		
		8,281	16,500		8,219
<b>Programs &amp; Sponsorship</b>					
Provisional Events Approved By Committee		25,000	50,000		
VFW Post 3137 -Wooden Walkway	\$5,000.00				
Island School Literacy Events	\$20,000.00				
July 4th Fireworks		18,274	45,000		
		43,274	95,000		51,726
<b>Charleston CVB - 30% Tourism Promotion Funds</b>					
Charleston Area CVB	30% distribution for Sept Qtr	421,418			
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		
		421,418	976,800		555,382
<b>Tourism Promotion Funds</b>					
Miscellaneous	T-Shirt Sales/Google Storage	(7)			
Charleston Area CVB	Shared Cost	(15,271)			
		(15,278)	-		15,278

**State Accommodations Tax**  
**Detailed Expense Statement for the 8 Months Ending February 29, 2024**  
 Fiscal Year Ending June 30, 2024

Vendor	Description	A Actual Expenditure	B FY2024 Budget	C Committee Approved	B+C-A (Over)/ Under
<b>Transfer to IOP Marina for 75% of Bond Debt Service</b>					
Isle of Palms Marina Enterprise Fund			250,070	-	250,070
Police					
	Body Armor (Funded by Grant)	9,502	7,500		
	2nd Portable Radar Sign for Traffice		3,500		
		9,502	11,000		1,498
<b>Capital Outlay</b>					
<b>Police</b>					
	Truck for Code Enforcement Office	40,659	46,000		
	Radio for Code Enforcement Office		7,600		
		40,659	53,600		12,941
<b>Fire</b>					
	Mobile Radios for New Trucks		20,000		20,000
	(If needed)				
<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	16,420	20,000		
	Dog Park Fence	49,023	60,000		
	Outdoor Fitness Court	55,000	55,000		
		120,443	135,000		14,557

**State Accommodations Tax**  
**Detailed Expense Statement for the 8 Months Ending February 29, 2024**  
Fiscal Year Ending June 30, 2024

Vendor	Description	A Actual Expenditure	B FY2024 Budget	C Committee Approved	B+C-A (Over)/ Under
<b>Front Beach &amp; Restrooms</b>					
	To Repair 4500 Linear Ft of Sidewalk	-	70,000		70,000
<b>Fire Dept Debt Service on 75' Ladder Truck</b>					
	Truist Govt Finance		82,439		
	75' Ladder Truck - Principal		9,476		
	75' Ladder Truck - Interest		-		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>		731,839	3,664,638	-	2,917,521

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	
A i	k	&	C i	A d	i d

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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 (part of the Wild Dunes Literary Series)

B. Applicant Organization: I.S.L.E. (ISLAND SCHOOL LITERACY EVENTS) created by Mary Alice Monroe Ltd.

1. Mailing Address: 7 2ND AVENUE ISLE OF PALMS, SC 29451

Telephone: 843-327-4270 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:

Our goals are to establish a nationally prominent literary event on Isle of Palms that attracts 500 attendees to the island in January for the main event. Plus, we aim to

attract 300 people to the Isle of Palms in the spring, summer, and fall for seasonal literary events. The purpose of this seasonal literary series is to connect readers with notable writers here on the island that helps raise awareness of the island town, promotes the local businesses, and supports 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 people to the Isle of Palms every January to enjoy conversations and experiences with celebrated authors in a beautiful setting. In 2023, we brought in #1 New York Times bestselling authors David Baldacci and Kathy Reichs. Also, author Deborah Goodrich Royce, owner of Ocean House in Rhode Island.

In January 2024, we welcomed New York Times bestselling authors William Kent Krueger, Shelby Van Pelt, and Stacy Willingham as our headlining authors. The event sold out of its 500 main event tickets weeks before the weekend began! Our Saturday workshops were at or near capacity. Because of the high demand and interest of the weekend, we added a Friday night kick-off party, held at The Islander 71 restaurant, and made possible thanks to ATAX funding. This event had an RSVP list of over 200, with more than 120 guests in attendance! This was an incredible turnout considering that the party was on the same day as the area was under a winter storm alert. The entire weekend was a beautiful success! And ended with a memorable Authors' Dinner at Long Island Café. And we attribute this growing success in part to the impactful support of ATAX funding.

