



Accommodations Tax Advisory Committee

11:00 a.m., Thursday, April 7, 2022

Council Chambers

1207 Palm Boulevard

Isle of Palms, South Carolina

Public Comment:

Citizens may provide public comment here:

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

Agenda

1. **Call to Order** and acknowledgment that the press and the public had 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** - January 19, 2022
4. **Financial Statements** – Debbie Suggs, City Treasurer
5. **Old Business**
6. **New Business**
 - a. Discussion and consideration of request for ATAX funding from MUSC Hollings Cancer Center for Lowvelo Bike Ride at IOP on November 5, 2022
 - b. Discussion and consideration of request for ATAX funding from the IOP Chamber of Commerce for website development
 - c. Discussion and consideration of FY23 proposed State ATAX budget
 - d. Discussion of ATAX Committee's roles and responsibilities
7. **Miscellaneous**

Date of next meeting: 11:00 a.m., _____, 2022.
8. **Executive Session**
9. **Adjournment**



ACCOMMODATIONS TAX ADVISORY COMMITTEE
11:00am, Wednesday, January 19, 2022
1207 Palm Boulevard, Isle of Palms, SC and
broadcasted live on YouTube: <https://www.youtube.com/user/cityofisleofpalms>

MINUTES

1. Call to order

Present: Doug Truslow, Ray Burns, Glenda Nemes, David Nelson

Absent: Rusty Williamson, Sally Muhlig, Malcolm Burgiss

Staff Present: Administrator Fragoso, Treasurer Suggs, City Attorney Brent Halversen

2. Approval of the previous meetings' minutes – November 16, 2021

MOTION: Mr. Truslow made a motion to approve the minutes. Ms. Nemes seconded the motion.

Ms. Nemes said she felt there were points missed in the minutes. She did not give examples. City Clerk DeNeane suggested she bring those points to the next meeting and read them into the record.

VOTE: The minutes passed unanimously.

MOTION: Mr. Nelson made a motion to add Citizens' Comments to the agenda. Mr. Truslow seconded the motion. The motion passed unanimously.

3. Citizens' Comments

Ms. Helen Hill of the CVB said that the uptick in COVID-related cases has affected group business to the area but not individuals traveling or vacationing. She said progress has been made on the IOP-specific website and thanked Administrator Fragoso for her help in getting information out to the businesses about it. There has not been a big response as of yet. She also reported that she has been meeting with people who wish to start a Chamber of Commerce for the Isle of Palms.

4. Financial Statements – Treasurer Suggs

Treasurer Suggs said there is \$2.9M in the ATAX account as of 12/31/2021, which is \$1M up from 2020. A payment has been made to the CVB with an ending fund balance of \$2.4M. She briefly reviewed the expenditures to date.

Treasurer Suggs pointed out the \$1.3M ATAX distribution received was for “heads in beds” during June, July, and August. This was the biggest ATAX payment the City has ever received in September, which is an indication of “booming” economic activity.

Mr. Truslow expressed concern about the \$398,000 payment to the CVB with no contract, no metrics, no oversight, and possible non-compliance with the procurement code. Administrator Fragoso said that the questions about the procurement code could be answered in Executive Session. She added, “Every year through the budgeting process, the City approves the CVB as the City’s direct marketing organization. You can see there is a placeholder, as you mentioned, in the budget, and it assigns the Charleston Visitor’s Bureau as the recipient of that allocation until an alternative is developed by the City. Then the City will have a different alternative, a different option, of how that State disbursement needs to be issued. The City reports to TERC every year who this allocations goes to, who the direct marketing organization goes to, so the CVB has been properly selected by the City as the DMO.”

Mr. Truslow said he has been unable to locate in City records where the City decided the CVB would be the sole source option of the City’s direct marketing organization. He referred to two AG opinions that the City did not act properly. Administrator Fragoso said that could be further discussed in Executive Session. Mr. Truslow would like to have that spoken about outside of Executive Session.

Mr. Halversen said that because there are legal considerations to be taken into account, he did not think it would be appropriate to discuss this outside of Executive Session.

Ms. Nemes expressed concern that City Council has not yet dealt with the three recommendations sent to them by the ATAX Committee. She would like clarification on the purview of the ATAX Committee. She said her reading about Executive Session and FOIA does not support using Executive Session for legal advice. She noted some residents’ concerns about the overuse of Executive Session.

Mr. Halversen said he would discuss the law and what the law says in open session, but as it “is pertaining to the issues you brought up at the previous meetings, those would be applications of the law, my interpretation of them to you and Council, and that I do not feel comfortable talking to you about in an open forum. I can explain my rationale for that concern, if you would like, to have Executive Session. Otherwise whatever I can talk to you about in open forum will be limited to State law and what the procedure says.”

Mr. Burns said the Committee has done what City Council has asked of them and that they need more direction. He agreed that what the Committee needs to discuss should be done in public.

Administrator Fragoso said, “Just to be very clear. Every time the City Council goes into Executive Session it is to either discuss a personnel matter, to receive legal advice or legal update on any pending litigation or receive legal advice on any issue. The questions that have been presented by this committee I’m not able to answer because I am not the City’s attorney. This committee has repeatedly asked to hear from the City’s attorney, so that is why he is here. The questions that have been asked by this committee will be stated before we go into Executive

Session, and the legal advice in any discussion, in Executive Session, will be limited to those questions, which you properly articulated are related to whether or not the City has been following proper procurement code, whether the City can withhold that money in a separate account while City Council makes a decision about an alternative, moving forward what can the City do with the expenditure of 30% funds. Because we have had the conversation here can the City use it for anything other than tourism promotion and advertisement. That requires legal advice and an interpretation of the law, and those topics have to be addressed by the City attorney. I will not make a decision for City Council to waive attorney-client privilege. That is something that Council will decide to do. In the meantime, any time we receive legal advice, it has to be done in Executive Session unless City Council votes to waive that privilege.”

Mr. Burns said, “I would add to the list the question of the appropriateness of having a contract with the nonprofit DMO with measurable metrics.”

Mr. Truslow said he is concerned about the City’s overuse of Executive Session.

MOTION: Ms. Nemes made a motion to add to the agenda “a general discussion of procedure and what the State law requires concerning the ATAX funds, procurement, RFPs, and process.” Mr. Truslow seconded the motion.

Administrator Fragoso noted that there is still one item on the agenda to be addressed, and that she and Treasurer Suggs have a budget meeting scheduled for noon. Ms. Nemes said she had read Robert’s Rules of Order and that staff does not need to be present for Executive Session. Administrator Fragoso said she would remain present for any Executive Session.

A vote was taken as follows:

Ayes: GN, DT

Nays: RB, DN

The motion failed.

5. **Old Business - none**

6. **New Business**

A. **Discussion and consideration of request for ATAX funding from the Law Enforcement Neighborhood Support Program**

Kitty Riley, President of the IOP Exchange Club, came before the ATAX Committee requesting \$5000 to support the efforts of the Law Enforcement Neighborhood Support Program, which is led by Ted Kinghorn. These funds would be used to help tourists who may be experiencing hardship during their stay on the island, i.e. a car accident or health emergency requiring them to extend their stay. Those in need would be identified by the Public Safety staff. She spoke about the group’s mission and some planned events for educating the public about safety issues and City ordinances pertinent to their stay on the island.

She said they have raised \$25,000 to date and would like to have \$50,000 in the fund. Chief Cornett identified the need for \$10-15,000 in previous years for hardship assistance. They will do

further fundraising through other events. The group hopes to expand their efforts to the Fire Department in the future.

Ms. Nemes said they will need to provide an accounting of where and how that money was used and stressed that it needed to be used on tourists, people who live more than 50 miles from the Isle of Palms. Ms. Riley said this money would have a separate accounting and be used for hardships experienced by tourists only.

