



**SPECIAL CITY COUNCIL MEETING -- WORKSHOP**  
**5:00pm, Tuesday, March 11, 2025**  
**City Hall Council Chambers**  
**1207 Palm Boulevard, Isle of Palms, SC**

**Public Comment:**

All citizens who wish to speak during the meeting must email their first and last name, address, and topic to Nicole DeNeane at [nicoled@iop.net](mailto:nicoled@iop.net) no later than 3:00 p.m. the business day before the meeting. Citizens may also provide public comment here:

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

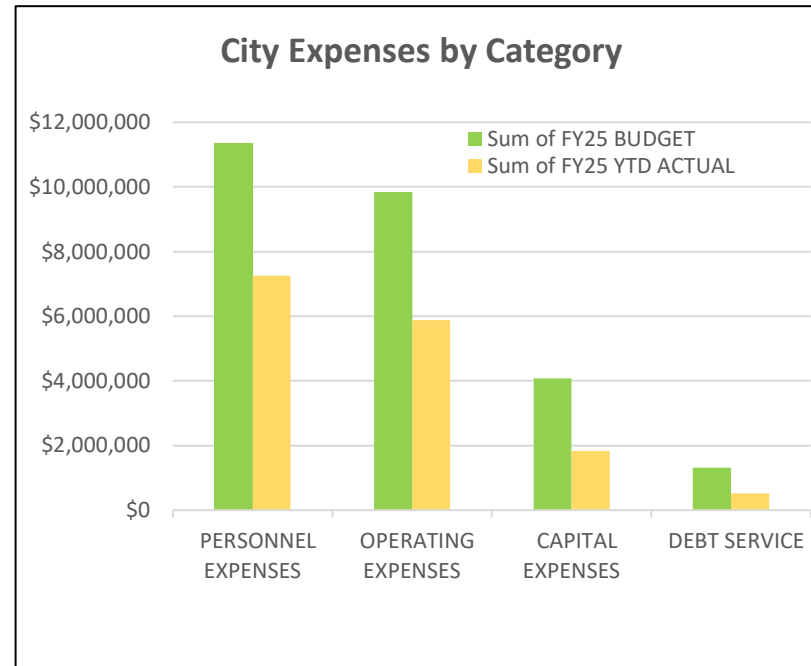
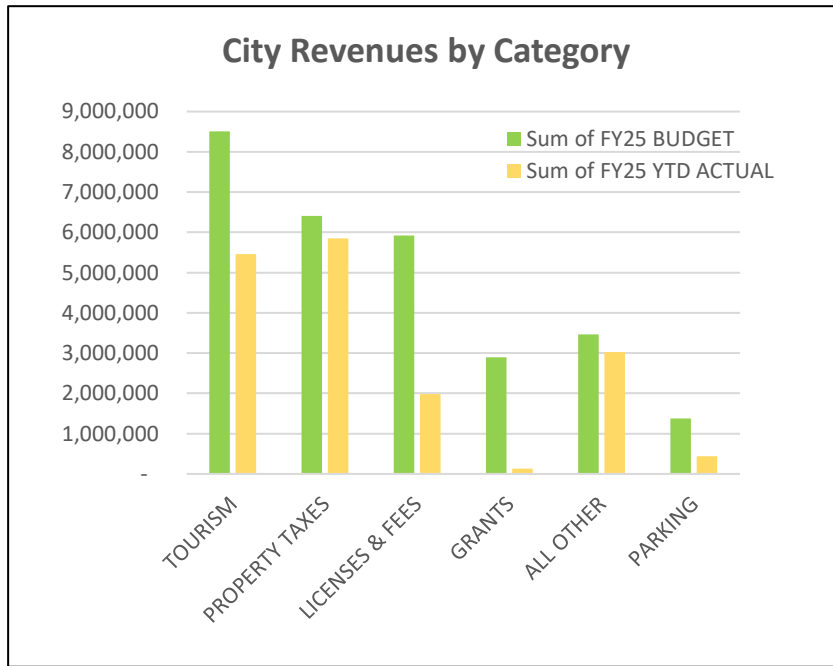
**Agenda**

1. **Call to Order** and acknowledgement that the press and public were duly notified of the meeting in accordance with the Freedom of Information Act.
2. **Citizens' Comments** - Citizens must state their name and address. All comments will have a time limit of three (3) minutes
3. **Special Presentations** – Sea Level Rise Adaptation Plan, Seamon Whiteside  
<https://www.iop.net/sea-level-rise-adaptation-plan>
4. **Dashboard of City Operations and Short-Term Rental Report** (p3-4)
5. **Departmental Reports** (p5-25)
6. **Financial Review** - financial statements and project worksheets (p26-52)
7. **Procurement**
  - a. Discussion of purchase of Public Works Director Truck, \$43,444, Ford of Spartanburg, State Contract (FY25 Budget, Hosp. Tax, \$38,000) (p53-54)
  - b. Discussion of purchase of 1100 roll out carts, \$74,809.09 – Amick Equipment, sole source contract (FY25 Budget, Gen. Fund, \$100,000) (p55)
  - c. Discussion of purchase of 1100 roll out cart assembly and delivery, \$14,025 – Container Pros (FY25 Budget, Gen. Fund, \$100,000) (p56-61)
  - d. Discussion of award of contract for palm tree trimming- \$28,080- Planet Green Landscaping (FY25 Budget, Muni. Atax, \$34,000) (p62-66)
8. **Capital Projects Update** (p67-69)
  - a. Drainage
    - i. Waterway Boulevard Multi-use Path Elevation Project
    - ii. Phase 4 Drainage – Palm Boulevard between 38th and 41st Avenue
  - b. IOP Marina

- i. Public Dock Greenspace
    - ii. Marina Dredging
  - c. Beach Maintenance & Access Improvements
    - i. IOP County Park Emergency Vehicle Access
    - ii. Beach Access Paths Improvements
    - iii. Beach Restoration
  - d. Buildings & Facilities
    - i. City Hall Renovation
    - ii. Undergrounding Power Lines
    - iii. SCDOT Palm Boulevard Bike, Pedestrian and Parking Enhancements
    - iv. 21st Avenue sidewalk repair and extension
- 9. **Strategic Plan Policy Initiatives and Priorities**
  - a. Livability- Review of the scope of walkability study (p70-74)
  - b. Environmental
  - c. Public Services
    - i. Discussion of MOU with Charleston County PRC for future maintenance of emergency beach access path (p75-77)
    - ii. Discussion of Ordinance 2025-02 – Parking (p78)
    - iii. Discussion of mutual aid agreement with the Aviation Authority (p79-82)
  - d. Personnel
  - e. Other items for discussion
    - i. Update on search for federal lobbyist (p83-116)
    - ii. Discussion of surfing instruction applications (p117-143)
- 10. **Legislative Report**
- 11. **Adjournment**

# City of Isle of Palms Operations Dashboard

## February 2025

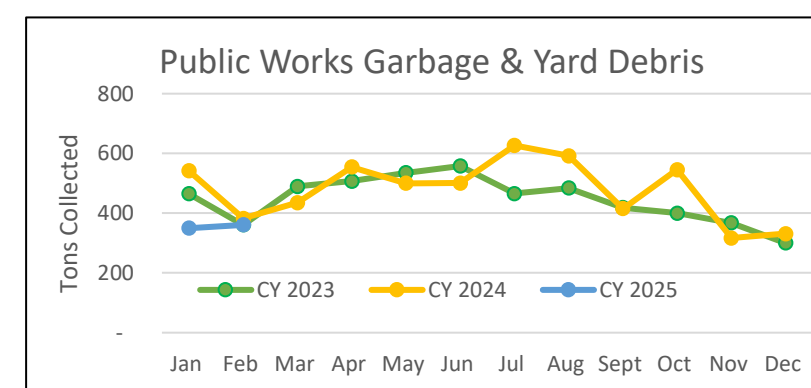
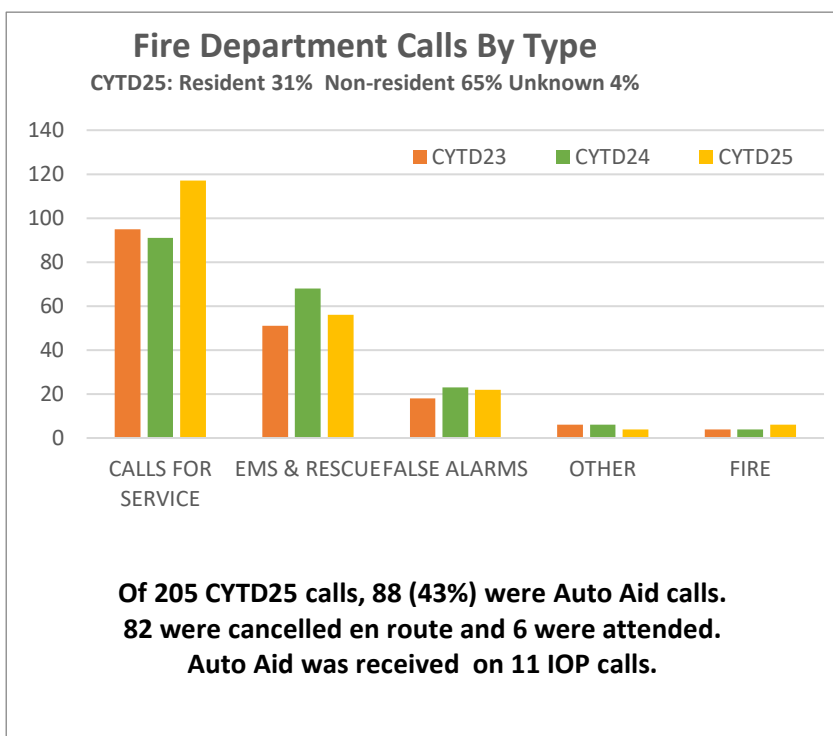
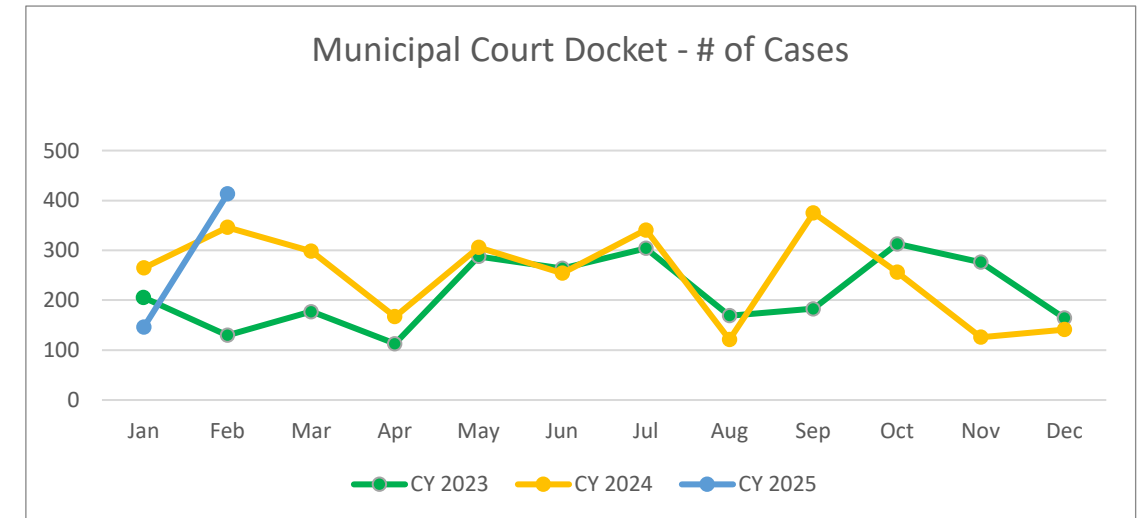
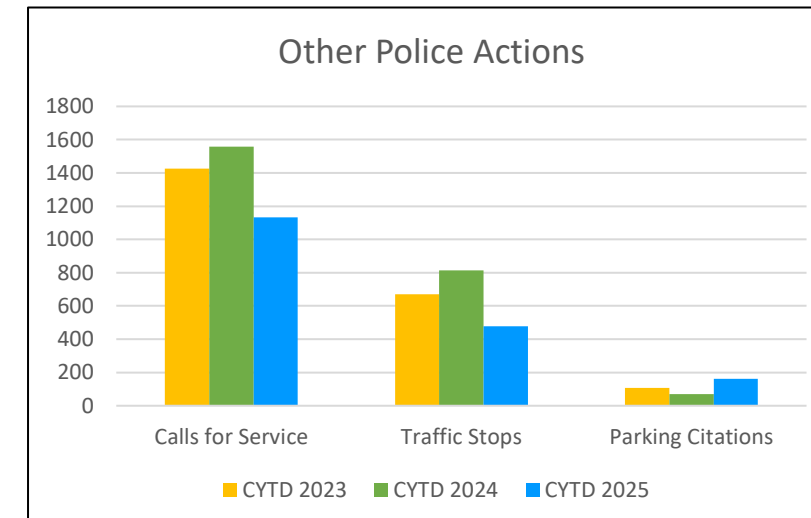
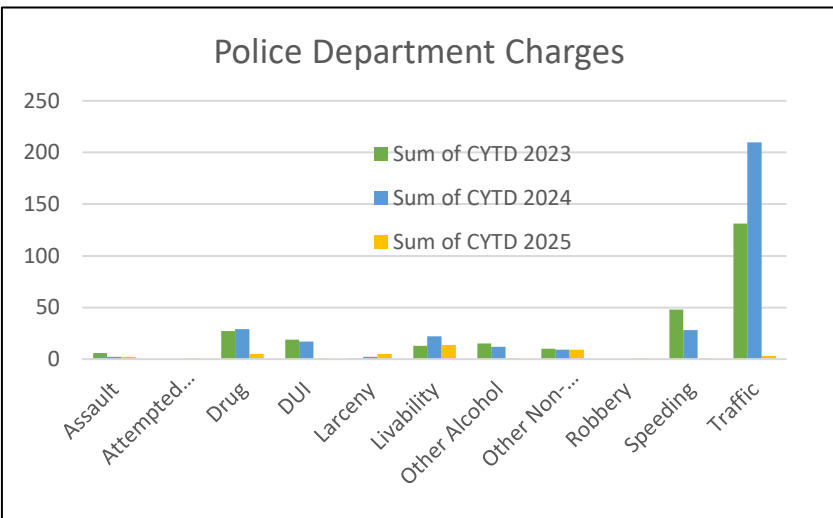