Single Event?

Ongoing Event/Annual Need?

1. Date(s): of project/ event or start date: Jan. 17, 2025  
Completion date: Jan. 19, 2025

**NOTE:** *The Wild Dunes Author Event & Weekend in January is the flagship literary event that is part of the now established Wild Dunes Literary Series which features a total of four seasonal events. The spring, summer, and autumn events are one-day only and attract a much smaller crowd of 100-125 guests. All events celebrate literature and continue to solidify the Isle of Palms as a literary destination for locals and out-of-towners.*

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 (32.9 %) compared to Isle of Palms residents (n/a %) vs. visitors from within 50 miles such as "day trippers" (67.1%)

NOTE: The percentages were calculated from our Feedback Survey that was given to guests in-person at the Main Event and emailed to all attendees.

We received responses back from 149 guests. Those who identified themselves as an IOP resident were lumped into the larger percentage since they did not book a stay on the island. Our survey was printed and distributed to every guest and collected at the end of the event. And we emailed the survey link out immediately after the event, through Mailchimp.

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

*Mailchimp Survey Results (including written survey details collected, ATTACHMENT INSERTED AT BOTTOM OF THIS FORM)*

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?

Using the lodging data available to us from Wild Dunes Resort, we were able to determine the number of guests staying on Isle of Palms was an increase from 2023 to 2024. Prior to 2023, we did not track on-island reservation data. However, we have monitored the annual event's success through ticket sales, which have trended upward year-after-year.

\*Source of tourist data: Mailchimp survey; written survey; Wild Dunes Resort reservations feedback; Ticketing Sales numbers

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.  

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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. **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 main event, plus additional 128 tickets for Saturday workshops and 45 for boat tour.

2024 we sold out again for Sunday main event, plus sold an additional 120 free tickets for Friday literary kick-off party highlighting local authors at The Islander 71 Restaurant, and 211 tickets total for Saturday workshops (3 smaller events).

My failure in past years was not collecting data using professional metrics. We did not have the manpower or the financial support to do so. For 2024, we were better able to do that with the generous support of ATAX funding. With your continued support we will be able to continue to grow the event in ways that attract/monitor our growing audience in ways that will allow us to make this an even more impactful weekend experience that supports the island's local businesses through the positive power of this well-established literary event.

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 the ongoing support of ATAX funding, I can continue to grow this literary weekend into one that garners top literary names in the country and works to create opportunities that benefit an increasing number of 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. And this upward trend of attendance and support of the winter literary weekend (thanks in part to an ATAX grant) has allowed me to firmly establish Isle of Palms as a literary destination for readers through the *Wild Dunes Literary Series with Mary Alice Monroe*. In spring, summer, and fall, I organize and host smaller author events that bring 100-125 guests to the island to enjoy a spring author luncheon, a summer family-focused reading event for children's books, and a fall author talk. But, the flagship event is the annual Wild Dunes Author Event & Weekend every winter in January.

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.

Any profit from the event would be donated or passed through to a local literacy program. The 2024 recipient was Reading Partners South Carolina.

We intend for the charity recipient for 2025 to again be Reading Partners South Carolina.

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 prior to 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 profit (100%) went to literacy charity.

**For 2024 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.

According to our Mailchimp survey, the January 2024 event resulted in 32.9% of surveyed guests who stayed overnight on Isle of Palms and were not island residents. The survey respondents who said they said overnight at a hotel not on the Isle of Palms were noted in the 67.1% of respondents who were either island residents, locals from the Tri-County, or visitors who chose to stay off island.

I will have the Wild Dunes Resort reservations data available to share with the ATAX committee in March during the presentation.

-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.

I anticipate the 2025 January event to easily sell out beyond 500 attendees for the main event, and a sell out crowd at all other lower-priced events on island. We anticipate this because it will mark the 20<sup>th</sup> anniversary of the island's literary tradition. We plan to work hard on outreach to long-lead press for early coverage in southern or coastal destination-focused magazines, and will strive to obtain a well-known media sponsor that can help us spread the message about this literary experience.