MOTION: Mr. Truslow made a motion to recommend to City Council the allocation of \$2500 to the Law Enforcement Neighborhood Support Program. A vote was taken as follows:

Ayes: GN, DT, RB

Nays: DN

Mr. Nelson said he did not feel this request falls with the ATAX use guidelines. Ms. Riley said she would have further documentation to share at the February Ways & Means Committee meeting.

7. **Miscellaneous Business**

The next meeting of the ATAX Committee will be Wednesday, February 9, 2022 at 10am.

MOTION: Ms. Nemes made a motion to go into Executive Session to receive legal information.

There being no second, the motion failed.

Mr. Truslow asked about what topics could be discussed in public. He again spoke about the proper procurement of the CVB as the City's DMO. Administrator Fragoso said, "The City's budget, which is approved by Council through an ordinance, which requires two readings, includes the allocation of the existing DMO, and it is listed as the Charleston Area Visitors Bureau. We believe confidently that is an appropriate selection of the existing DMO, and that is approved by Council, again, by ordinance.

Mr. Burns said he believed that budget line item to be a placeholder and that the money does not have to go to the CVB. Administrator Fragoso said that until the City creates or selects an alternative, that is where the money goes. She added, "To my knowledge there is no other regional tourism organization in the area that has an ongoing tourist promotion program, which is what the State law requires." The recommendations of the ATAX Committee have been relayed to City Council for further action.

Mr. Truslow said he did not understand how the City could move forward with the CVB when the ATAX Committee did not approve their budget, which they did not see until after the City's FY22 budget was approved. He referred to the Domains case saying that the ATAX Committee is to be the "first level of review" when it comes to the DMO budget. He asked for insight from Mr. Halversen.

Administrator Fragoso pointed out that the Committee failed to pass the motion to allow for a general discussion of ATAX and its allocations as well as Executive Session, and it is inappropriate to continue to this discussion.

Ms. Nemes expressed concern about being “denied” access to legal advice without going into Executive Session. Mr. Truslow said he asked for this discussion to be added to the agenda. Mr. Burns suggested allowing time for City Council to weigh in on the three recommendations sent to them by the Committee. Their action will determine what further information the Committee will need.

8. Adjournment

Mr. Truslow made a motion to adjourn, and Mr. Nelson seconded the motion. The meeting was adjourned at 12:16pm.

Respectfully submitted,

Nicole DeNeane
City Clerk

**City of Isle of Palms
State Accommodations Tax
Balance Sheet
as of March 31, 2022**

	3/31/2021	3/31/2022
CASH @ BB&T	\$ (174,429)	\$ (22,776)
CASH @ SC LOCAL GOVERNMENT INVESTMENT POOL	1,983,664	2,614,717
ACCOUNTS RECEIVABLE	-	-
AMOUNTS DUE FROM OTHER FUNDS	<u>-</u>	<u>-</u>
TOTAL ASSETS	<u>1,809,236</u>	<u>2,591,941</u>
ACCOUNTS PAYABLE	5,289	(2,035)
AMOUNTS DUE TO OTHER FUNDS	<u>-</u>	<u>-</u>
TOTAL LIABILITIES	<u>5,289</u>	<u>(2,035)</u>
FUND BALANCE Beginning	1,680,864	1,798,371
Excess Revenues Over/(Under) Expenditures	123,082	795,605
FUND BALANCE	<u>1,803,946</u>	<u>2,593,976</u>
TOTAL LIABILITIES & FUND BALANCE	<u>\$ 1,809,236</u>	<u>\$ 2,591,941</u>

City of Isle of Palms
State Accommodations Tax
Revenue Statement for the 9 Months Ending March 31, 2022
Fiscal Year Ending June 30, 2022

Date	Description	Total
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Revenues

September Quarterly Payment from State	1,258,679
December Quarterly Payment from State	507,590
March Quarterly Payment from State	-
June Quarterly Payment from State	-
YTD Interest Income	1,446

Grand Total	1,767,715
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State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2022
 Fiscal Year Ending June 30, 2022

Vendor	Description	A Actual Expenditure	B FY2022 Budget	C Committee Approved	B+C-A (Over)/ Under
Public Restroom Operations					
Dominion	YTD electricity for restrooms	506	500		
IOP WSC	YTD water & irrigation	7,384	12,000		
Blich, etc	YTD maintenance	2,504	45,080		
Port City Paper	YTD paper & cleaning supplies	6,270	7,500		
SCMIRF/Wright Flood	YTD property & flood insurance	7,585	7,000		
Quality Touch Cleaning	YTD cleaning	18,240	40,000		
IOP Payroll	YTD attendant	11,909	22,800		
		54,398	134,880		80,482
Beach Barrel & Front Beach Business District Trash Pickup					
JLG Enterprise LLC	YTD trash pickup per contract	48,690			
		48,690	85,000		36,310
Irrigation at Breach Inlet Sign					
IOP WSC	YTD irrigation	221			
		221	600		379
Beach Trash Barrels					
Zoro Tools	1 barrel	76			
		76	7,500		7,424
Repair 4500 linear feet of sidewalk in Front Beach Area					
		-			
		-	70,000	-	70,000
IOP website T-shirt Promo					
		-			
		-	15,000	-	15,000

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2022
 Fiscal Year Ending June 30, 2022

Vendor	Description	A Actual Expenditure	B FY2022 Budget	C Committee Approved	B+C-A (Over)/ Under
Charleston CVB - 30% Tourism Promotion Funds					
Charleston Area CVB	30% distribution for Sept Qtr	397,475			
Charleston Area CVB	30% distribution for Dec Qtr	160,292			
Charleston Area CVB	30% distribution for Mar Qtr	-			
Charleston Area CVB	30% distribution for Jun Qtr	-			
		557,766	675,474	-	117,708
Transfer to IOP Marina for 75% of Bond Debt Service					
		-	249,920	-	249,920
4th of July Fireworks - Year 2022					
Munnerlyn Pyrotechnics	deposit on 7/4/22 fireworks show	17,500			
		17,500	35,000	-	17,500
4th of July Fireworks - Year 2021 (cancelled due to Covid-19)					
	carryover from FY21			16,702	
Costco, Walmart, Sams	staff meal	798			
		798	-	16,702	15,904
Recreation Dept Replace or Add Playground Equipment as Needed					
8/10/21 Peggs Recreation	replace rusted part on Bongo equip	1,036			
		1,036	10,000	-	8,964
Sponsor Isle of Palms Beach Run (annually in July)					
IOP Rec Building Fund	annual sponsorship	-			
		-	3,000	-	3,000
Sponsor IOP Connector Run and Walk for the Child (annually in October)					
		-	7,500	-	7,500

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2022
 Fiscal Year Ending June 30, 2022

Vendor	Description	<i>A</i> Actual Expenditure	<i>B</i> FY2022 Budget	<i>C</i> Committee Approved	<i>B+C-A</i> (Over)/ Under
Music in the Park					
The Blue Plantation Band	deposit	400			
		400	4,000		3,600
Easter Egg Hunt					
		-	4,500		4,500
Fund Salary & Fringes for Police and all Beach Service Officers					
			201,137	-	201,137
Police Dept Body Armor					
Premier Body Armor	4 vests	3,053			
		3,053	7,100		4,047
Replace 2 Police Patrol Vehicles					
East Coast 911 Upfitters	equipment for two Durango SUVs	19,530			
		19,530	82,000		62,470
Digital License Plate Reader for parking enforcement					
		-	50,000		50,000
Police Department - replace Low Speed Vehicle					
Baker Motor Company	Polaris GEM E2 LSV	16,933			
		16,933	17,000		67

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2022
 Fiscal Year Ending June 30, 2022