### Personnel Vacancies

Type	City Hall	Police	Fire	Pub Wks	Rec
Full-time		1 Police Officers	1 Paramedic/Fire Fighter 1 Fire Fighter		
Part-time					

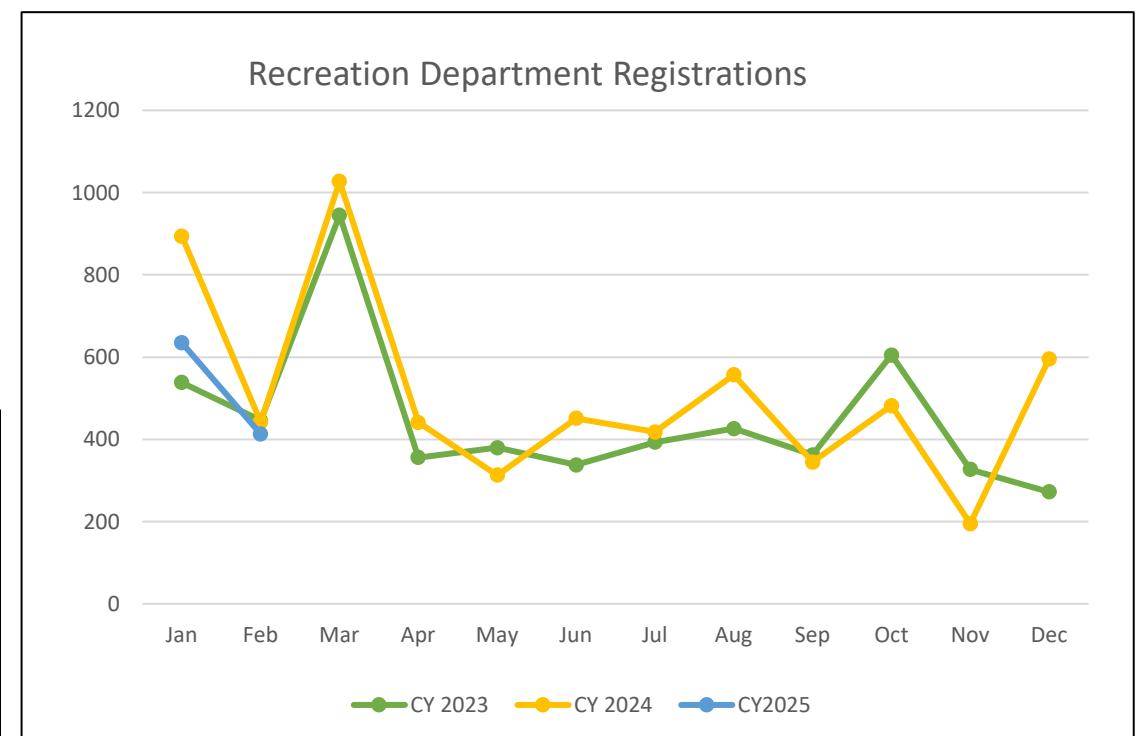
### Upcoming Community Events

<p><b>Speaker Series-Everything in it's place for Simply &amp; Organize!</b>  <b>Wednesday, March 12th 11:00am to 12:00pm at Recreation Center</b></p>
<p><b>Kids Jam</b>  <b>Friday, March 14th 9:00am to 2:00pm at Recreation Center</b></p>
<p><b>IOP Community Yard Sale</b>  <b>Saturday, March 22th 8:00am to 11:00am at Recreation Center</b></p>
<p><b>Speaker Series-Design on a Dime</b>  <b>Wednesday, March 26th 11:00am to 12:00pm at Recreation Center</b></p>
<p><b>Coffee with the Mayor</b>  <b>Friday, March 28th 9:00am to 10:00am at Café Paname</b></p>



### Building Department

	CY22 (12 mos)	CY23 (12 mos)	CY24 (12 mos)	CY25 (2 mos)
Construction Value	\$144 M	\$82.7M	\$125.9M	\$19.3M
New Homes Permitted	46	20	35	5
STR License by LY	2022 LY (12 mos)	2023 LY (12 mos)		2024 LY (10 mos)
	1,805	1,868		1,788



**City of Isle of Palms**

**Analysis of Dwelling Units and Short Term Rentals License Year 2024-2025**

Data from Charleston County Property Tax Records (updated November 2024) & IOP Short Term Rental License (STRL) Records as of 2/28/2025

Net increase of 20 Dwelling Units from 2023 to 2024 (see notes for details)

COUNTY DATA for 2024		
4%	6%	Total Dwelling Units

ADDS TO COUNTY DATA		
4%	6%	Total

Single Family	1,534	1,595	3,129 **	5	24	29 *
Townhouse	31	204	235			
Duplex/Triplex	20	32	52		52	52 ***
Condominium	66	931	997		14	14 ****
Commercial Condo	-	119	119			-
<b>Total Dwellings</b>	<b>1,651</b>	<b>2,881</b>	<b>4,532</b>	<b>5</b>	<b>90</b>	<b>95</b>

BREAKDOWN COUNTY TOTALS ACCORDING TO IOP SHORT TERM RENTAL LICENSE STATUS								
4% Primary Residence			6% Investment Property			All Residential Parcels		
4% with IOP STRL	4% Other	Total 4%	6% with IOP STRL	6% Other	Total 6%	Total Dwelling Units	Total STRLs	% with a STRL
112	1,427	1,539	762	857	1,619	3,158	874	28%
4	27	31	89	115	204	235	93	40%
8	12	20	30	54	84	104	38	37%
10	56	66	655	290	945	1,011	665	66%
-	-	-	118	1	119	119	118	99%
<b>134</b>	<b>1,522</b>	<b>1,656</b>	<b>1,654</b>	<b>1,317</b>	<b>2,971</b>	<b>4,627</b>	<b>1,788</b>	<b>39%</b>

Potential unlicensed rentals identified by Rentalscape

4% Pending licenses (applied within last 60 days but not paid)

6% Pending licenses (applied within last 60 days but not paid)

1,788

Distribution of 4% and 6% Dwellings Over Time						
	2010	2015	2020	2022	2023	2024
4% Primary Resident	33%	34%	37%	36%	36%	36%
6% Investment Prop	67%	66%	63%	64%	64%	64%

\* New Construction listed as Vacant Lots on County report. **16 New SFRs in 2024**

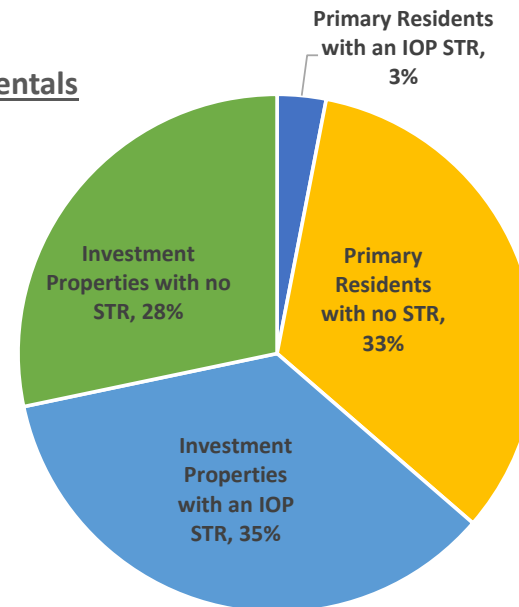
\*\*14 SFR's are tax exempted and were included as 6% in 2023 data, but moved to 4% on 2024 data because they are legal residents.

\*\*\* Duplexes & Triplexes have one Parcel ID in County data, but represent 2 or more dwelling units.

\*\*\*\* Certain condos have 2 separate units (lockout units) with separate STR licenses under a single Parcel ID.

**In 2024, 4 additional lockout units were identified**

**Licensed Rentals**







# ISLE OF PALMS POLICE DEPARTMENT

## MONTHLY REPORT

### FEBRUARY 2025



### SIGNIFICANT DEPARTMENTAL ACTIONS

Incidents of interest in February include 34 arrests, 230 traffic stops, 4 drug related charges, 84 traffic citations, and 2 arrests for driving under the influence.

The Isle of Palms Police Department has one officer participating in the FBI Joint Terrorism Task Force.

ACTIVITY SUMMARY	FEB	YTD	FEB	YTD
	2025	2025	2024	2024
Calls for Service	609	1133	717	1558
Incident Reports	91	153	82	178
Traffic Collisions	8	8	4	8
Traffic Stops	230	479	381	813
Bicycle Stops	0	0	0	1
Golf Cart Stops	0	0	1	1
Marine Calls for Service	0	0	0	0
Arrests	34	55	50	94
State Law Violations	98	164	145	293
City Ordinance Violations	2	4	6	24
Warning Citations	177	379	274	560
Parking Citations-PCI Municipal Services	86	161	18	69
Isle of Palms Warrants Served	9	11	8	14
Criminal Investigations-Cases Opened	14	24	6	13
Criminal Investigations-Cases Closed	12	20	1	4
Training Hours	122	247	167	236
Coyote Sightings	6	11	3	5
Beach Wheel Chairs Issued	1	2	0	0
REPORTS BY OFFENSE TYPES	FEBRUARY	YTD		
	2025	2025		
DUI	2	7		
Other Alcohol Offense	5	7		
Arson/Suspicious Fire	0	0		
Rape/Sexual Assault	0	0		
Assault	0	3		
Indecent Exposure	0	0		
Harassment	0	0		
Drug Incident	7	13		
Homicide/Manslaughter	0	0		
Traffic	21	35		
DUS	12	21		
Robbery	0	0		
Burglary	0	0		
Theft from Motor Vehicle	2	3		
Motor Vehicle Theft	0	0		
Larceny	6	6		
Fraud	4	6		
Suicide (Actual or Attempted)	0	0		
Vandalism	1	3		
Weapon Law Violations	0	1		
Assist Other Agency	2	3		
Noise Violation	12	17		
All Other Offenses	17	35		
<b>TOTAL</b>	<b>91</b>	<b>160</b>		

BEACH RELATED CHARGES	FEB	YTD	FEB	YTD
	2025	2025	2024	2024
Alcohol on Beach	0	0	0	0
Smoking on Beach	0	0	0	0
Litter on Beach	0	0	0	0
Glass on Beach	0	0	0	0
Plastics on Beach	0	0	0	0
Vehicles on Beach	0	0	0	0
Nudity on Beach	0	0	0	0
Beached Boat on Beach	0	0	0	0
Destruction of Sea Oats	0	0	0	0
Dog Off Leash	0	1	0	0
<b>TOTAL</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>
CHARGES	FEB	YTD	FEB	YTD
	2025	2025	2024	2024
Attempted Murder	0	0	0	0
Robbery	0	0	0	0
Assault	0	0	0	0
Domestic Violence	0	3	2	2
Public Disorderly	2	2	1	1
Burglary	0	0	0	0
Possession of Stolen Vehicle	0	0	0	0
Grand Larceny	1	1	0	0
All Other Larceny	0	0	0	0
Fraud	1	1	1	2
Gun Violation	0	1	1	3
Drug Violations/Sale/Manufacture/ Distribution/Etc.	0	0	0	3
Possession of Controlled Substance	0	0	0	0
Other Drug Possession Methamphetamine/ Cocaine/Cocaine Base/Ecstasy/MDMA/Etc.	1	1	1	1
Simple Possession of Marijuana/Possession 1 oz. or less	2	4	11	16
Drug Equipment Violation	1	2	8	9
Vandalism/Damage to Property	0	0	0	0
Driving Under Suspension	14	24	11	27
Driving Under Influence	2	7	12	17
Other Alcohol Violation	6	7	7	12
Speeding	15	29	13	28
Other Traffic Related	55	84	81	182
Golf Cart Violation	0	0	1	1
Marine Violation	0	0	0	0
Resisting/Hindering/Assaulting Public Official or Police Officer	0	0	0	0
False Information to Police/Fire/Rescue	0	0	0	0
Failure to Stop for Police/Evade/Elude	1	1	2	2
Animal Violation (Other than Dog at Large)	0	1	4	5
Noise Violation	1	1	0	0
Littering	0	0	1	1
Indecent Exposure	0	0	0	0
Business License	1	1	1	16
All Other Charges	6	8	1	3
<b>TOTAL</b>	<b>109</b>	<b>178</b>	<b>159</b>	<b>331</b>