In years past, we only publicly promoted Wild Dunes Resort hotels because of our long-standing partnership. But, with ATAX funding support, we can have the manpower to coordinate with the other island hotels and cabins messaging that promotes lodging opportunities among our potential guests. With that, we will also make an effort to involve/promote the island's retail and food establishments among our potential guests, to help raise awareness and business island-wide. ATAX funding will allow us to be able to track where our Wild Dunes Author Event & Weekend guests are staying on island and where they visited.

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.

For 2024, I was able to hire a program director, and marketing and media specialist, and we were able to switch to a ticketing platform that

tracked our attendees. These are expenses that allowed me to amplify the promotion of this literary event and formally establish a Literary Series that is exclusive to the Isle of Palms. Funding allows me the ability to continue to promote the winter event/literary series as a destination experience, year-round, which keeps the Isle of Palms in the spotlight in positive and marketable ways among the reading and writing communities through the state and far beyond.

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.

**2024:** We sold out our 500 tickets for Sunday main event, plus sold an additional 120 free tickets for Friday literary kick-off party highlighting local authors at The Islander 71 Restaurant, and 211 tickets total for Saturday workshops (3 smaller events).

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

**2022:** we sold 353 tickets but had to cancel due to spike in Covid outbreak locally.

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

**2025:** We will sell out 500 tickets to our Sunday Main Event, along with an additional 500 tickets to smaller workshops/experiences that are part of the Wild Dunes Author Event & Weekend experience. Those additional tickets will include: a Friday kick-off event (200 tickets); 3-5 Saturday events featuring local/regional authors at various locations throughout the island.

We will track our attendees' accommodations using a promo code coordinated by our marketing and media director who will work with island businesses who want to be part of the literary event weekend.

We will use our ticketing system to see which zip codes our guests are from. And, we will continue to offer a survey to our attendees to help us collect information about their weekend visit to the Isle of Palms, so we can always be working to improve the experience for all.

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 This annual flagship event is held during off season, and is the largest of the year. We have been able to formally expand this literary event into the Wild Dunes Literary Series, which offers once a season a one-day only and held exclusively on the Isle of Palms (on Wild Dunes Resort property) during a weekday that does not interfere with weddings and corporate events, nor does it conflict with other major island events. The purpose remains the same as the winter flagship event, which is connecting readers (near and far) with notable writer through a memorable event in the picturesque setting of my island town, the Isle of Palms.

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.

This event is held 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.

I (Mary Alice) invite authors approximately 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 my 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. I give my time doing interviews for print and television at local news station(s) to promote the event. In years past, I have spent my own money on social media advertising. These efforts have led to a successful, sold-out attendance each year.

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

1. Sponsorships or Fundraising: Amount \$ UNSPECIFIED  
From:  
Our sponsorships have historically been product donations. These are the sponsors who we will invite to join us again for 2025: Firefly Distillery; Charleston Coffee Roasters; Caroline's Cakes; Barrier Island Eco Tours; Long Island Café; J. McLaughlin; Wild Dunes Resort; Islander 71; (and more!)
2. Entry Fees : Amount \$ **NONE** (Ticketed Events Only)
3. Donations: Amount \$ **NONE COLLECTED YET**
4. Accommodations Tax Funds Request: Amount **\$ 35,000**

**Expanding.... Spring summer and fall...**

Date(s) Required: **January 16, 2025**  
Lump Sum  or Installments  Either is acceptable

5. Other:
6. Total Funding:  Total Budget: **\$70,000**

**G. Financial Analysis**

Please Provide a Line Item Budget for your project/event

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

(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):

This is a literary weekend event held annually during the Martin Luther King federal holiday weekend, which encourages our guests to stay an extra night because of the holiday. It is the flagship event that is part of the Wild Dunes Literary Series, which offers smaller, seasonal one-day events featuring an author and their work. This is made possible thanks to the support of the Isle of Palms ATAX funding. Connecting readers to notable writers in intimate ways on the Isle of Palms.

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?

I have been in touch with 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 Resort 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, I will acknowledge my city with pride!**

And I hope you will join us for the January 2025 event to experience the positive energy and memorable conversations that our guests (and featured authors) enjoy so much!