Vendor	Description	A Actual Expenditure	B FY2022 Budget	C Committee Approved	B+C-A (Over)/ Under
Fire Dept Debt Service on 75' Ladder Truck					
Truist Governmental Finance	debt service principal & interest	91,915			
		91,915	91,915		0
Fire Dept 1/3rd of SCBA equipment replacement					
Safe Industries	replace SCBA equipment	96,739			
		96,739	96,667		(72)
Fire Dept replace 1 Pickup Truck					
			42,000		42,000
Fire Dept Replacement ATV					
John Deere Company	2022 John Deere Gator ATV	18,882			
		18,882	25,000		6,118
Fund Salaries & Fringes for the Fire Department					
			157,334	-	157,334
Public Works - Replace z-track mower					
STI Turf Care Equipment	52 Inch Toro Z-Track Mower	8,174			
		8,174	15,000		6,826

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2022
 Fiscal Year Ending June 30, 2022

		<i>A</i>	<i>B</i>	<i>C</i>	<i>B+C-A</i>
Vendor	Description	Actual Expenditure	FY2022 Budget	Committee Approved	(Over)/ Under
Unexpended Projects/Miscellaneous					
	2021 Carolina Coast Surf Club Surf Cam sponsorship	1,000		1,000	
	2021 VFW Post 3137 sponsorship	15,000			
	2021 MUSC Foundation/Lowvelo sponsorship	10,000			
	2022 IOP Community Corp LENS Program sponsorship	10,000			
	Budget provision for expenditures recommended by Atax Committee		50,000		
	Add/replace/maintain fixtures at Carmen Bunch Park		1,000		
	Marina Public Dock		150,000		
	Marina maintenance		50,000		
	Miscellaneous/undesignated		1,500		
		36,000	252,500	1,000	217,500
Grand Total		972,110	2,340,027	17,702	1,385,618

City of Isle of Palms

SC State Accommodations Tax - Distribution of Funds Received

	Dec-21	Sep-21	Total FY21	Jun-21	Mar-21	Dec-20	Sep-20	Total FY20	Jun-20	Mar-20	Dec-19	Sep-19	Total FY19	Jun-19	Mar-19	Dec-18	Sep-18	Total FY18
Total Payment Received From State	540,555	1,331,176	2,469,730	1,007,541	209,721	393,960	858,508	1,707,133	379,931	142,616	285,557	899,029	2,022,250	692,063	164,861	318,661	839,690	1,880,136
Percentage Increase from prior year	37%	55%	0	165%	47%	38%	-5%	-16%	-45%	-13%	-10%	7%	8%	8%	41%	0%	5%	3%
Less 1/4 of \$25,000 (transferred to Gen Fund)	6,250	6,250	25,000	6,250	6,250	6,250	6,250	25,000	6,250	6,250	6,250	6,250	25,000	6,250	6,250	6,250	6,250	25,000
Remainder	534,305	1,324,926	2,444,730	1,001,291	203,471	387,710	852,258	1,682,133	373,681	136,366	279,307	892,779	1,997,250	685,813	158,611	312,411	833,440	1,855,136
5% to General Fund	26,715	66,246	122,237	50,065	10,174	19,386	42,613	84,107	18,684	6,818	13,965	44,639	99,863	34,291	7,931	15,621	41,672	92,757
65% To Acc Tax Tourism Related	347,299	861,205	1,589,078	650,839	132,256	252,012	553,971	1,093,386	242,893	88,638	181,550	580,306	1,298,212	445,779	103,097	203,067	541,736	1,205,838
30% to Acc Tax Tourism Promotion (CVB):	160,292	397,475	733,416	300,387	61,041	116,313	255,674	504,640	112,104	40,910	83,792	267,834	599,175	205,744	47,583	93,723	250,032	556,541
	534,305	1,324,926	2,444,730	1,001,291	203,471	387,710	852,258	1,682,133	373,681	136,366	279,307	892,779	1,997,250	685,813	158,611	312,411	833,440	1,855,136

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: MUSC Hollings Cancer Center LOWVELO

B. Applicant Organization: MUSC Foundation

1. Mailing Address: 86 Jonathan Lucas st. ste 118 Charleston SC, 29425

Telephone: (843)494-4584 Email: haynier@musc.edu

2. Project Director: Rachel Haynie (event manager)

Telephone: (843)494-4584 Email haynier@musc.edu

3. Description of Organization, Its Goals and Objectives:

MUSC Hollings Cancer Center's LOWVELO will take place on November 5, 2022 on the beautiful Isle of Palms, South Carolina. LOWVELO is not just another ride. LOWVELO rallies the community together and encourages people of all walks of life and fitness levels to get physically active while supporting an incredible mission that impacts everyone – raising money for lifesaving cancer research. LOWVELO isn't just an event - it's a lifestyle. We are anticipating 1,000 riders will participate and raise over \$550,000 for cancer research at Hollings Cancer Center. On the big day Nov. 5, all participants will be able to join a big block party that includes food, vendors and live music. Other perks that all participants receive throughout the year include tips about cancer prevention and awareness as well as the latest advances in cancer care. In addition, participants can join lunch and learn sessions about creating a healthier lifestyle led by MUSC Wellness Center coaches and Hollings' Cancer Control researchers.

Every rider-raised dollar will support cancer research at Hollings Cancer Center. Located on the Medical University of South Carolina campus, Hollings Cancer Center is the state's only National Cancer Institute - designated cancer center and one of only 71 centers located across the country. Hollings Cancer Center plays a vital role in scientific breakthroughs in research and advances in treatments, while also providing the highest quality of care possible to our patients.

There will be an estimated 33,040 South Carolinians diagnosed with cancer this year. It is imperative to continue to raise funds for cancer research to help give our patients more time, more hope, and more treatment options.

C. Description and Location of Project:

LOWVELO will have options for everyone to participate. We offer longer routes for the avid cyclist as well as a family friendly island ride and stationary cycling classes. The 25-mile, 55-mile and 100-mile routes will leave from Downtown Charleston, cross the Ravenel Bridge, ride around Mount Pleasant, cruise Sullivan's Island and Isle of Palms, trek out to Francis Marion Forest, and finish on Ocean Blvd. for a block party celebration. In addition to those three routes for our more experienced riders, we'll also have a 10-mile ride and three outdoor stationary bike classes that will start on Isle of Palms. Each rider commits to a fundraising minimum depending upon their chosen distance, and 100% of the money they raise goes straight to cancer research at MUSC Hollings Cancer Center. In order to meet our goal of 100%, we rely on our partners to help underwrite the event costs. As part of overall event finale, we will be working with the IOP businesses to include them in the finale and offer them first right of refusal to cater the reception. We plan to utilize The Palms Oceanfront Hotel and Wild Dunes as a place for our riders to stay.

Single Event? Ongoing Event/Annual Need?

1. Date(s): of project/ event or start date: 11/5/22 Completion date: 11/5/22
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 (23%) compared to Isle of Palms residents (3%) vs. visitors from within 50 miles such as "day trippers" (74%)

This data is collected from our registration platform and after event survey.

*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 a percentage of 3% increase since 2019
*Source of tourist data registration platform and survey
(website tracking, surveys, lodging data, sales information, etc.)

4. Is your event to be conducted entirely on Isle of Palms? No If not, please set forth the percentage occurring on Isle of Palms, as well as the specific locations and the percentages occurring elsewhere.

The event will have longer routes that start Downtown. 50% of the participants will start on Isle of Palms and all finishers will complete the event for a block party on Isle of Palms.

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.

LOWVELO has grown by 33% in participation in the past 3 years. This is especially significant given the event had to go completely virtual due to the pandemic in 2020. We measure our success by community involvement which we had an increase of over 300% in sponsorships and by participant satisfaction and funds raised. We believe LOWVELO will bring in significant funding both for the Isle of Palms and Hollings Cancer Center for cancer research.