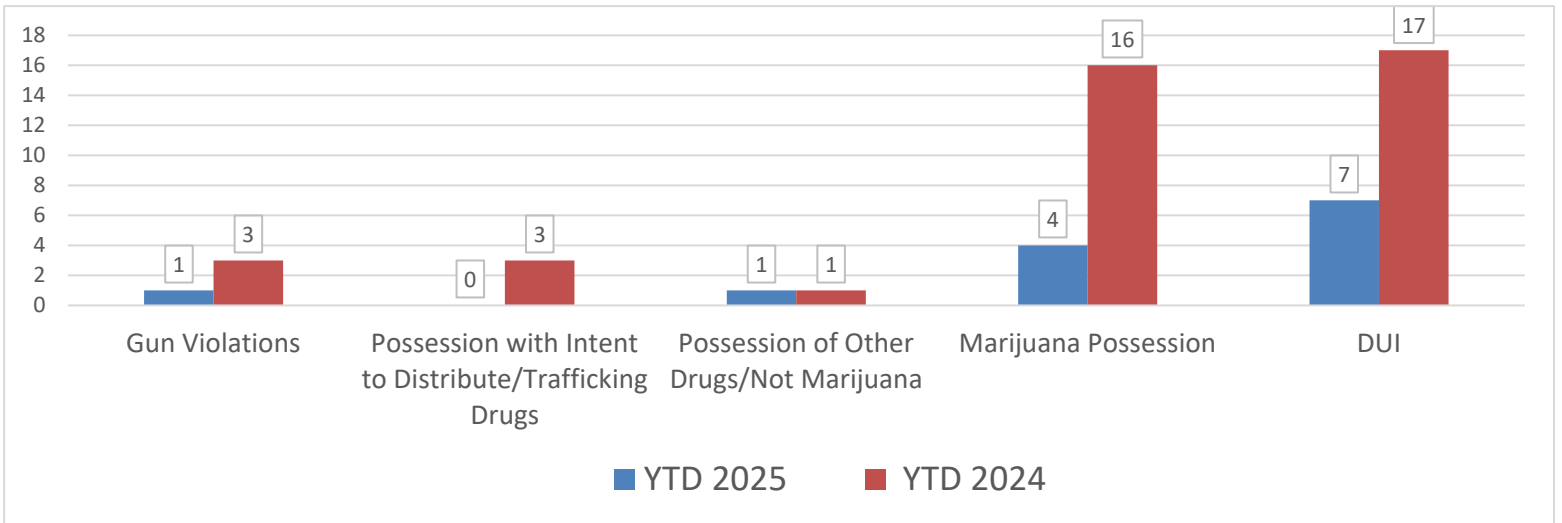
# ISLE OF PALMS POLICE DEPARTMENT

## MONTHLY REPORT

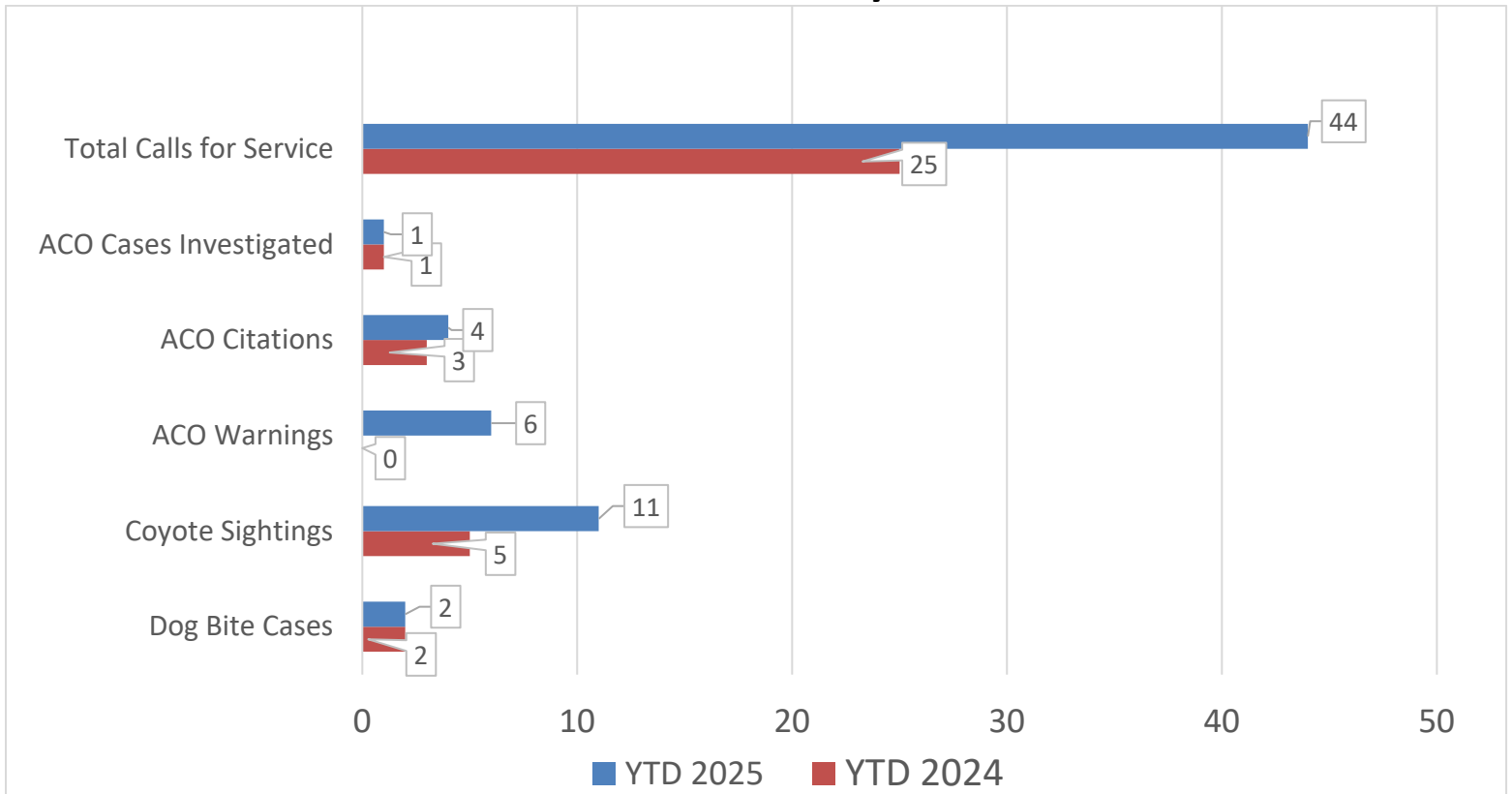
### FEBRUARY 2025



### Drug, Gun, and DUI Charge Trend – Year to Date



### Animal Control Activity - Year to Date





# ISLE OF PALMS POLICE DEPARTMENT

## MONTHLY REPORT

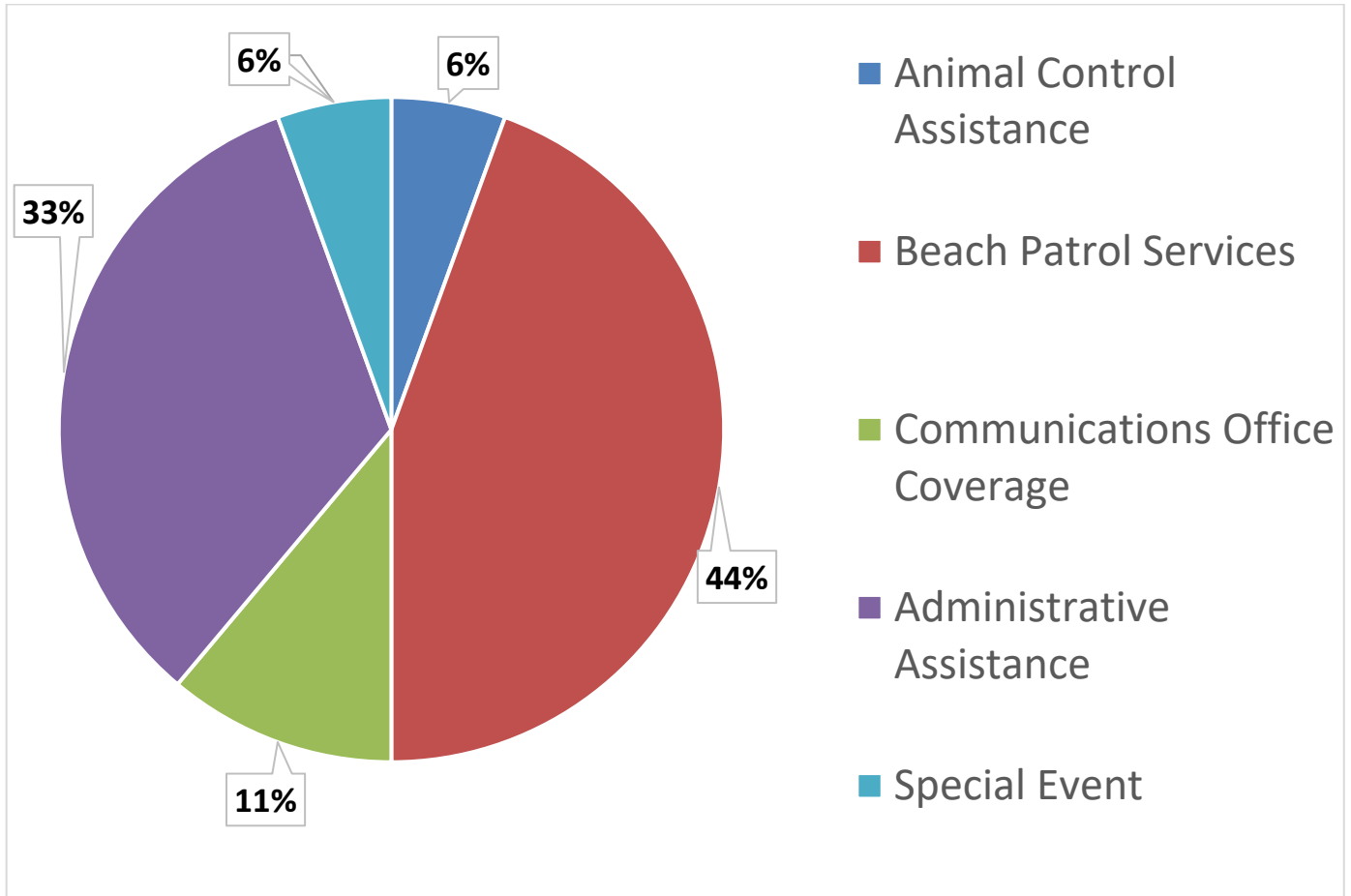
### FEBRUARY 2025



### Beach Service Officer Activity – FEBRUARY 2025

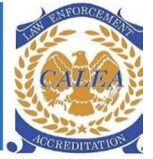
Charges	Written Warnings Issued	Citations Issued	Total
Alcohol on the Beach	0	0	0
Smoking on Beach	0	0	0
Litter on Beach	0	0	0
Glass on Beach	0	0	0
Plastics on Beach	0	0	0
Destruction of Sea Oats	0	0	0
Dog Off Leash	0	0	0
Other	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	