**ATTACHMENTS:**

[1] EXPENSE SUMMARIES (SPREADSHEET)

[2] MAILCHIMP SURVEY (JANUARY 2024: RESPONDENTS WHO ATTENDED THE WILD DUNES AUTHOR EVENT & WEEKEND)

TICKETING COLLECTIONS	ticket price	tax \$	service fee \$	total \$
Main Event - general admission	65.00			19,844.45
Main Event - VIP	125.00			19,178.54
Morning Mimosas	42.00			4,095.87
Nature as a Muse (no book)	50.00			1,718.02
Happy Hour & Mysteries	40.00			4,523.84
<b>TOTAL TICKET SALES (including fees)</b>				<b>49,360.72</b>
<b>EXPENSES FROM TICKETING (Buxton Books)</b>	<b>Ticket price</b>	<b>Tax fee \$</b>	<b>Service fee \$</b>	<b>Total \$</b>
Bold Type Tickets - service/processing fee				4,093.72
Bold Type Tickets - facilitator fee				1,244.00
Buxton Books (Books + Tax)				26,745.83
Buxton Books (4 sponsorship bags w/ 3 books in each)				384.00
<b>TOTAL REVENUE DUE TO I.S.L.E.</b>				<b>16,893.17</b>
<b>EVENT WEEKEND EXPENSES (Wild Dunes)</b>	<b>----</b>	<b>----</b>	<b>----</b>	<b>Total \$</b>
Printing: program and signage (Wild Dunes)				1,244.39
Authors' Gift Baskets (Wild Dunes)				370.50
Morning Mimosas (Wild Dunes service)				1,917.08
Happy Hour & Mysteries (Wild Dunes service)				2,455.78

Main Event (Wild Dunes service)				9,725.06
Main Event flowers + decor (Wild Dunes)				1,097.32
Day of Event Staff Lunch/Drinks (Wild Dunes)				187.02
Authors' Dinner at Coastal Provisions (Wild Dunes)				393.28
Event Florals				1,097.32
<b>Balance Due to Wild Dunes</b>				<b>17,390.43</b>
			<b>REMAINDER:</b>	<b>497.26</b>
<b>ADDITIONAL EVENT-RELATED EXPENSES</b>	<b>Ticket price</b>	<b>Tax fee</b>	<b>Service fee \$</b>	<b>Total</b>
Nature as a Muse (ferry fee only)	(charged \$50.00)		25.00 for ferry	<b>750.00</b>
Kickoff Party				1,990.66
Firefly Tasting Fee				<b>250.00</b>
Desserts for Kickoff Party				54.50
Promo Bookmarks				112.50
Authors' Signing Tables floral decor				68.59
Social Media Ads				0.00
Staging Support (inventivENVIRONMENTS)				1,000.00
<b>Total Additional Unpaid Expenses for I.S.L.E.</b>				<b>2,000.00</b>
			<b>GRAND TOTAL REMAINDER:</b>	<b>2,497.26</b>
<b>ADDITIONAL EXPENSES (I.S.L.E.)</b>				
Creation of non-profit organization status				<b>1,121.00</b>
Marketing and Media Director, Laura Anderson				<b>5,696.00</b>
Program Director, Angela May				<b>7,177.50</b>
Wild Dunes Expense				<b>3,614.28</b>
<b>ADDITIONAL FUNDS COLLECTED</b>				<b>Total</b>
Built In Charity Money for Reading Partners				
Sponsor (Workshop Level): Jennifer O'Brien				500.00

Sponsor (Corporate Level): Emily & Steve Swanson				1,500.00
ATAX Funding				20,000.00
<b>Total Collected by I.S.L.E.</b>				<b>22,000.00</b>

### **MAILCHIMP SURVEY RESULTS**

#### **TOTAL NUMBER OF INDIVIDUALS WHO STAYED ON ISLE OF PALMS FOR THE EVENT:**

- Total surveyed: **149**
- Stayed on Isle of Palms: **49** (32.9%)
- Did not stay on Isle of Palms: **100** (67.1%).