7. Describe fully how and why your proposed project/event qualifies for City of Isle of Palms ATAX funding. LOWVELO will utilize and support all businesses on the Isle of Palms as well as encourage all participants to stay at local hotels. All event staff (40+) will be lodging at The Palms hotel or another local establishment on The Isle of Palms as long as there is availability. We plan to have a block room rate at local hotels for participants. We will work with all local businesses to cross market and advertise LOWVELO 2022. We plan to maximize and increase heads in beds on Isle of Palms year over year.
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.

100% of all funds raised by our participants go directly to cancer research at Hollings Cancer Center. LOWVELO is a non-profit organization under the MUSC Foundation and therefore will not realize a profit from the event. The

expenses of the event are underwritten by sponsors and support of MUSC.

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.
 - Please 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.
 - 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 plan to have a block of rooms at the Palms Hotel on Ocean Blvd for all staff members. As well as work with Wild Duns to reserve and block rooms for both staff, VIP and participants.

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. *Please see attached impact report
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. *Please see attached demographics data sheet.
4. Set forth the number of attendees projected for this year's project/event, and well as the means of calculation. We expect 1,000 riders for this year's event. We project this number based off the percentage of growth LOWVELO has seen in the past 3 years. We also calculate this number using our online registration platform.

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? Our event is planned for November 5, 2022 (shoulder season).

5. 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.

We do not foresee any potential negative aspect for this year's LOWVELO. MUSC Hollings Cancer Center hires a professional logistics company, Medalist Sports to oversee all event details including but not limited to: safety, parking, rentals, crowd control and flow, noise ordinances, residential notifications, etc.

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.

LOWVELO 2022 has hired a professional marketing company, The Design Group to help broadcast the event both regionally and nationally. We will utilize digital, print, radio, and on-air advertising as well as cross marketing with our community partners.

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

1. Sponsorships or Fundraising: Amount \$545,000 From Beemok Family Foundation has committed to support half of the event's expenses, not to exceed \$700,000. \$10,000 from First Capital Bank. \$10,000 from WestEdge. \$25,000 from Dominion Energy. Other solicitations are in progress. _____

 2. Entry Fees : Amount \$50_____ From participants
 3. Donations: Amount \$ various amounts From donors
 4. Accommodations Tax Funds Request: Amount \$10,000
- Date(s) Required: 10/1/22 Lump Sum Installments _____

\$10,000

5. Other:

6. Total Funding: \$545,000 - \$750,000 Total Budget: \$900,000 - \$1,000,000

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

*Please see attached

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

Lump Sum(s): \$ 10,000 on 10/1/22 (date),
\$ _____ on _____ (date),
\$ _____ on _____ (date).

(1) 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):
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?

Yes, LOWVELO has had an initially meeting with the City of Isle of Palms and was approved. Feedback was extremely positive.

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 rely heavily on sponsorship funding to offset the cost of the event. We will continue to seek funding from local and regional businesses.

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.

LOWVELO does have liability insurance through USAC which provides \$1M in general liability and \$2M in umbrella insurance.

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, we assert LOWVELO will be a sustainable event as we are one of very few events that have seen growth coming off of the pandemic. We have grown 33% since 2019 an increase of over 200 participants for our 2021 LOWVELO.
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 grantfunding, 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.
 - Please see attached all benefits of partnership

Revised February 8, 2021

Category	Item	2022 DRAFT
		1,000 - 1,200 RIDERS
Friday Night Celebration	A/V and Stage, big screen	\$7,000.00
NOW Packet Pickup - Firefly	Talent & Entertainment	\$2,000.00
	Flowers	\$1,500.00
	Food & Beverage (Catering)	\$36,000.00
	Beer/Wine	\$5,000.00
	Invitations/Ticketing System	\$500.00
	Security	\$1,000.00
	Rentals - Tables and Chairs	\$2,000.00
	Venue Rental	\$5,000.00
		\$60,000.00
Start Line/Finish Line	A/V - Sound & Video Boards	\$3,000.00
	Food & Beverage/Participant Breakfast	\$6,000.00
	Food & Beverage/Participant Lunch	\$38,000.00
	Beer/Wine/Sodas	\$5,000.00
	Talent & Music - DJ	\$3,000.00
		\$55,000.00
Event/Venue Production		
<i>(Hagood Stadium and IOP)</i>	Event Venue Rental	\$6,000.00
	Tools, Equipment & supplies	\$5,000.00
	Golf Carts	\$1,500.00
	Parking Lot Attendants	\$1,500.00
	Parking	\$5,000.00
	Portable Toilets	\$10,000.00

	Portable Showers	\$0.00
	Light Towers	\$2,000.00
	Power/Generator	\$8,000.00
	Scissor Lift/Fork Lift Rental	\$0.00
	Site Cleanup	\$0.00
	Security Services (overnight/on-site)	\$3,000.00
	Big Screen Rental	\$6,000.00
	Trash Removal/Receptacles	\$2,000.00
	Tents, Tables, Chairs, stage, sound (all rentals)	\$30,000.00
	Start/Finish Stage	\$0.00
	Start/Finish Truss	\$0.00
	Stationary Bike Class (fans, pompom)	\$1,000.00
		\$81,000.00
Executive	Contingency	\$5,000.00
	Website	\$10,000.00
	General Administration	\$10,000.00
	Airfare for Consultants	\$2,000.00
	Legal	\$2,000.00
	Mileage/Expense/Parking	\$3,000.00
	Event Storage Unit	\$5,500.00
	USA Cycling Membership & Permit Fee	\$500.00
	Risk Management	\$10,000.00
		\$48,000.00
Rally's & Committee Meetings		
	LOC Meeting Food	\$5,000.00
		\$5,000.00
Marketing	Advertising	\$25,000.00
	Marketing Firm	\$20,000.00

	Graphic Designers	\$5,000.00
	Photography	\$1,000.00
	Printing	\$7,000.00
	Shipping	\$2,000.00
	Video/Documentary/Promotional Video	\$7,000.00
		\$67,000.00
Operations	Air Fare (Event Staff)	\$5,000.00
	Event Housing	\$18,000.00
	Gas & Tolls	\$3,000.00
	Per Diems	\$3,500.00
	Staff Ground Travel	\$2,000.00
	Vehicle Rental	\$18,000.00
	Pre- event travel expenses (housing, food, gas)	\$15,000.00
		\$64,500.00
Registration	Bibs	\$1,000.00
	Volunteer Software	\$1,000.00
	Participant T-Shirts	\$12,000.00
	Participant (and MUSC) Jerseys	\$70,000.00
	Goody Bags	\$5,000.00
	Swag	\$15,000.00
	Pre-event swag	\$6,000.00
	Awards & Gifts	\$20,000.00
		\$130,000.00
Sponsorship		

	Sales Materials & Presentations	\$500.00
	Sponsor/VIP Gifts (SWAG)	\$10,000.00
	Sponsor/Event Signage/Route Signage	\$16,000.00
		\$26,500.00
Staffing		
	LOWVELO Staff	\$225,000.00
	Consultants & temp staff	\$170,000.00
	Announcer 2	\$0.00
	Communications & Command	\$0.00
	Construction Crew	\$0.00
	Expo Director	\$0.00
	Expo Staff	\$0.00
	Inventory Manager	\$0.00
	Marshal Cord. & Captains	\$0.00
	Medical Coordinator	\$0.00
	Registration Coordinator	\$0.00
	Rest Stop Coordinator & Crew	\$0.00
	Routing & Signs Manager & Crew	\$0.00
	SAG/Box Truck Drivers	\$0.00
	Staging Crew	\$0.00
	Staging Manager & Crew	\$0.00
	Transportation Manager	\$0.00
	Volunteer Manager	\$0.00
		\$395,000.00
Technical	Bike Racks	\$1,000.00
	Communication Equipment Rental	\$2,000.00
	Crowd Control Fencing	\$12,000.00
	DOT Costs (State, Local & Equip)	\$12,000.00
	Emergency Transportation	\$0.00
	EMT Services	\$1,000.00
	Logging/Software	\$500.00
	Maps	\$500.00
	Medical Supplies	\$1,000.00