### Beach Service Officer Activity – FEBRUARY 2025





# ISLE OF PALMS POLICE DEPARTMENT MONTHLY REPORT FEBRUARY 2025

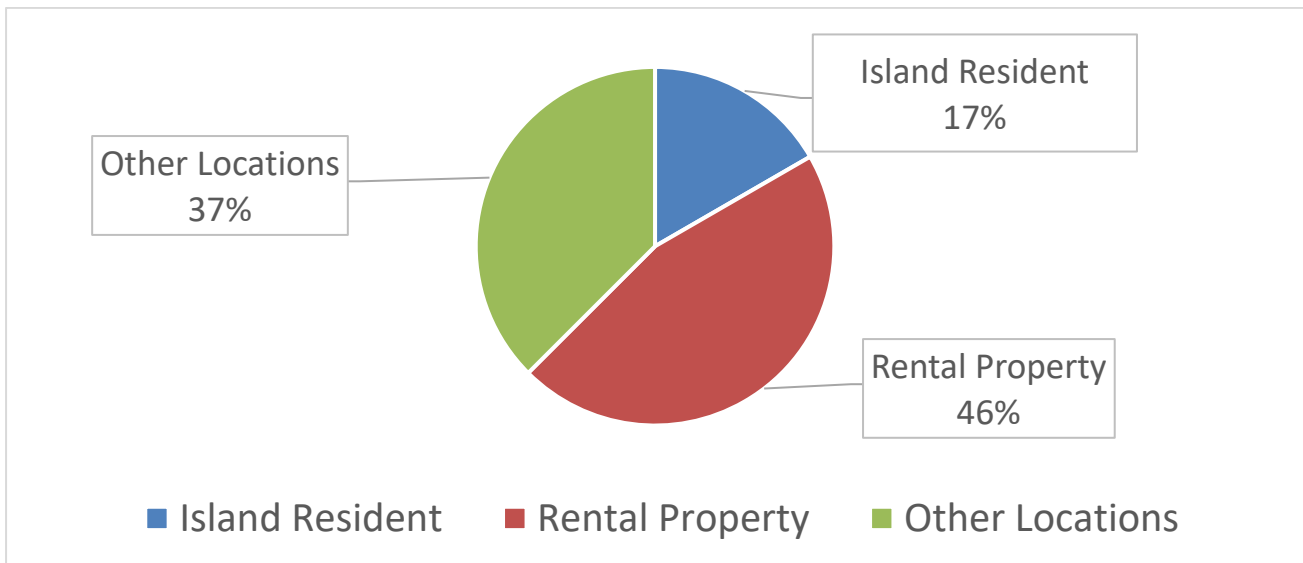


## Livability Statistics – FEBRUARY 2025

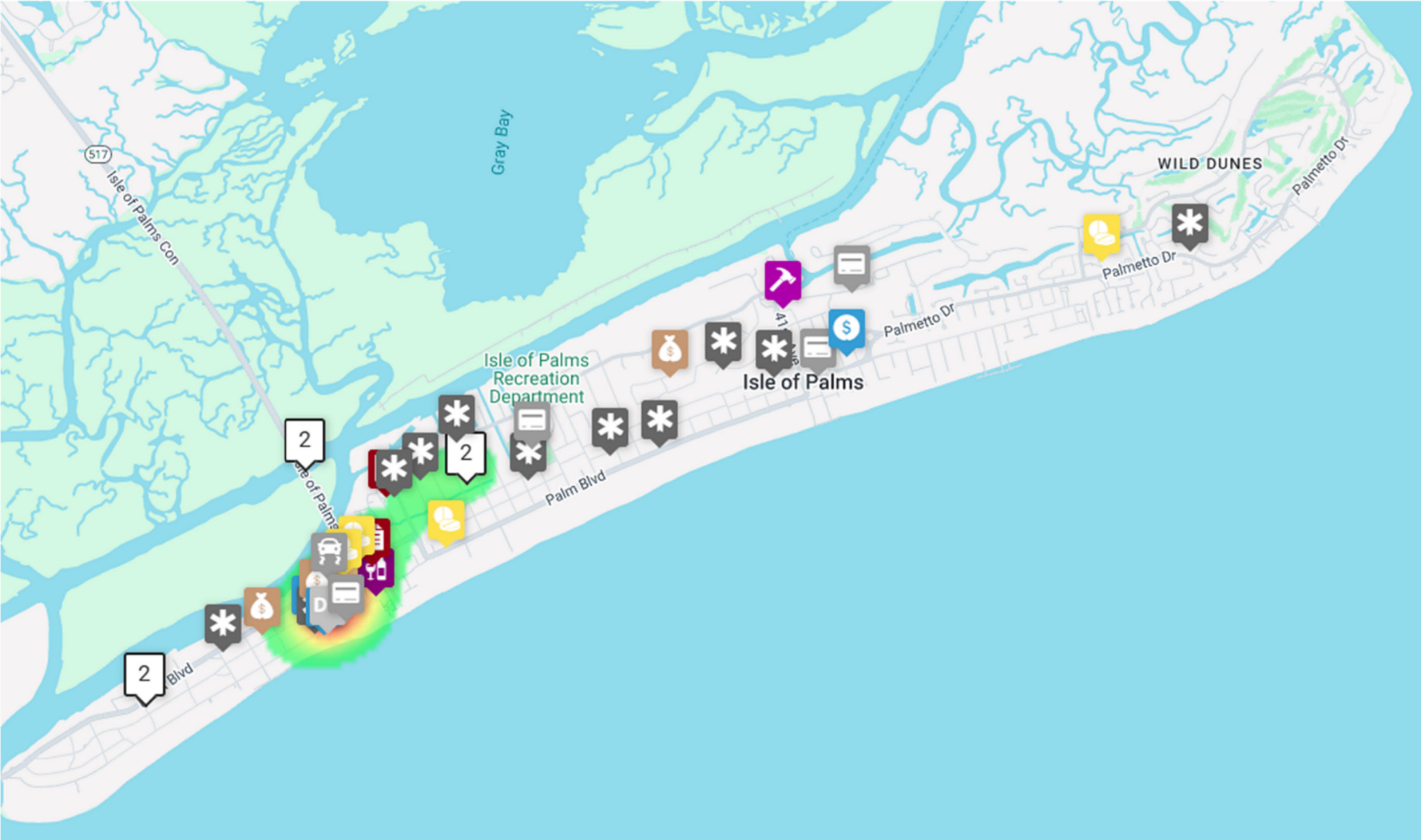
LIVABILITY COMPLAINTS	ISLAND RESIDENT	RENTAL PROPERTY	OTHER LOCATIONS	TOTAL COMPLAINTS
NOISE	4	8	0	12
FIREWORKS	0	0	1	1
UNKEMPT LOTS	0	0	0	0
RIGHT-OF-WAY OBSTRUCTION	0	1	7	8
BUSINESS LICENSE	0	1	1	2
OTHER RENTAL PROPERTY VIOLATIONS NOT LISTED	0	0	0	0
SHORT TERM RENTAL OCCUPANCY VIOLATIONS	0	0	0	0
SHORT TERM RENTAL VEHICLE LIMIT VIOLATIONS	0	0	0	0
ROLL CART VIOLATIONS	0	1	0	1
<b>TOTAL</b>	<b>4</b>	<b>11</b>	<b>9</b>	<b>24</b>
<b>% BY CATEGORY</b>	<b>17%</b>	<b>46%</b>	<b>38%</b>	

CITATIONS	WARNINGS	UNFOUNDED	COMPLAINT DISPOSITION
1	9	2	12
0	0	1	1
0	0	0	0
0	8	0	8
1	0	1	2
0	0	0	0
0	0	0	0
0	0	0	0
0	1	0	1
<b>2</b>	<b>18</b>	<b>4</b>	<b>24</b>
<b>8%</b>	<b>75%</b>	<b>17%</b>	

## Livability Complaint by Property Type – FEBRUARY 2025

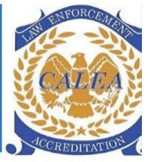


# INCIDENT REPORT DENSITY/HEAT MAP FEBRUARY 2025

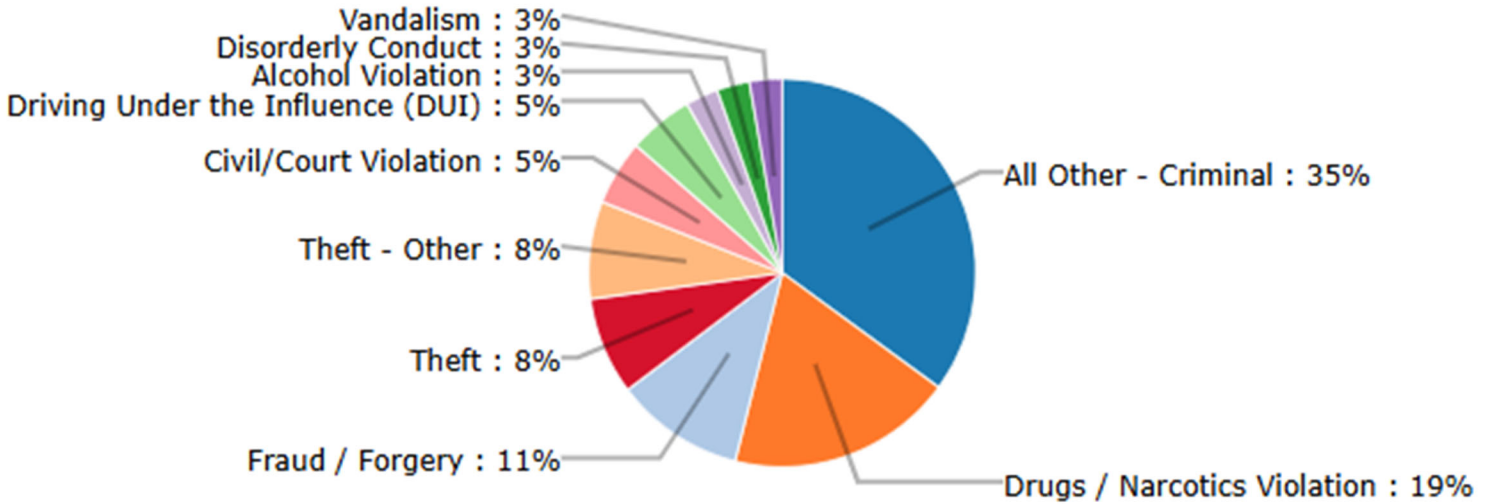




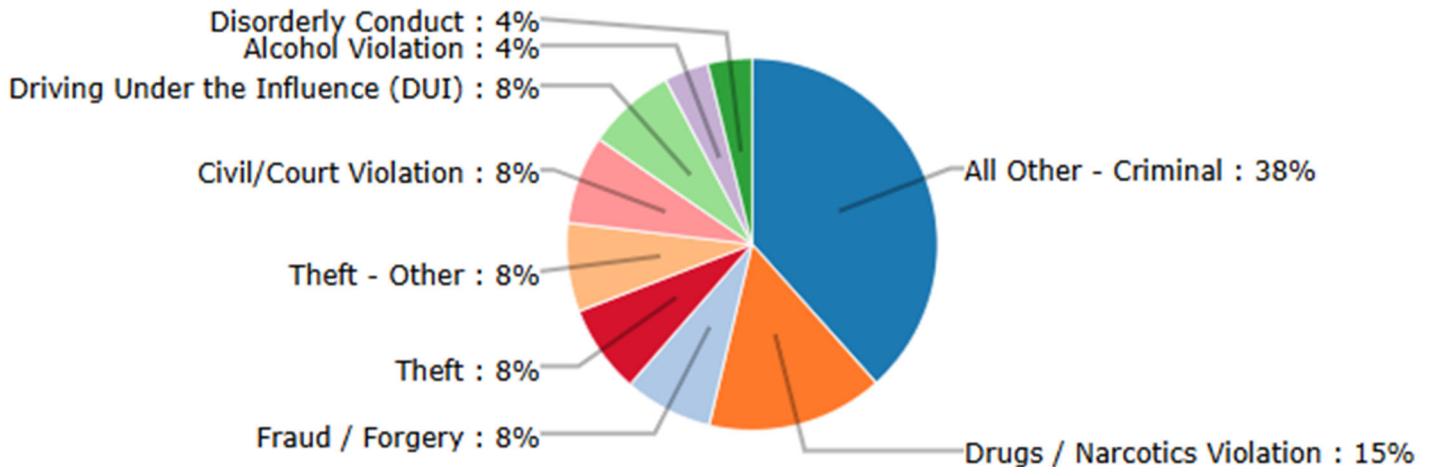
# ISLE OF PALMS POLICE DEPARTMENT MONTHLY REPORT FEBRUARY 2025



## Reported Incident Crime Class Types – FEBRUARY 2025



## Reported Incident Crime Class Types (Red Area) – FEBRUARY 2025



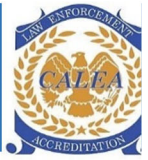
“All Other” includes incidents related to animals, noise, livability, and other violations.



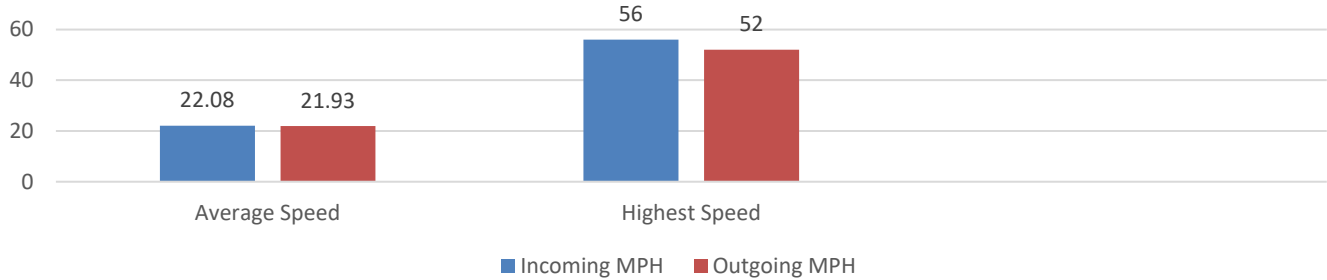
# ISLE OF PALMS POLICE DEPARTMENT

## MONTHLY REPORT

### FEBRUARY 2025



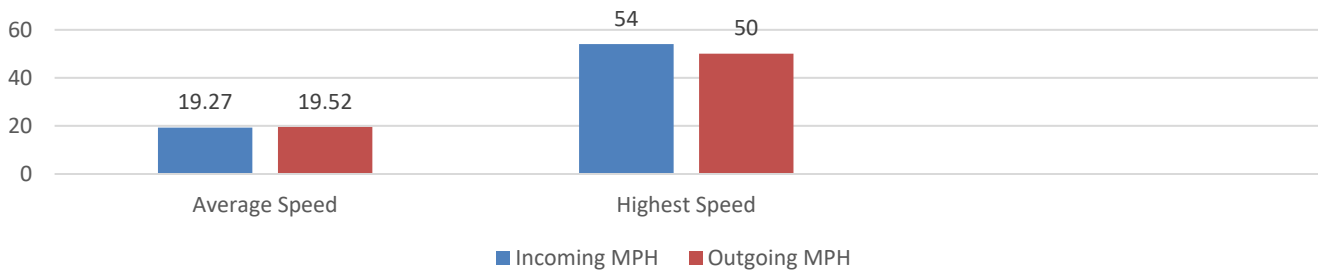
#### 41st Ave Radar Stats (Wildwood side) FEBRUARY 2025



Total Incoming Vehicles: 14073  
Total Outgoing Vehicles: 14320

Busiest Day of the Month: February 22, 2025  
Total Vehicles Incoming: 874  
Total Vehicles Outgoing: 834

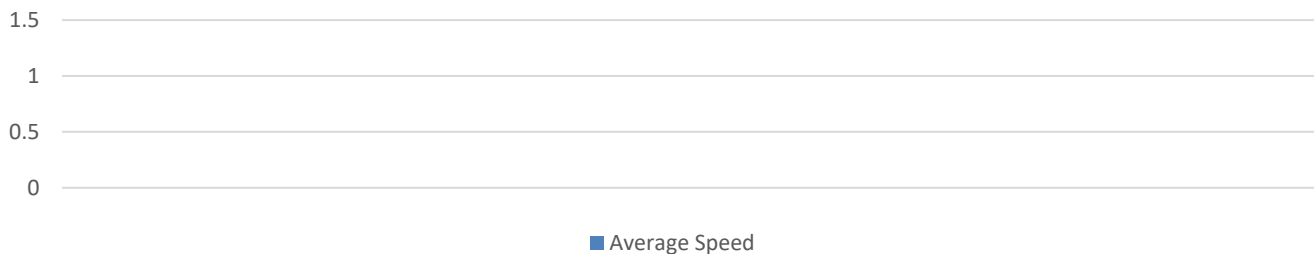
#### 41st Ave Radar Stats (Marginal side) FEBRUARY 2025



Total Incoming Vehicles: 13310  
Total Outgoing Vehicles: 11791

Busiest Day of the Month: February 22, 2025  
Total Vehicles Incoming: 608  
Total Vehicles Outgoing: 545

#### Mobile Radar Trailer FEBRUARY 2025



\*No Mobile Radar Trailer Data this period.