#### **WHERE EVERYONE STAYED (WHO ANSWERED YES TO STAYING ON ISLE OF PALMS):**

- A Wild Dunes Resort Hotel: **24** (45.3%)
- A rental unit inside Wild Dunes: **4** (7.5%)
- A rental unit on the island: **1** (1.9%)
- A hotel on the island: **4** (7.5%)
- With a friend who lives on the island: **4** (7.5%)
- OJ the island: **1** (1.9%)
- Other (various personal residences and locations): **15** (28.3%).

#### **MOST COMMON STATES ATTENDEES WERE FROM**

- South Carolina - 63
- North Carolina - 14
- Georgia - 6
- Mississippi - 3
- Alabama - 3
- Illinois - 2
- Ohio - 2

#### **TALLIED LIST OF WHERE EVERYONE IS FROM (CITY AND STATE):**

- Mt. Pleasant, SC - 9
- Isle of Palms, SC - 7
- Charleston, SC - 7
- Summerville, SC - 4
- Johns Island, SC - 4
- Wild Dunes, SC - 3
- Murrells Inlet, SC - 3
- Eupora, MS - 3

- Myrtle Beach, SC - 3
- Charlotte, NC – 3
- Akron, OH - 3
- Awendaw, SC - 2
- Seabrook Island, SC - 2
- Huntsville, AL - 2
- Daniel Island, SC – 2
- Gainesville, GA - 1
- Laurens, SC - 1
- Waxhaw, NC - 1
- Louisville, KY - 1
- Evanston, IL - 1
- Athens, GA - 1
- Folly Beach, SC - 1
- Ravenell, SC - 1
- South Port, NC - 1
- James Island, SC - 1
- Surfside Beach, SC - 1
- Sumter, GA - 1
- Tybee Island, GA - 1
- Apex, NC - 1
- Atlantic Beach, NC - 1
- Winston Salem, NC - 1
- North Charleston, SC - 1
- Richmond, VA - 1
- Jacksonville, FL - 1
- Gastonia, NC - 1
- Wake Forest, NC - 1
- Lafayette, LA - 1
- Rutherfordton, NC - 1
- Auburn, AL - 1
- Atlanta, GA - 1
- Carmel, IN - 1
- Pittsburgh, PA - 1
- Beaufort, SC - 1
- Lexington, SC - 1
- Blair, SC - 1
- Burnsville, MN - 1
- Pawleys Island, SC - 1
- Aiken, SC - 1
- Chicago, IL - 1
- Folly Beach, SC - 1
- North Myrtle Beach, SC - 1

- West Ashley, SC - 1
- Seabrook Island, SC - 1
- Londonderry, NH - 1
- NYC, NY - 1
- Minnesota - 1
- Ravenel, SC - 1
- Southern Pines, NC - 1
- Gray Court, SC - 1
- Mt Pleasant, NC - 1
- This is a test, SC - 1
- Spartanburg, SC - 1
- Baden, Ontario, Canada - 1
- Sullivans Island, SC - 1
- Westerville, OH - 1
- Sunset Beach, NC - 1
- Mullins, SC - 1
- Johnson City, TN - 1
- Albany, GA - 1

**TOP 10 THINGS PEOPLE LOVED MOST ABOUT THE EVENT:**

- Listening to authors talk candidly about writing process.
- Signature Firefly cocktail.
- Discussion of how to write a book – masterclass.
- Hearing from all authors.
- Cocktail party at Islander 71.
- Q&A sessions.
- Author talks.
- Authors being themselves.
- Small gatherings on Saturday.
- Well-organized event.

**TOP 10 WAYS WE COULD IMPROVE THE EVENT:**

- Better clarity and organization in ticket details and registration.
- Improvement in food line management.
- Longer Q&A time and more tickets for special excursions like Dewees Island.
- Clear and separate lines for VIP during main event entry.
- Better food setup and organization.
- Avoiding duplication of free books for VIP.
- Better organization and flow of food stations.
- More silent auction items and brunch format for the main event.
- Longer author discussions.
- Better seating arrangements and more space in the main event.

**SUGGESTED AUTHORS FOR FUTURE EVENTS (mentioned more than once)**

- Kristin Hannah - 20
- Louise Penny - 9

- John Grisham - 6
- Geraldine Brooks - 6