	Cleaning Company	\$1,000.00
	Neutral Support/SAG	\$0.00
	Permits	\$500.00
	Police Cost (State & local)	\$17,000.00
	Rest Stop Food & Supplies	\$7,000.00
		\$55,500.00
Recruitment	Recruitment events	\$10,000.00
	Credit Card fees	\$10,000.00
	Foundation \$ Fee - 1.5%	\$15,000.00
	Post-Event Award Reception	\$25,000.00
		\$60,000.00
Volunteers		
	Volunteer Food & Water (box lunches)	\$3,000.00
	Volunteer T-Shirts	\$3,500.00
		\$6,500.00
	Total	\$1,054,000.00

Operations/Event total
(Technical,
Production,Executive,
volunteers, Startline/finishline,
registration and Friday night
event)

\$505,500.00

Admin total (staff, consultants,
Marketing/ Adv. Total
(Recruitment, marketing,
sponsorship)

\$395,000.00

\$153,500.00

Benefit	Presenting	Premier	Platinum	Gold	Silver	Bronze	Signature
Presented by Company Name in Title							
Expo Tent on MUSC Day							
Social Media Recognition							
Event T-shirt	Logo	Logo	Logo	Logo	Logo	Name	Name
Logo on Jersey**							
Logo on Website							
Logo on Event Emails							
Logo on Photo Background							
Logo on Start Line Truss (Horizontal)							
Logo on Start Line Truss (Vertical)							
Logo on Mesh Signage at Start Lines							
Logo on Mesh Signage at Finish Lines							
Event Program	Logo	Logo	Logo	Logo	Logo	Name	Name
Logo on Event Screens	Solo	Solo	Solo	Solo	Group	Group	Group
Opportunity to provide swag to riders ~1,000 pieces							
Opportunity to provide digital promo to riders & volunteers							
Logo on volunteer shirts ~ 250							

Benefit	Presenting	Premier	Platinum	Gold	Silver	Bronze	Signature
Complimentary rider registrations*	25	20	15	10	8	5	3
Promoted through Strava							
VIP parking on Sat.							
VIP rider check-in							
Training Rides Sponsored by (company name)							
Recognition in HCC Newsletter (digital)							
HCC lunch 'n learn							
Logo included on Advertising							
Opportunity to staff and decorate a rest stop							
Changing What's Possible in Cancer Care							

Disclaimer: These sponsorship benefits are subject to change if this year's in-person event ends up being canceled due to COVID-19. Our riders and volunteers' safety and well-being are our top priority. Our modified, live event is planned in conjunction with COVID-19 safety protocols, and will be ever evolving. Our planning decisions are being guided by MUSC medical experts and public health guidelines, and we will keep participants and sponsors readily informed.

*Riders are still required to fundraise.

**Jerseys will be available for purchase & partnerships must be confirmed 8 weeks prior to event.



MUSC HOLLINGS CANCER CENTER



Ride Impact 21

By the Numbers



▶ **821**
participants



▼ **83**
teams



▶ **\$1.3M**
total raised



▼ **249**
MUSC
572
non-MUSC



▶ **200**
volunteers



▶ **24%**
from outside
Tri-county area

Forward Progress

Change from 2019 to 2021

+33%
participants

+50%
route options

+280%
sponsorships



Total Funds Raised



\$1,356,017

FUNDRAISING

\$551,017

\$671 average raised

38% % over goal

12 High Tide Club members*

*raised \$5,000+

SPONSORSHIPS

\$805,000

\$720K cash

\$85K in-kind

\$10K average sponsorship



Participant Breakdown

Stationary Bike	54	Male	419	Female	402
10-Mile Ride	385				
22-Mile Ride	198	Returning	257	New	564
57-Mile Ride	124				
100-Mile Ride	60	In-Person	687	Virtual	134
Total	821				

Impacting Cancer Research

One of LOWVELO's first research grants was issued in 2021 — \$50,000 for a Hollings project to create purified versions of CAR-T-cells, which are used to treat certain leukemia and lymphoma patients. The goal of the project is to reduce the side effects associated with CAR-T-cell therapy and potentially make it more effective. By building up its own program, Hollings will make this cutting-edge treatment much more accessible to patients in South Carolina.



CAR-T-cells are programmed to attack and kill cancer cells.





MUSC HOLLINGS CANCER CENTER

 **LOWVELO**

2022 Partnership Playbook

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Raymond N. DuBois, M.D., Ph.D.
MUSC Hollings Cancer Center Director

“100% of participant-raised dollars are used for cancer research to improve the ways that we can more effectively treat our cancer patients now and in the future and to achieve better results with health disparities.”

**We want to improve our
services and treatments
to advance and unite in the
fight against cancer.**

About **LOWVELO**

LOWVELO is:

No ordinary bike ride.

A grassroots event that raises money for innovative and lifesaving cancer research at MUSC Hollings Cancer Center in Charleston, SC.

A fun ride geared towards all fitness levels ages 8 and up to celebrate those who have fought and continue to fight cancer.

A dedicated group of riders, volunteers, virtual participants and staff members who are driven by compassion and a determination to end cancer.

A moment to honor, support and celebrate our patients of the past, today and tomorrow.

An event designed to bring communities together from throughout the state and beyond to rally together to end cancer.

An opportunity for each rider to commit to the cause by fundraising a minimum amount based on their chosen distance: 10 miles, 25 miles, 55 miles, 100 miles, or an outdoor stationary bike class.

An opportunity to provide a sustainable source of research funding to connect, engage and synergize cancer research at Hollings.



A guarantee that 100% of every participant-raised dollar will go directly to cancer research. The money raised will be the catalyst for groundbreaking and lifesaving projects that will impact cancer care across the state and country.

On Saturday morning, our riders embark on one of four routes or in a cycling class, as we put our best foot forward in the name of cancer research. The ride culminates in true Charleston fashion with a finish line celebration to remember.

A platform to form lasting corporate and community partnerships and forge friendships for one great cause.



Denis Guttridge, Ph.D., director of Darby Children's Research Institute and associate director of Translational Sciences at MUSC Hollings Cancer Center, participates in LOWVELO every year. Here's what he has to say:

Forge friendships for one great cause.

“Research isn't done in a silo. It takes the collaboration of an entire team, from the scientists and their labs who make the discoveries, to the physicians and their staffs who pull those discoveries into the hospital for our patients. The efforts are always in sync, and that's exactly why we have LOWVELO.

For me, being on the bike with a team supporting each other is absolutely no different than my lab and my collaborator in the clinic working together to make that next discovery possible for our cancer patients in South Carolina. I believe in my core that this is the only way a comprehensive cancer center should function.”



Power the Movement

As a partner in LOWVELO, you are powering the movement to fund cancer research at MUSC Hollings Cancer Center. Hollings is the only National Cancer Institute-designated cancer center in the state of South Carolina and one of only 71 in the country. The collaborative research environment is focused on the causes, prevention, treatment, outcomes and survivorship of cancer. Your partnership will underwrite the event costs and allow us to donate 100% of the participant-raised dollars (**over \$1.3M since 2019!**) straight to the scientists.

Your partnership is the fuel for innovative research.

Together we can change what's possible in cancer care!

Choose your partnership level to join us.

The partnership benefits, listed below, will be presented on a tiered basis based on the partnership level that's chosen. All riders are still responsible for their fundraising minimums. We are happy to customize any item for you and make this a unique experience for you and your company!

Partnerships may be monetary or in-kind.