# PCI MUNICIPAL SERVICES FEBRUARY 2025

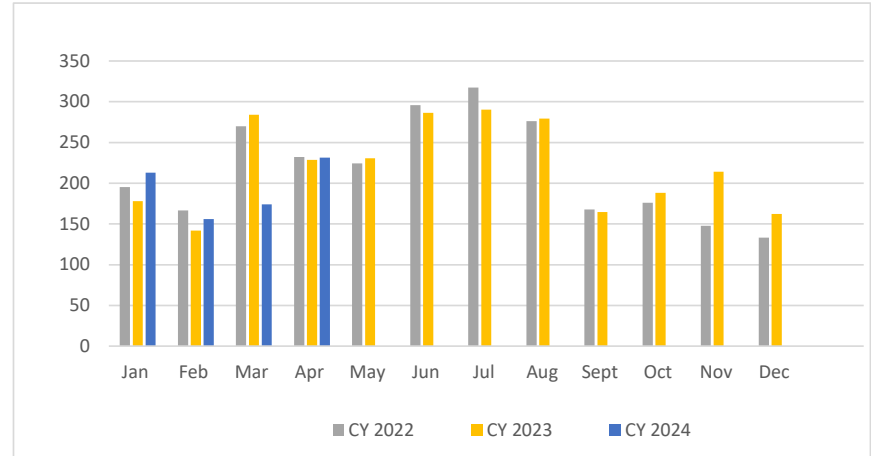
Description	Valid Count	Cancel Count	Paid Count	Total Citations	Total Warning Citations
PARKED WITHIN 30FT OF STOP SIGN	1	0	0	1	0
RESIDENTIAL PERMIT REQUIRED	4	0	1	5	0
NO PARKING ZONE	0	1	0	1	0
PARKED ON SIDEWALK	0	0	0	0	0
PARALLEL PARKING ONLY	0	1	0	1	0
PARKED ON PAVEMENT	2	2	2	6	3
PARKED WITHIN 4FT OF PAVEMENT	12	2	18	32	1
PARKED AGAINST THE FLOW OF TRAFFIC	17	2	19	38	7
IMPROPER PARKING	0	0	1	1	0
BLOCKING/ OBSTRUCTING TRAFFIC	1	0	0	1	0
<b>Total</b>	<b>37</b>	<b>8</b>	<b>41</b>	<b>86</b>	<b>11</b>





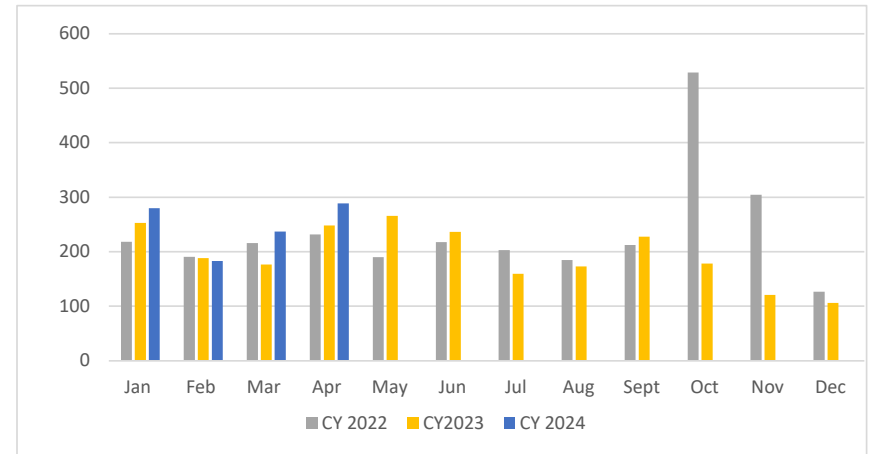
**City of Isle of Palms, SC**  
**Public Works Department - February 2025 Report**  
**Household Garbage (Tons)**

Month	2021	2022	2023	2024	2025
Jan	177.84	195.16	177.78	213.1	188.39
Feb	146.48	166.74	141.99	155.8	122.54
Mar	204.6	269.88	283.84	174.12	
Apr	249.86	232.29	228.59	231.41	
May	238.23	224.49	230.63	270.85	
Jun	309.71	295.83	286.52	285.71	
Jul	334.17	317.47	290.33	369.56	
Aug	285.21	275.99	279.2	251.11	
Sept	247.76	167.91	164.66	207.05	
Oct	184.63	175.99	188.33	188.84	
Nov	315.31	147.67	213.92	130.67	
Dec	286.85	133.1	162.31	177.15	



**Yard Debris (Tons)**

Month	Column2	2022	2023	2024	2025
Jan	183.07	218.4	252.78	279.78	126.21
Feb	156.06	190.63	188.5	182.95	212.03
Mar	282.37	215.58	176.46	236.88	
Apr	256.07	231.64	248.37	288.91	
May	208.32	190.02	265.62	229.39	
Jun	266.23	217.88	236.52	186.2	
Jul	273.08	202.64	159.51	256.16	
Aug	223.64	184.78	172.83	250.74	
Sept	182.96	212.11	227.8	176.09	
Oct	152.16	528.77	178.51	317.18	
Nov	124.04	304.19	120.6	166.13	
Dec	125.14	126.89	106.2	141.64	



**Miscellaneous Garbage Collection (tons)**

Month	2022	2023	2024	2025
Jan				35.07
Feb				32.09
Mar				

Apr				
May				
Jun				
Jul				
Aug				
Sept				
Oct				
Nov				
Dec				

### Stormwater Management

Location	Description	Linear Feet Cleared
30th Lauden to Skinner	Ditch restructuring	270 LF
29th and Palm Blvd	Restructure swale to pipe	15 LF
Charleston Blvd.	Jet vac pipe/boxes cleaning	705 LF
Charleston Blvd.	Found burried inlet and repaired	2x2 inlet box
Charleston and 3rd Ave.	2 inlet boxes and pipes	90 LF
Merritt Blvd.	Outfall restructuring	30LF
Merritt Blvd. and Palm	Jet vac Inlet boxes to outfall	570 LF

### Beach Access Paths Maintenance & Improvements

Location	Description
26 beach access	Heavy beach access cleaning
Sea Cabins beach access	Estimates for repair of loose IPE boardwalk
City wide beach access cleaning	Continuing Pleasant places/IOP weekly beach path cleaning

26A and 36A	Boardwalk installation complete
9th and 41st ADA paths	Machine cleaning sand and debris
26A Ave beach access	Drainage meeting with homeowner at 2609

### Building & Facilities Maintenance

Location	Description
Front Beach	Estmates for Sea cabins boardwalk reapiir
Front beach/beach accesses	14 Ave emergency access construction in progress
City Hall	Pressure washing
Public Works	Removal of debris and brush conector side
City Hall	Railing relacement qoutes
Front Beach public restrooms	Pressure washing of Boarwalk, restrooms and sidewalks
Garbage compactor	Cleaning weekly/powerwashing
Municipal lot A	Parking lot clean up Public services/Pleasant Places
Municipal Lot B	Parking lot clean up Public services/Pleasant Places
Marina	UST tank repair Marina/ PSB and compliance testing
Front beach	Trash clean up- cigarette urns Public services
Front Beach	Pavillion to 14th landscape installation
Public dock	No mooring sign installation



# Isle of Palms Recreation Department

## Monthly Report

### February 2025

#### Programs, Group Fitness, Athletics & Special Events

- Adult Classes: Fitness Classes with top participation: Core & More (17), Line Dancing (18), Morning Yoga (10), Move-It (18), Strength (18), Strength & Stability (15), Over 60 Training (17), Over 60 Yoga (14), Barre (12) and Yin Yoga (12)
- Youth Classes: Youth Art classes (42), Youth Theater (9), and Tae Kwon Do (10).
- Speaker Series: Tuesday, February 4 at 5pm Lisa Gastaldi, Lowcountry College Counseling on the College Admissions process (9) attended.
- Keenagers: Wednesday, February 5 at Noon. 40 seniors attended the social hour and luncheon. Participants played Bingo for entertainment.
- IOP Community Wellness Fair: Friday, February 21 from 7am - 11am. East Copper provided cholesterol and glucose screenings to the public, 25 community members registered for bloodwork. 25 employees participated in the bloodwork through insurance and Fitness Forum Occupational Health. Over 30 vendors were onsite providing screenings and health checks for the community and employees.
- Adult Athletics Meetings were held on Monday, February 24. 3 on 3 Basketball: 6 teams (36 participants) registered, 6v6 Soccer: 4 teams (48 participants) registered and Table Tennis \*8) players. Leagues are scheduled to start March.
- Youth Baseball coach meetings and skill evaluation were held Tuesday, February 25. Approximately 110 are registered in ages 3-12 for the youth baseball league. Practices are scheduled to start in March and games are scheduled for April.
- Art & Cars in the Park: Saturday, April 12 10am - 2pm: the event will include: 18 local artists; 7 food trucks; 4 food vendors; 34 specialty vendors; car show; live music; bilingual book walk ribbon cutting; and a Tree Hugs educational stroll and learn featuring IOP City arborists.

#### Upcoming Programs, Events & New Offerings

- Keenagers: Wednesday, March 5 at Noon. Social Hour starts at 11:30am, covered dish lunch starts at Noon.
- Saturday, March 1: Front Beach Fest from 12pm - 4pm, Front Beach Isle of Palms: Family Street Festival, Over 170 vendors applied with 55 spaces to be filled. Shem Creek Boogie Band and Vinyl Daze will be performing during the festival.
- Speaker Series: March 12 and March 26 at 11am join Heidi Alexander and Elizabeth Newman for the Design Series
- Friday, March 14: Kids Jam 9am - 2pm.
- Summer Camp Registration: March 18 for IOP Residents Only
- Saturday, March 22: Community Yard Sale from 8am - 11am. Yard Sale vendors full.
- Speaker Series: March 27 at 10am Charles Donnely of Holy City Birding
- March 28 & 29: Tae Kwon Do Tournament and Seminar for Advanced Belts

#### Operations

- The Flooring Connection: High Tide/ Low Tide flooring relayed the floor on Feb 14 - 18, waiting on cove base to finish the project.
- Game Time Playground: Playground Equipment ordered, scheduled to begin March 10.
- Exterior Building Painting: Bid was awarded to Drexel Hill Painting, work is tentatively scheduled middle/end of March.
- Budget: working on budget for 2025-2026 fiscal year and receiving quotes from vendors.
- Josh Key attended Park Maintenance Institute.

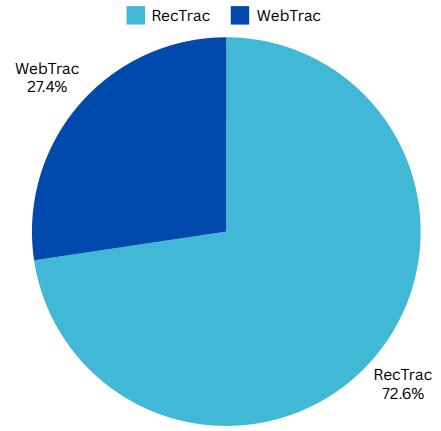
#### Maintenance & Repairs

- Prepped Baseball and Softball fields for youth baseball season. Repaired base plugs and and base post.
- Painted baseball field dugouts.
- Moved soccer goals to soccer field for 6v6 Soccer season.
- Playground: Lily pad on the big toy was repaired, swing hardware has been ordered and repaired in upcoming weeks.
- Removed 2 picnic tables from grounds due to rust.
- Painted High Tide room wall, hallway at the water fountain and end hallway at exit doors.
- Charleston Fitness Equipment: ordered and replaced two cardio equipment machines
- AVIV onsite for ice machine maintenance.

# Enrollment Report February

Participants registering for classes during the month from February 1 - February 26: RecTrac: in-house registration vs. WebTrac: online Registrations.

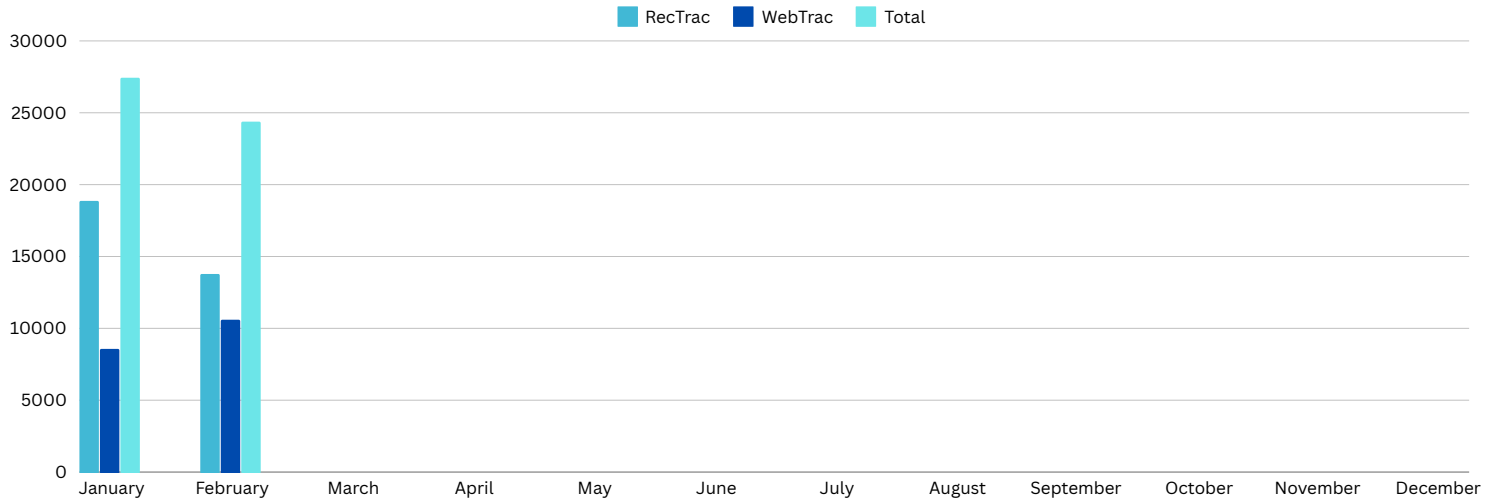
**Total registrations for February 2025 = 413**



# Monthly Revenues 2025

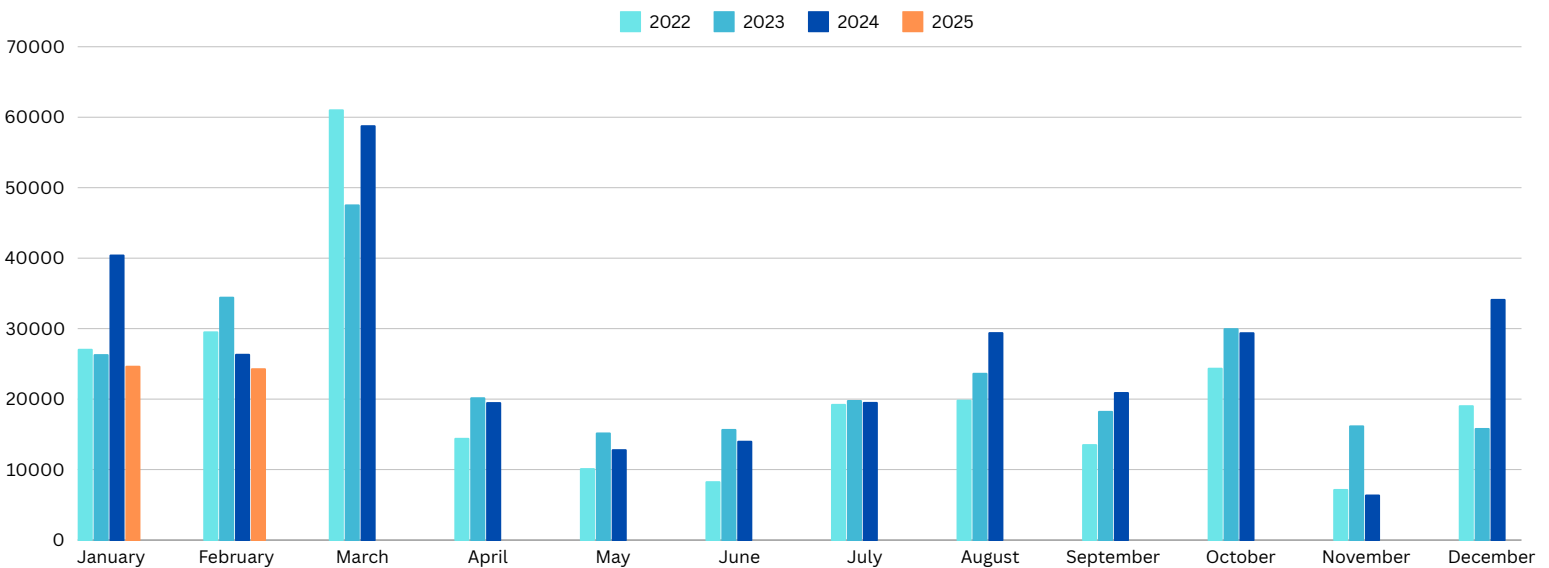
Revenue sales brought in by programs, athletics and events. RecTrac: in-house vs WebTrac: online

**Total Revenue for February 2025 = \$24,383**



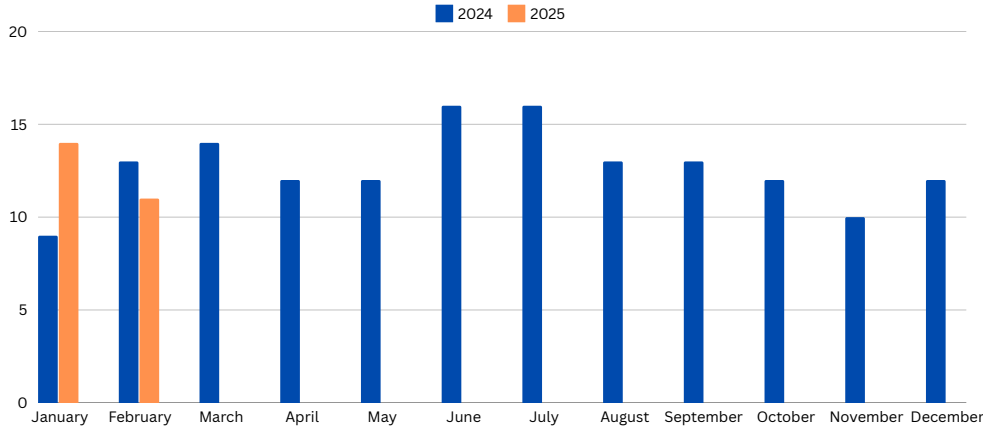
# Annual Comparison

Year to Year



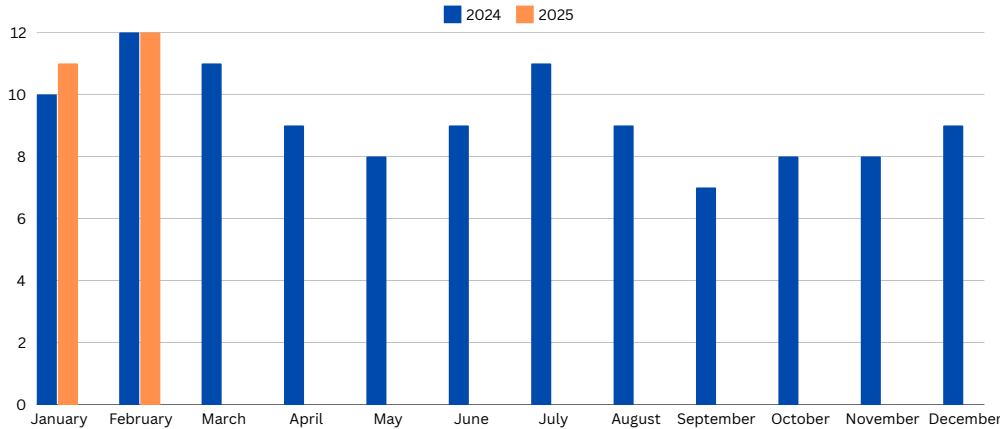
# Open Gym Daily Average Visits

Participants utilizing the gymnasium for open play



# Cardio Room Daily Average Visits

Participants utilizing the cardio room



## Upcoming Events



Summer Camp Registration opens March 18 for Isle of Palms Residents.



IOP Community Yard Sale: Saturday, March 22. Shop used & like new products along Hartnett Blvd from 27th - 29th Ave.



### Art & Cars in the Park

Saturday, April 12, 10AM-2PM

Hot Rods, Muscle, Antiques, Collectibles, & Special Interest Cars  
 Ribbon Cutting NEW Bilingual Book Walk 10:30AM  
 Tree Hugs Educational Stroll & Learn 11AM  
 Juried art show featuring local artists  
 IOP Rec Youth Art & Pottery Exhibit  
 Live Music  
 Food Truck Jam  
 Specialty Vendors



IOP REC Center 24 28th Avenue Isle of Palms

Art & Cars in the Park: New Event, Saturday, April 12 from 10am - 2pm. Enjoy local Art, Hot Rods and collectible cars and more.

## Social Media Report

### At a Glance



Facebook

2.9K

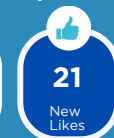
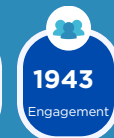


Instagram

3.2K

### Page Overview

last 28 days



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# MONTHLY REPORT

# 2025



## FEBRUARY

ISLE OF PALMS FIRE & RESCUE

Authored by: Craig K. Oliverius, Fire Chief



# OPERATIONS

## Incident by Type

Incident Type Category	2025			2025	
	Jan	Feb	Mar	Grand Total - Current	% of Total Incidents - Current
1 - Fire	3	3	0	6	3.00%
3 - Rescue & Emergency Medical Service Incident	25	31	1	57	27.00%
4 - Hazardous Condition (No Fire)	3	1	0	4	2.00%
5 - Service Call	9	14	1	24	11.00%
6 - Good Intent Call	52	44	2	98	46.00%
7 - False Alarm & False Call	13	9	0	22	10.00%
<b>Grand Total</b>	<b>105</b>	<b>102</b>	<b>4</b>	<b>211</b>	<b>100.00%</b>

## Residency Status

**TOTAL INCIDENTS FOR THE MONTH: 102**

**Resident Calls: 33**

**Non-Resident Calls: 57**

**Unknown: 12**

## Emergency Medical Incidents

### Isle of Palms Fire & Rescue

**Number of Emergency Medical Incidents: 22**

**Number of Resident Emergency Medical Incidents: 12**

**Number of Non-Resident Emergency Medical Incidents: 7**

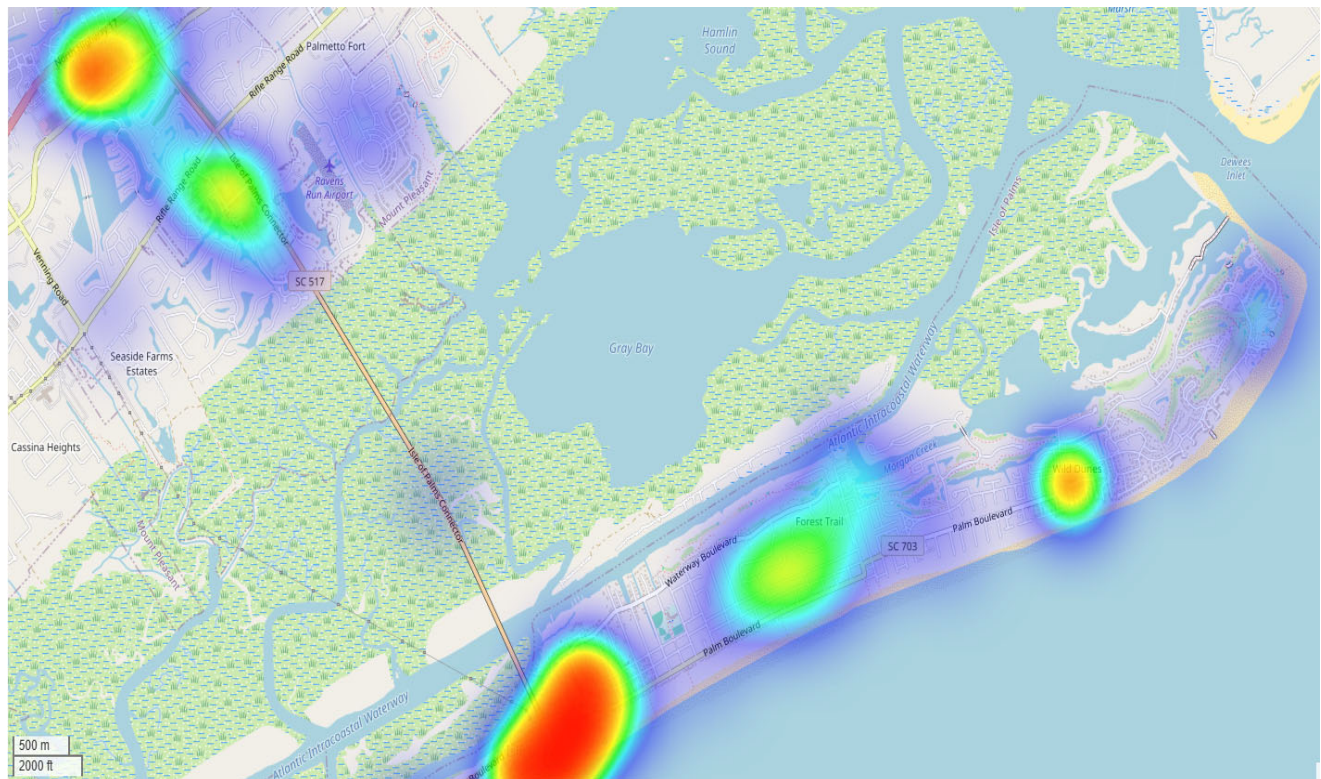
**Number of unknown residency Emergency Medical Incidents: 3**



# Average Unit Performance

Shift	Count	Turnout	Travel Time	Total Response Time	Time at Scene	Dispatch to Clear
<b>Unit: B1020</b>						
B	1					5:45
<b>Unit: BC1006</b>						
A	12	2:40	6:41	6:32	44:06	28:54
B	10	2:17	9:43	7:25	41:47	28:41
C	17	1:33	3:13	6:07	9:02	11:20
<b>Unit: E1002</b>						
A	13	1:49	4:54	6:19	19:18	20:19
B	8	1:08	4:42	5:57	14:41	18:16
C	8	1:33	5:13	6:37	11:42	15:01
<b>Unit: J51001</b>						
B	1					5:45
C	1	0:00		8:47		21:17
<b>Unit: J51002</b>						
C	1	0:00		8:47		21:12
<b>Unit: L1001</b>						
A	1	1:21		5:38		6:28
B	1	0:14	9:15	12:54	22:25	31:54
<b>Unit: ML1001</b>						
A	1	2:53	4:39	7:10	22:33	30:05
C	1	0:00		8:47		21:17
<b>Unit: ML1002</b>						
C	1	0:00		8:47		21:06
<b>Unit: ML1003</b>						
A	1	0:00	0:00	7:10	22:29	22:29
C	1	0:00		8:47		22:54
<b>Unit: SG1001</b>						
A	11	1:37	4:40	6:04	17:28	20:43
B	8	1:36	3:24	7:04	14:02	15:43
C	13	1:34	3:44	6:45	15:05	18:14
<b>Unit: TW1002</b>						
	1	1:26		6:04		8:37
A	24	1:30	5:17	6:11	39:03	18:49
B	10	1:02	6:51	6:34	19:29	14:35
C	24	1:28	3:46	5:47	8:24	8:48

# Heat Map



## Incidents by Shift and District

### Response Mode

Basic Incident Zone Number (FD1.32)		1001	1002	OOJ	
Basic Shift Or Platoon (FD1.30)	Basic Incident City Name (FD1.16)				Count of Fire Incidents Grand Total
A	Isle of Palms	11	9		20
	Mount Pleasant			19	19
	Sullivans Island			2	2
B	Berkeley			1	1
	Isle of Palms	10	7		17
	Mount Pleasant			5	5
C	Isle of Palms	17	5		22
	Mount Pleasant			16	16
<b>Grand Total</b>		<b>38</b>	<b>21</b>	<b>43</b>	<b>102</b>