*This level may be customized

Presenting Partner (exclusive)

Sold

Premier Partner* (non-exclusive)

\$100,000

Platinum Partner* (non-exclusive)

\$50,000

Gold Partner* (non-exclusive)

\$25,000

Silver+ Partner* (non-exclusive)

\$15,000

Silver Partner (non-exclusive)

\$10,000

Bronze Partner (non-exclusive)

\$5,000

Signature Partner (non-exclusive)

\$2,500

Benefit	Presenting	Premier	Platinum	Gold	Silver & Silver+	Bronze	Signature
Presented by Company Name in Title							
Expo Tent at packet pick-up party & ride day							
Social Media Recognition							
Event T-shirt	Logo	Logo	Logo	Logo	Logo	Name	Name
Logo on Jersey**							
Logo on Website							
Logo on Event Emails							
Logo on Rider Numbers							
Logo on Start Line Truss (Horizontal)							
Logo on Start Line Truss (Vertical)							
Logo on Mesh Signage at Start Lines							
Logo on Mesh Signage at Finish Lines							
Event Program	Logo	Logo	Logo	Logo	Logo	Name	Name
Logo on Event Screens	Solo	Solo	Solo	Solo	Group	Group	Group
Opportunity to provide swag to riders ~1,000 pieces							
Opportunity to provide digital promo to riders & volunteers							
Logo on volunteer shirts ~ 250							

Benefit	Presenting	Premier	Platinum	Gold	Silver	Bronze	Signature
Complimentary rider registrations*	unlimited	100	50	30	15	5	3
Promoted through Strava							
VIP parking on Sat.							
VIP rider check-in							
Training Rides Sponsored by (company name)							
Recognition in HCC Newsletter (digital)							
Opportunity to host lunch 'n learn							
Logo included on Advertising							
Opportunity to staff and decorate a rest stop							
Changing What's Possible in Cancer Care							

Disclaimer: These sponsorship benefits are subject to change if this year's in-person event ends up being canceled due to COVID-19. Our riders and volunteers' safety and well-being are our top priority. Our modified, live event is planned in conjunction with COVID-19 safety protocols, and will be ever evolving. Our planning decisions are being guided by MUSC medical experts and public health guidelines, and we will keep participants and sponsors readily informed.

*Riders are still required to fundraise.

**Partnership must be confirmed by September 1, 2022



**On behalf of our
mothers, fathers,
brothers, sisters,
children, friends,
coworkers and
neighbors who
have been touched
by cancer.**

Let's join together to change what's
possible in cancer care and be part
of the cure.

About Hollings

MUSC Hollings Cancer Center

At Hollings, specialists across more than 20 academic departments join forces to study and treat cancer from diverse perspectives. Our four research programs include cancer biology, cancer control, cancer immunology, and developmental cancer therapeutics to create new and better methods for preventing and treating this complex disease.

With an annual research funding portfolio of more than \$44 million and more than 200 clinical trials, Hollings focuses on getting this research to where it matters most: in clinics for the benefit of cancer patients. We are dedicated to developing epidemiologic, environmental, and behavioral research to reduce the cancer burden and disparities in South Carolina, with a focus on underserved and rural areas.

Hollings offers clinical expertise and advanced technology that's only available at the nation's best hospitals, including offering the first CAR-T therapy in the state in 2019 and providing multidisciplinary scientific tumor boards to review cancer cases. As part of an elite network of 71 NCI-designated cancer centers across the nation since 2009, Hollings has teams of health professionals from basic researchers to clinicians who collaborate to accelerate scientific discoveries and offer cancer patients more and better treatment options.

As part of our 100% to cancer research model, LOWVELO supports fellows who are conducting cancer research as part of their postgraduate and postdoctoral educations. Their research aims to impact translational work to advance new treatments for our patients. Together, we can change what's possible.



Hollings Cancer Center
An NCI-Designated Cancer Center

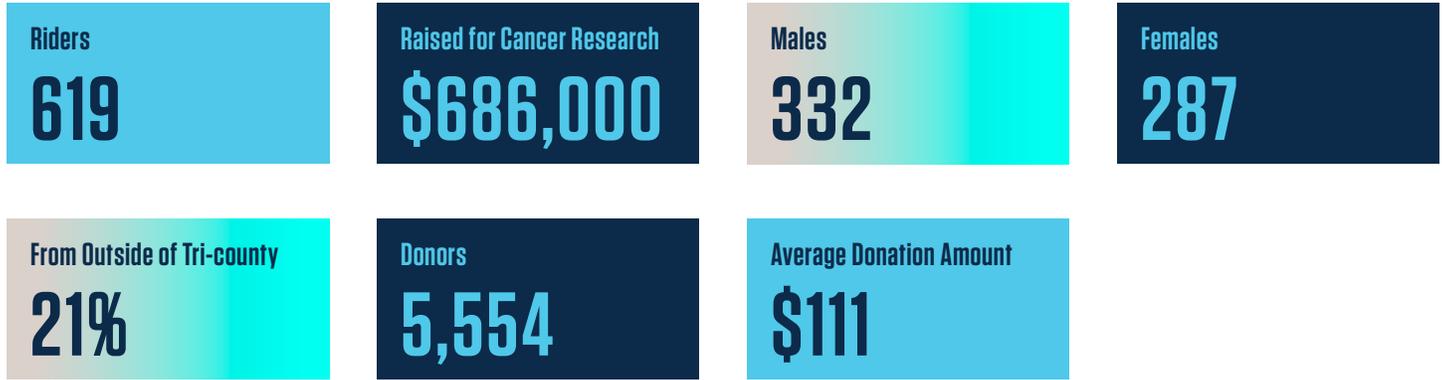
Want to know more?

Check out the exciting advances happening at Hollings by visiting our news center:

hollingscancercenter.musc.edu/news

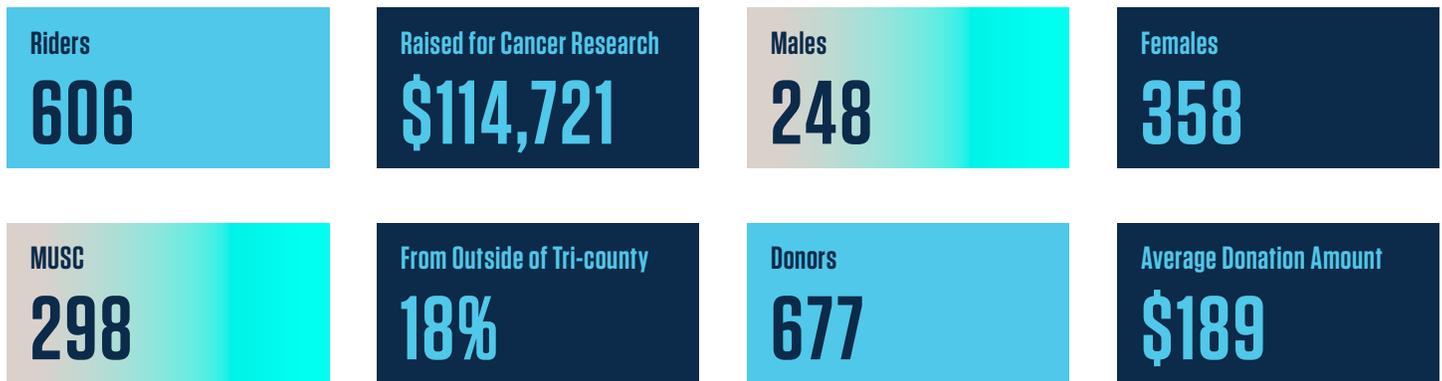
By the Numbers

LOWVELO 2019



LOWVELO 2020

Because of COVID-19, we made LOWVELO20 a virtual event to maintain our momentum and keep participants safe.



LOWVELO 2021





2022 Partnership Playbook

For more information regarding partnership opportunities, please contact Rachel Haynie at 843-494-4584 or haynier@muscc.edu.

@LOWVELO #LOWVELO #LOWVELO22



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: Isle of Palms Chamber of Commerce Website Development

B. Applicant Organization: Isle of Palms Chamber of Commerce

1. Mailing Address: 1304 Palm Blvd., Isle of Palms, SC 29451

Telephone: 843-224-7280 Email: sandy@islandrealty.com

2. Project Director: Katrina Limbach

Telephone: 810-531-3644 Email katrina@iopbeachchair.com

3. Description of Organization, Its Goals and Objectives:

The Isle of Palms Chamber of Commerce advocates to advance commerce by serving residents and guest by working with the marketing and web-site development team of Blue Ion. Blue Ion is a full-service creative and digital marketing agency committed to helping visionary brands share the energy they're made of.

C. Description and Location of Project:

The development of the website by the Isle of Palms Chamber of Commerce with the help from the professional team of Blue Ion that currently hosts the Charleston CVB website and marketing will help to build a healthy economy for our businesses and improve the quality of life for residents and visitors.

Single Event? Ongoing Event/Annual Need?

1. Date(s): of project/ event or start date: April 2022 Completion date: June 2022
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 (50 %) vs. visitors from within 50 miles such as “day trippers” (25 %)
Anticipated impact based on current market conditions. Once the website is running more data will be available to share with the community.
*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? N/A
*Source of tourist data N/A
(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.
No, Currently, only the Charleston CVB, many of those visiting the site will be tourism guests
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. Basing our need and success on the success of the CVB's website and individual licensed IOP businesses

7. Describe fully how and why your proposed project/event qualifies for City of Isle of Palms ATAX funding. The site will enhance the visitor's knowledge of businesses & 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? no profit
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.

This is a start-up venture for the new Isle of Palms Chamber of Commerce. The budget is in development.

Additional monies for this website will be granted from its members and member sponsors.
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. N/A
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. N/A
4. Set forth the number of attendees projected for this year's project/event, and well as the means of calculation. N/A

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? This website will be in place for years to come.
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.

The site will help to guide guests visiting the island all year long, "Our vibrant island lifestyle is always in season"

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 Isle of Palms Chamber of Commerce is newly formed and is working to be known through the website and social media

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

1. Sponsorships or Fundraising: Amount \$ _____ From _____

2. Entry Fees : Amount \$ _____ From _____

3. Donations: Amount \$ _____ From _____

4. Accommodations Tax Funds Request: Amount \$

Date(s) Required: Lump Sum Installments _____

5. Other:

6. Total Funding: Total Budget:

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

Projected costs for website development and social media presence are expected to be in the \$50,000 annually.

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

(1) Lump Sum(s): \$ 10,000 on April 15, 2022 (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 X _____
 - Other (Please Explain): _____

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?

The IOPCC and its board have been in touch with the City Administrator and council members who have encouraged the development.

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.
The Chamber will have additional revenue from its members and sponsors
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. N/A
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. There is a firm commitment from the Board of Directors for the Chamber to succeed
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.
recognition on the website of all sponsors

	A	B	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	DRAFT #2	CITY OF ISLE OF PALMS STATE ACCOMMODATIONS TAX FUND															
2	GL Number	Description	ACTUAL FY18	ACTUAL FY19	ACTUAL FY20	ACTUAL FY21	BUDGET FY22	YTD As Of 12/31/2021 (6 MOS)	Jan-Dec 2021 (12 MOS)	FORECAST FY22	INCREASE/ (DECR) FROM FY22 BUDGET	BUDGET FY23	INCREASE/ (DECREASE) FROM FY22 BUDGET	FORECAST FY24	FORECAST FY25	FORECAST FY26	FORECAST FY27
46	PUBLIC WORKS																
47	50-4620.5026	MAINT & SERVICE CONTRACTS	-	28,750	-	-	-	-	-	-	-	-	-	-	-	-	-
48	50-4620.5065	PROFESSIONAL SERVICES	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
49	50-4620.5079	MISCELLANEOUS	13,889	3,972	4,444	5,643	7,500	76	5,719	7,500	-	7,500	-	7,500	7,500	7,500	7,500
50	50-4620.5085	CAPITAL OUTLAY	4,661	199,605	32,068	32,420	15,000	-	32,774	15,000	-	37,000	22,000	112,000	37,600	58,400	23,400
51	SUBTOTAL PUBLIC WORKS		18,550	232,326	36,511	38,063	22,500	76	38,493	22,500	-	44,500	22,000	119,500	45,100	65,900	30,900
52	% Increase/(Decrease) from Prior Y		45%	1152%	-84%	4%	-41%					98%		169%	-62%	46%	-53%
54	RECREATION																
55	50-4820.5025	NON-CAPITAL TOOLS & EQUIPMENT	1,273	-	4,114	-	-	-	-	-	-	-	-	-	-	-	-
56	50-4820.5026	MAINT & SERVICE CONTRACTS	-	30,237	-	1,158	-	-	1,158	-	-	-	-	-	-	-	-
57	50-4820.5085	CAPITAL OUTLAY	39,109	(5,804)	-	-	10,000	1,036	(122)	10,000	-	112,000	102,000	43,800	14,600	31,400	265,600
58	50-4830.5092	SPECIAL ACTIVITIES	45,564	13,050	7,500	10,537	16,000	-	10,446	16,000	-	16,500	500	16,500	16,500	16,500	16,500
59	SUBTOTAL RECREATION		85,946	37,483	11,614	11,695	26,000	1,036	11,482	26,000	-	128,500	102,500	60,300	31,100	47,900	282,100
60	% Increase/(Decrease) from Prior Y		26%	-56%	-69%	1%	122%					394%		-53%	-48%	54%	489%
62	FRONT BEACH AND FRONT BEACH RESTROOMS																
63	50-5620.5020	ELECTRIC AND GAS	641	492	613	709	500	270	665	500	-	700	200	700	700	700	700
64	50-5620.5022	WATER AND SEWER	9,321	9,642	10,106	10,333	12,000	5,932	10,955	12,000	-	12,000	-	12,000	12,000	12,000	12,000
65	50-5620.5026	MAINT & SERVICE CONTRACTS	4,917	3,041	3,648	9,896	45,000	2,419	8,255	45,000	-	45,000	-	45,000	45,000	45,000	20,000
66	50-5620.5044	CLEANING/SANITARY SUPPLY	5,656	7,527	6,505	7,252	7,500	4,445	9,242	7,500	-	10,000	2,500	10,000	10,000	10,000	10,000
67	50-5620.5062	INSURANCE	5,003	5,912	6,235	7,079	7,500	4,829	7,305	7,500	-	8,100	600	8,262	8,427	8,596	8,596
68	50-5620.5065	PROFESSIONAL SERVICES	70	80	80	348	80	-	348	80	-	80	-	80	80	80	80
69	50-5620.5067	CONTRACTED SERVICES	115,853	129,715	123,175	110,735	125,000	51,629	107,658	125,000	-	125,000	-	125,000	125,000	125,000	125,000
70	50-5620.5079	MISCELLANEOUS	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
71	50-5620.5084	CONSTRUCTION IN PROGRESS	4,226	-	-	-	-	-	-	-	-	-	-	-	-	-	-
72	50-5620.5085	CAPITAL OUTLAY	388,348	57,410	-	-	70,000	-	-	70,000	-	70,000	-	70,000	170,000	70,000	175,000
73	SUBTOTAL FR BEACH RESTRMS		534,035	213,819	150,363	146,353	267,580	69,523	144,427	267,580	-	270,880	3,300	271,042	371,207	271,376	351,376
74	% Increase/(Decrease) from Prior Y		115%	-60%	-30%	-3%	83%					1%		0%	37%	-27%	29%
76	TOTAL STATE ATAX FUND EXPENDITURES		1,396,215	1,344,560	1,497,952	1,582,850	1,505,836	591,801	1,616,007	1,680,846	175,010	1,739,523	233,687	1,565,115	1,559,742	1,539,109	1,964,651
77	% Increase/(Decrease) from Prior Y		28%	-4%	11%	6%	-5%			12%		16%		-10%	0%	-1%	28%
79	NET INCOME BEFORE TRANSFERS		401,550	589,992	126,496	743,030	640,664	667,862	1,175,527	1,116,507	475,843	880,015	239,351	1,106,770	1,165,537	1,240,632	870,640
81	TRANSFERS																
82	50-3900.4901	OPERATING TRANSFERS IN	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
83	50-3900.5901	OPERATING TRANSFERS OUT	(768,513)	(577,410)	(258,667)	(625,523)	(834,191)	(9,747)	(635,270)	(834,191)	-	(1,558,465)	(724,274)	(709,096)	(1,454,822)	(720,353)	(933,926)
84	NET TRANSFERS IN/(OUT)		(768,513)	(577,410)	(258,667)	(625,523)	(834,191)	(9,747)	(635,270)	(834,191)	-	(1,558,465)	(724,274)	(709,096)	(1,454,822)	(720,353)	(933,926)
86	NET INCOME AFTER TRANSFERS		(366,964)	12,582	(132,171)	117,507	(193,527)	658,115	540,257	282,316	475,843	(678,450)	(484,923)	397,674	(289,285)	520,279	(63,286)
88	ENDING FUND BALANCE		1,800,453	1,813,034	1,680,863	1,798,370	1,604,844			2,080,687		1,402,237		1,799,911	1,510,625	2,030,904	1,967,618