Basic Incident Month Name	February	
Basic Response Mode To Scene (FD1.70) ▲	Count of Fire Incidents Grand Total	
Emergency	57	57
Non-Emergency	45	45
Not Reported	2	2
<b>Grand Total</b>	<b>104</b>	<b>104</b>

## Auto/Mutual Aid

Basic Aid Given Or Received (FD1.22)	Automatic aid given	Automatic aid received	Mutual aid given	None	Not Reported
Basic Incident Type Subcategory (FD1.21)					
11 - Structure Fire	1		2		
31 - Medical assist				6	
32 - Emergency medical service (EMS) Incident				20	
33 - Lock-In				1	
34 - Search for lost person		1		1	
35 - Extrication, rescue				2	
41 - Combustible/flammable spills & leaks		1			
55 - Public service assistance		1		13	
61 - Dispatched and cancelled en route	37			3	
62 - Wrong location, no emergency found	1	1		1	
65 - Steam, other gas mistaken for smoke	1				
73 - System or detector malfunction		1			
74 - Unintentional system/detector operation (no fire)		2		6	
Not Reported					2
<b>Grand Total</b>	<b>40</b>	<b>7</b>	<b>2</b>	<b>53</b>	<b>2</b>

# TRAINING DIVISION

## Monthly Training Schedule



### March 2025 Training Schedule

#### Fire Training

Date	Time	Topic	Proctor	Location
03/07/25 (B)	0845	LIVE FIRE	DC Harshaw	MPFD Training Facility
03/18/25 (A)	0900 - 1100	Auto-aid	DC Harshaw	St. 1 Bay
03/25/25 (B)	0900 - 1100	Auto-aid	DC Harshaw	St. 1 Bay
03/27/25 (C)	0900 -1100	Auto-aid	DC Harshaw	St. 1 Bay

#### Medical Training

Date	Time	Topic	Instructor	Location
03/10/25	1000 - 1200	Airway Management	Eng. Ivan	St. 2 Training Room
03/12/25	1000 - 1200	Airway Management	Eng. Ivan	St. 2 Training Room
03/13/25	1000 - 1200	Airway Management	Eng. Ivan	St. 2 Training Room

#### Physical Fitness Training

Date	Time	Topic	Proctor	Location
N/A	N/A	<u>FireSled</u>	Captain's Choice	St. 1 Bay
N/A	N/A	<u>FireSled</u>	Captain's Choice	St.1 Bay
N/A	N/A	<u>FireSled</u>	Captain's Choice	St. 1 Bay

#### Specialty Training

Date	Time	Topic	Instructor	Location
03/11/25	0800-1600	Swiftwater/Flood Rescue	NA	Lieben Facility

#### Training Announcements

- SCEMSA Symposium – 03/05/25 – 03/07/25
  - Hose Testing – 03/05/25
  - TIC Demo – 03/24/25

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# FIRE MARSHAL

## Fire Marshal's Report

### February

- Target Hazard Training at Windjammer
- Safety Committee Meeting at City Hall
- Live Fire Training at MPFD Training Facility
- Found Resolution to Coconut Joe's/Smuggler's issue
- LRA Meeting
- Lowcountry Regional Fire Marshal's Meeting at Citadel Mall
- Completed Fire Codes and Standards Training
- Completed Multiple Fire Inspections
- Gave tour of Station 1 to new 911 Dispatchers
- Attended Medical In-service training

**City of Isle of Palms  
Financial Statement Summary as of February 28, 2025  
(Dollars in Thousands)**

**REVENUES**

	YTD Actual	Annual Budget	Remaining to Collect	YTD Actual as a % of Budget	Current Annual Forecast	Forecast Above or (Below) Budget
General	\$ 9,132	\$ 14,827	\$ 5,695	62%	\$ 17,151	\$ 2,324
Capital Projects	488	2,660	2,172	18%	2,344	(316)
Muni Accom Tax	1,639	2,455	2,556	67%	2,613	158
Hospitality Tax	847	1,396	549	61%	1,554	158
State Accom Tax	2,164	3,732	1,568	58%	3,968	236
Beach Prserv Fee	1,501	2,535	1,034	59%	2,637	102
Marina	737	570	(167)	129%	984	414
Disaster Recovery	107	149	42	72%	127	(22)
All Other	307	255	(52)	121%	324	69
<b>Total All Funds</b>	<b>\$ 16,923</b>	<b>\$ 28,579</b>	<b>\$ 13,397</b>	<b>59%</b>	<b>\$ 31,702</b>	<b>\$ 3,123</b>

**TRANSFERS IN / (OUT)**

	YTD Actual	Annual Budget	Remaining to Transfer	YTD Actual as a % of Budget	Current Annual Forecast	Forecast Above or (Below) Budget
	\$ 888	\$ 1,212	\$ (324)	73%	\$ 1,212	\$ -
		1,239	(1,239)	0%	\$ 1,239	-
	(856)	(1,114)	258	77%	\$ (1,114)	-
		(528)	528	0%	\$ (528)	-
	(32)	(1,450)	1,418	2%	\$ (1,450)	-
			-		\$ -	-
		641	(641)	0%	\$ 641	-
	-	-	-		\$ -	-
	-	-	-		\$ -	-
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		<b>\$ -</b>	<b>\$ -</b>

**EXPENDITURES**

	YTD Actual	Annual Budget	Remaining to Spend	YTD Actual as a % of Budget	Current Annual Forecast	Forecast Above or (Below) Budget	YTD Actual Net Rev & Exp
	\$ 9,704	\$ 16,039	\$ 6,335	61%	\$ 15,986	\$ (53)	316
	1,105	2,619	1,514	42%	2,063	(556)	(617)
	617	1,303	686	47%	1,303	-	166
	753	977	224	77%	1,197	220	94
	926	2,639	1,713	35%	2,596	(43)	1,206
	1,627	1,803	176	90%	2,424	621	(126)
	449	805	356	56%	747	(58)	288
	38	13	(25)	292%	42	29	69
	289	370	81	78%	305	(65)	19
<b>Total</b>	<b>\$ 15,509</b>	<b>\$ 26,568</b>	<b>\$ 11,060</b>	<b>58%</b>	<b>\$ 26,663</b>	<b>\$ 95</b>	<b>\$ 1,415</b>

**General Fund YTD Revenues and Transfers**

	FY25 YTD Actual	FY25 Budget	% of FY25 Budget	FY24 YTD Actual	% of Prior YTD	Current Annual Forecast	Forecast Above/ (Below) Budget
<b>Transfers</b>	\$ 888	\$ 1,212	73%	\$ 28	3171%	\$ 1,212	0
Property Tax	5,247	5,277	99%	4,899	107%	5,513	236
LO Sales Tax	608	1,136	54%	611	100%	1,210	74
Business License	966	1,985	49%	595	162%	2,249	264
Rental License	121	1,448	8%	149	81%	1,506	58
Other Lic (Insurance/Utilities)	8	1,873	0%	177	5%	2,001	128
Build Permits	783	611	128%	452	173%	838	227
State (Admin Fee, Aid to Subdvs)	175	335	52%	164	107%	346	11
Parking	443	1,378	32%	721	61%	1,378	-
All Other	781	784	100%	602	130%	2,110	1,326
<b>Total</b>	<b>\$ 10,020</b>	<b>\$ 16,039</b>	<b>62%</b>	<b>\$ 8,398</b>	<b>119%</b>	<b>\$ 18,363</b>	<b>\$ 2,324</b>

**General Fund YTD Expenditures**

(YTD target = 67%)

	FY25 YTD Actual	FY25 Budget	% of FY25 Budget	FY24 YTD Actual	% of Prior YTD	Current Annual Forecast	Forecast (Above)/ Below Budget
Mayor/Council	\$ 95	\$ 145	66%	\$ 91	104%	\$ 138	\$ 7
General Govt	1,116	2,609	43%	1,113	100%	2,640	(31)
Police	2,331	3,724	63%	2,181	107%	3,588	136
Fire	3,528	5,384	66%	3,028	117%	5,391	(7)
Public Works	1,205	1,894	64%	1,164	104%	1,920	(26)
Build & Lic	374	592	63%	364	103%	551	41
Recreation	801	1,269	63%	733	109%	1,261	8
Judicial	216	386	56%	231	94%	445	(59)
BSOs	38	36	106%	80	48%	52	(16)
<b>Total</b>	<b>\$ 9,704</b>	<b>\$ 16,039</b>	<b>61%</b>	<b>\$ 8,985</b>	<b>108%</b>	<b>\$ 15,986</b>	<b>\$ 53</b>

**City of Isle of Palms Supplemental Financial Information as of February 28, 2025 (Dollars in Thousands)**

<b>Cash Balances</b>		
	<b>2/28/2025</b>	<b>2/28/2024</b>
General Fund	5,656	5,484
<b>As a % of GF Exp (target is &gt; 30%)</b>	<b>35%</b>	<b>41%</b>
Capital Projects	15,287	12,859
Disaster Recovery	3,401	2,934
Marina	2,302	1,948
Tourism Funds	12,651	12,809
Beach Preservation	9,631	8,820
Other Restricted	218	204
Total All Cash	49,146	45,058
<b>Deposits at LGIP (4.5571%) Average</b>	<b>46,850</b>	<b>95%</b>
<b>Deposits at TRUIST</b>	<b>2,296</b>	<b>5%</b>
<b>RESTRICTED CASH</b>	<b>22,500</b>	<b>46%</b>

<b>Fund Balances</b>					
<b>Fund</b>	<b>6/30/2024 Audited Fund Balance (Note 1)</b>	<b>FY25 YTD Actual Net Revenues &amp; Transfers Less Expenses</b>	<b>Current Fund Balance</b>	<b>6/30/25 Budgeted Fund Balance</b>	<b>6/30/25 Forecast Fund Balance</b>
General Fund	\$ 4,812	\$ 316	5,128	\$ 5,698	\$ 6,930
Capital Projects	13,636	(617)	13,019	13,085	13,980
Muni Accom Tax	4,462	166	4,628	4,029	3,881
Hospitality Tax	2,046	94	2,140	1,004	1,269
State Accom Tax	4,893	1,206	6,099	4,285	4,076
Beach Funds	9,101	(126)	8,975	9,522	9,315
Marina (See Note 1)	2,805	(300)	2,505	1,812	2,629
Disaster Recovery	3,406	69	3,475	3,456	3,252
All Other	161	19	180	74	198
Total All Funds	\$ 45,322	\$ 827	\$ 46,149	\$ 42,965	\$ 45,530

*Note 1: The comparable amount for the Marina Enterprise Fund is not Fund Balance, but Unrestricted Net Position. To be consistent with the presentation of the other funds, the Marina Fund Balance does not include net fixed assets. Unrestricted net position is approx equal to net current assets for the Marina.*

**February 2025 Notes:**

Revenue streams for the first eight months of this fiscal cycle are aligning with FY25 projections. PCI Municipal parking revenue is reconciled and recorded by the 20th of each month, resulting in a consistent timing difference. Notably, business license and building permit revenues have significantly increased compared to the same period last year, indicating a rise in local business activities and construction projects. Expenditures for the first eight months of FY25 are within budget targets, currently at 61% of the budgeted 67%.

Year-to-date (YTD) revenue for the Marina shows a 29% favorable variance against the budget. This positive outcome is primarily driven by additional rent income totaling \$369K from Marina leases, broken down as follows:

- Marina Store \$16K
- Marina Operations \$83K
- Marina Restaurant \$270K

LGIP Investment accounts are averaging interest rates of 4.5571%, a decrease from the 4.6057% recorded the previous month. Total revenue is \$160K for February and \$1.489M for FY25.

The City has approximately \$49.1 million in Local Government Investment Pool and Truist cash deposits. Of the \$2.1 million in federal APRA funding received in FY22, \$112K remains unspent but has been obligated for FY25 budgeted. The remaining balance was allocated to the Marina Public Dock Expansion, which was completed February 2025 (\$1.342M) and has \$146K remaining on the construction contract and \$500K was obligated for Recreation Center new play ground equipment. There is \$1.5 million in unspent SCPRT funding for dredging, allocated for FY26. Additionally, \$22.5 million is restricted for tourism-related expenditures or beach preservation, and \$1 million from state funding is restricted for stormwater collection system and drainage improvements. The \$500K from SCPRT, restricted for ADA-compliant boardwalks to beach access, is budgeted for FY25, with \$328K already spent on planning, design and construction.