	W	X
1	CITY OF ISLE OF PALMS STATE ACCOMMODATIONS TAX FUND	
2	NOTES	
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5	STATE ACCOMMODATIONS TAX FUND REVENUES	
6	ACCOMMODATION TAX-RELATED	Budget based on actual last 12 month revenues. Long-term forecast increases by 2% per year. Added revenue from the new Wild Dunes hotel in FY22.
7	ACCOMMODATION TAX-PROMO	Budget based on actual last 12 month revenues. Long-term forecast increases by 2% per year. Added revenue from the new Wild Dunes hotel in FY22.
8	MISCELLANEOUS INCOME	
9	SALE OF ASSETS	
10	INTEREST INCOME	
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14	GENERAL GOVERNMENT	
15	BANK SERVICE CHARGES	
16	WATER AND SEWER	Irrigation at Breach Inlet sign
17	NON-CAPITAL TOOLS & EQUIPMENT	Add/replace/maintain benches, etc at Carmen R Bunch and Leola Hanbury parks. Provision for addition/maintenance of beach wheelchairs (\$5k)
18	ADVERTISING	
19	PROFESSIONAL SERVICES	
20	PROGRAMS/SPONSORSHIPS	Provision for events and sponsorships approved by the Accommodations Tax Advisory Committee (\$50,000) and July 4th Fireworks show (FY21 show cancelled).
21	MISCELLANEOUS	
22	CAPITAL OUTLAY	
23	TOURISM PROMOTION EXP	Includes State-mandated 30% transfer (\$826.5k) to one or more DMOs (Designated Marketing Organizations) that have an "existing, ongoing tourism promotion program". City Council could continue to designate the Charleston Area CVB/Explore Charleston as the City's only DMO and/or designate another organization that meets the State's requirements. Also includes \$15k for City Hall visitor T-shirt program.
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27	POLICE	
28	NON-CAPITAL TOOLS & EQUIPMENT	Body armor as needed (\$7k). FY23 includes purchase of a portable radar sign for traffic control (\$3.5k)
29	MAINT & SERVICE CONTRACTS	
30	PROFESSIONAL SERVICES	
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32	CAPITAL OUTLAY	FY23 incl repl of 2 patrol SUVs (\$90k), one license plate readers (LPR) for parking enforcement (\$60k) and repl of one low speed vehicle/LSV (\$18k). Forecast periods = 20% of the annual Police Dept capital needs per the 10-yr plan
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36	FIRE	
37	DEBT SERVICE - PRINCIPAL	Debt service for new 75' ladder truck
38	DEBT SERVICE - INTEREST	Debt service for new 75' ladder truck
39	NON-CAPITAL TOOLS & EQUIPMENT	
40	MAINT & SERVICE CONTRACTS	
41		
42	CAPITAL OUTLAY	FY23 incl repl of mobile radio repeater (only with failure-\$17k), repl 1 personal watercraft/jet ski (\$18k), repl 1 utility vehicle/ATV for beach patrol (\$22k) and 25% of cost to purchase 2nd set of bunker gear for all personnel (\$34k). Forecast periods = 20% of the annual Fire Dept capital needs per the 10-yr plan.
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CITY OF ISLE OF PALMS STATE ACCOMMODATIONS TAX FUND

NOTES

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46 PUBLIC WORKS

47 MAINT & SERVICE CONTRACTS

48 PROFESSIONAL SERVICES

49 MISCELLANEOUS Annual provision for beach trash cans.

50 CAPITAL OUTLAY FY23 incl replacement of a 2014 Ford F-150 pickup truck (\$37k). Forecast periods = 20% of Public Works 10 Year Capital Plan totals for non-drainage related capital expenses.

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54 RECREATION

55 NON-CAPITAL TOOLS & EQUIPMENT

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57 CAPITAL OUTLAY FY23 incl replacement of playground equipment and/or scoreboards if needed (\$15k), replace front beach Christmas tree (\$22k), 1/3 of cost to reconstruct outdoor basketball courts (\$50k) and 1/3 of cost to create 2 Pickleball courts. Forecast period annual amts = 20% of 10 Yr Cap Plan totals

58 SPECIAL ACTIVITIES Connector Run (\$7,500), Easter egg hunt (\$4,500), music event (\$4,500).

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62 FRONT BEACH AND FRONT BEACH RESTROOMS

63 ELECTRIC AND GAS

64 WATER AND SEWER Includes outside showers

65 MAINT & SERVICE CONTRACTS Includes \$20,000 for maintenance of public restrooms and \$25,000 to rehab approx 250 Lft of white fencing in front beach areas (FY23-FY26).

66 CLEANING/SANITARY SUPPLY Supplies for front beach restrooms

67 INSURANCE

68 PROFESSIONAL SERVICES Backflow tests

69 CONTRACTED SERVICES Includes \$40k for year-round cleaning and maintenance of public restrooms and \$85k year-round business district (on street) & beach trash collection. Cost of PT attendant (\$23k) is now included in the General Fund, but offset by a Transfer In from the State Atax Fund.

70 MISCELLANEOUS

71 CONSTRUCTION IN PROGRESS

72 CAPITAL OUTLAY FY23 - FY26 includes \$70k per year to repair 4500 linear ft of sidewalks on Ocean Blvd between 10th and 14th (1/5 or 900 linear ft per year). Resurface City-owned parts of Ocean Blvd in FY25(\$100k) and repl irrigation system in FY27(\$175k).

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81 TRANSFERS

82 OPERATING TRANSFERS IN

OPERATING TRANSFERS OUT Incls xfers to Gen Fund for 2 firefighters (\$161k), 1 police officer (\$82k), 100% of BSOs (\$103k), Police OT (\$20k), and Front Beach restroom attendant (\$24k). Also includes 75% of annual debt svc on Marina dock bond (\$250k), Marina maintenance (\$50k) and Beach Run sponsorship (\$3k). FY23 Incls transfers to Marina fund (\$864k) for approx 40% of improves to the Public Dock and T-dock on the ICW. \$750k in FY25 for 50% of Marina dredging and \$225k in FY27 for 50% of bulkhead recoating if necessary.

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