**City of Isle of Palms**

**Future Cash Needs for Capital Projects**

	Fund Balances									
	General Fund	Capital Projects Fund		Tourism Funds	Beach Preserve Fund	Disaster Recovery Fund	Marina Fund		All Other Funds	Total
		Unrestricted	Restricted Grants/Bond Proceeds	Restricted			Unrestricted	Restricted Grants Rec'd	Restricted	
<b>Cash Balances as of 2/28/2025</b>	<b>5,128,080</b>	<b>10,149,314</b>	<b>2,869,000</b>	<b>12,868,027</b>	<b>8,975,065</b>	<b>3,474,668</b>	<b>1,005,000</b>	<b>1,500,000</b>	<b>180,000</b>	<b>46,149,153</b>
<b><u>FY25 Budgeted Spending - All Capital Projects</u></b>										
Drainage <b>NOTE 1</b>			1,280,000	765,804						2,045,804
City Hall Renovation		83,334		166,666						250,000
Playground Equipment with pour & play surfacing		124,333		248,667					127,000	500,000
Vehicle & Equipment Purchases (all Depts)		275,499		1,081,671			125,000			1,482,170
Building & HVAC Maintenance (all Depts)		446,664		45,000			100,500			592,164
FEMA Flood Mitigation on Forest Trail		325,200								325,200
Fire Department Rescue Boat				300,000						300,000
Public Safety and Fire Station II Door Access Controls		62,500		127,500						190,000
Fuel management system & fuel dispensers	20,000									20,000
96 Gallon Carts (transition 4,500 carts over 3 yrs - side loader)	100,000									100,000
Front Beach/Ocean Blvd infrastructure improvements				75,000						75,000
Beach Maint- ADA Boardwalk, emergency vehicle access <b>NOTE 3</b>					765,000					765,000
Beach Renourishment					1,012,500					1,012,500
Bond and Loan Payments	882,811			651,199			83,464			1,617,474
<b>Subtotal FY25 Budgeted Capital Spending</b>	<b>1,002,811</b>	<b>1,317,530</b>	<b>1,280,000</b>	<b>3,461,507</b>	<b>1,777,500</b>	<b>-</b>	<b>308,964</b>	<b>-</b>	<b>127,000</b>	<b>9,275,312</b>
<b><u>Add Back FY25 actual spending against the Capital Budget above.</u></b>										
<b><u>The 2/28/25 Cash Balance has already been reduced by these payments.</u></b>	<b>288,038</b>	<b>503,098</b>	<b>547,910</b>	<b>1,008,247</b>	<b>555,731</b>	<b>-</b>	<b>41,160</b>	<b>-</b>	<b>-</b>	<b>2,944,184</b>
<b><u>Upcoming Large Projects Future Years</u></b>										
Drainage (4 Year Forecast) <b>NOTE 2</b>		2,600,000		788,080						3,388,080
Dredging (FY26 Forecast)							1,500,000			1,500,000
Ongoing Emergency Beach Scraping/Truck In Operation					855,628					855,628
Large Offshore Dredging Project-North End of Island										-
Stormwater Collection System/Drainage Improvement <b>NOTE 2</b>			1,000,000							1,000,000
North & South End Beach Renourishments & Mobilization <b>NOTE 5</b>					16,250,000					16,250,000
<b>Subtotal Upcoming Large Projects</b>	<b>-</b>	<b>2,600,000</b>	<b>1,000,000</b>	<b>788,080</b>	<b>17,105,628</b>	<b>-</b>	<b>-</b>	<b>1,500,000</b>	<b>-</b>	<b>22,993,708</b>
<b>Ending Fund Balance</b>	<b>4,413,307</b>	<b>6,734,882</b>	<b>1,136,910</b>	<b>9,626,686</b>	<b>(9,352,332)</b>	<b>3,474,668</b>	<b>737,196</b>	<b>-</b>	<b>53,000</b>	<b>16,824,317</b>
Fire Engines (2 Forecasted in next 4 Years) <b>NOTE 4</b>		1,333,333		2,666,667						4,000,000
Public Works Garbage Trucks (3 forecasted in next 5 years) <b>NOTE 4</b>		366,667		733,333						1,100,000
City Hall Renovation FY28 <b>NOTE 4</b>		1,333,333		2,666,667						4,000,000
<b>Total Ending Fund Balance Remaining</b>	<b>4,413,307</b>	<b>3,701,549</b>	<b>1,136,910</b>	<b>3,560,020</b>	<b>(9,352,332)</b>	<b>3,474,668</b>	<b>737,196</b>	<b>-</b>	<b>53,000</b>	<b>7,724,317</b>

**Notes:**

- NOTE 1** City expects to receive 90% of the Waterway Path project cost via FEMA grant. The expected grant has been awarded but not received.
- NOTE 2** Includes \$2.1 million for projects identified in the City's Comprehensive Drainage Plan in FY25 on Palm Blvd between 37th and 41st and \$2.2M for FY26.
- NOTE 3** This forecast includes new funding received in January 2024 \$1.5 million in new State funding for drainage (\$1M) and ADA Boardwalks (\$.5M)
- NOTE 4** FY26-FY28 Budget forecast as debt service expenditures
- NOTE 5** Next major beach nourishment projected for FY26. Funding and Wild Dunes allocation TBD.
- NOTE 6** This forecast includes new funding received in December 2024 \$1.250 million in new State funding for Stormwater drainage in Capital Fund balance.

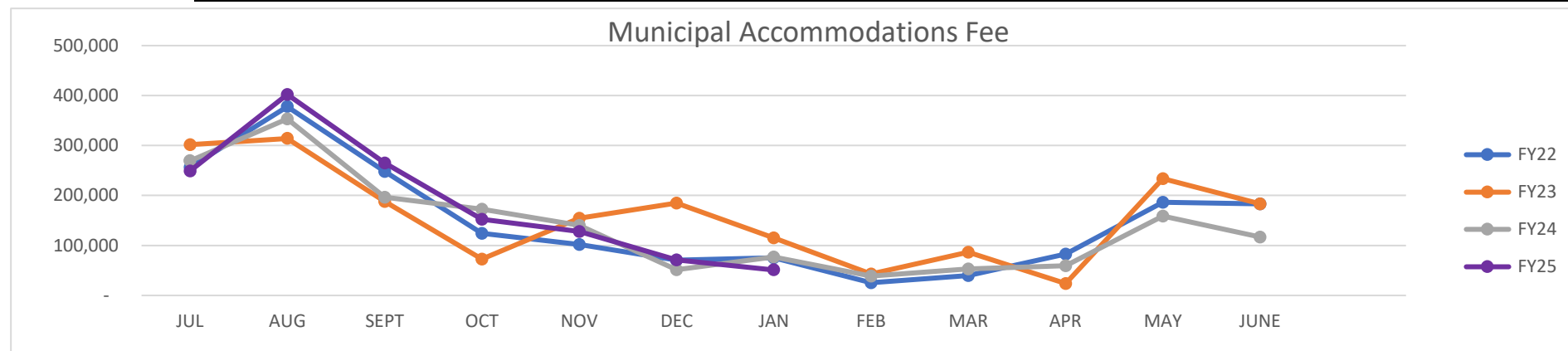


## City of Isle of Palms Tourism and Local Options Sales Tax Revenues

Heads in  
Beds in

Municipal Accommodations Fee		(1% of Accommodation Sales)					
	FY19	FY20	FY21	FY22	FY23	FY24	FY25
<b>JUL</b>	199,724	195,287	172,336	256,308	301,674	269,304	248,910
<b>AUG</b>	209,600	213,067	169,596	378,001	314,397	353,373	402,136
<b>SEPT</b>	152,535	152,561	186,938	248,118	187,966	196,701	265,083
<b>OCT</b>	79,534	75,506	129,033	124,372	72,522	172,495	152,171
<b>NOV</b>	63,444	65,882	66,090	102,229	154,713	140,390	127,772
<b>DEC</b>	40,182	34,301	71,683	70,478	185,019	51,584	71,399
<b>JAN</b>	25,836	32,335	34,025	75,503	115,313	76,915	51,474
<b>FEB</b>	13,666	18,596	26,709	25,613	42,912	39,014	
<b>MAR</b>	19,983	9,690	31,080	39,938	86,414	52,979	
<b>APR</b>	53,685	26,422	68,055	82,759	24,152	59,390	
<b>MAY</b>	90,800	7,181	125,288	186,478	233,832	158,991	
<b>JUNE</b>	97,999	55,311	153,337	183,011	183,028	117,085	
<b>Deduct last July</b>	(199,724)	(195,287)	(172,336)	(256,308)	(301,674)	(269,304)	(248,910)
<b>Add next July</b>	195,287	172,336	256,308	301,674	269,304	248,910	
<b>Total Fiscal Year</b>	<b>1,042,551</b>	<b>863,187</b>	<b>1,318,141</b>	<b>1,818,174</b>	<b>1,869,571</b>	<b>1,667,828</b>	<b>1,070,035</b>
	<b>Incr from FY18</b>	<b>Incr from FY19</b>	<b>Incr from FY20</b>	<b>Incr from FY21</b>	<b>Incr from FY22</b>	<b>Incr from FY23</b>	<b>Incr from FY24</b>
	<b>-3%</b>	<b>-17%</b>	<b>53%</b>	<b>38%</b>	<b>3%</b>	<b>-11%</b>	<b>5%</b>

JUN  
JUL  
AUG  
SEPT  
OCT  
NOV  
DEC  
JAN  
FEB  
MAR  
APR  
MAY  
  
JUN

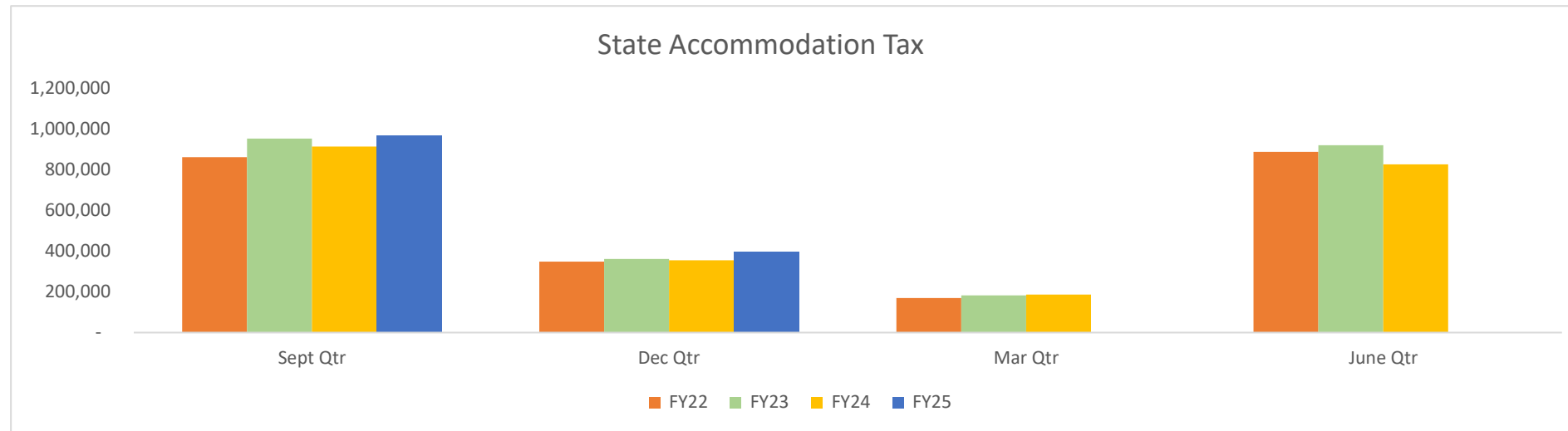


## City of Isle of Palms Tourism and Local Options Sales Tax Revenues

State Accommodations Tax (Tourism-Related Only)		(Approx 2% of Accommodation Sales)					
	FY19	FY20	FY21	FY22	FY23	FY24	FY25
Sept Qtr	546,269	580,306	553,971	861,205	952,270	913,073	969,092
Dec Qtr	203,067	181,550	252,012	347,299	360,479	353,735	396,649
Mar Qtr	103,097	88,638	132,256	168,824	181,961	185,736	
June Qtr	445,779	242,893	650,839	886,253	919,402	825,405	
<b>Total Fiscal Yr</b>	<b>1,298,212</b>	<b>1,093,387</b>	<b>1,589,078</b>	<b>2,263,580</b>	<b>2,414,112</b>	<b>2,277,948</b>	<b>1,365,741</b>
	<b>8%</b> Incr from FY18	<b>-16%</b> Incr from FY19	<b>45%</b> Incr from FY20	<b>42%</b> Incr from FY21	<b>7%</b> Incr from FY22	<b>-6%</b> Incr from FY23	<b>28%</b> Incr from FY24

Heads in  
Beds in

Jun-Aug  
Sept-Nov  
Dec-Feb  
Mar-May

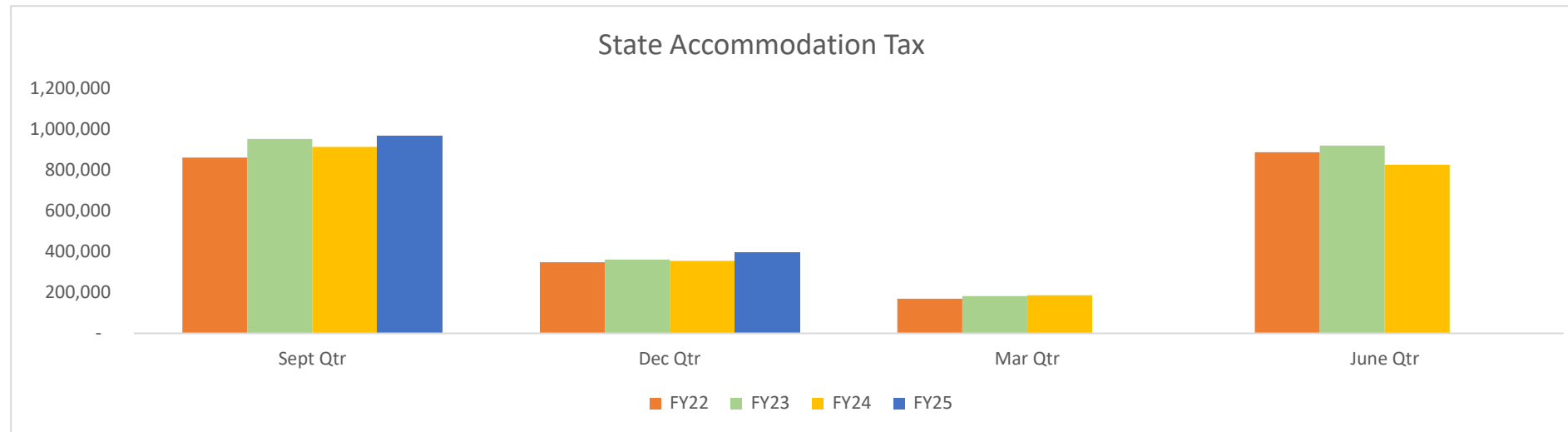


# City of Isle of Palms Tourism and Local Options Sales Tax Revenues

**Heads in  
Beds in**

<b>State Accommodations Tax (Tourism-Related Only)</b>		<i>(Approx 2% of Accommodation Sales)</i>					
	FY19	FY20	FY21	FY22	FY23	FY24	FY25
Sept Qtr	546,269	580,306	553,971	861,205	952,270	913,073	969,092
Dec Qtr	203,067	181,550	252,012	347,299	360,479	353,735	396,649
Mar Qtr	103,097	88,638	132,256	168,824	181,961	185,736	
June Qtr	445,779	242,893	650,839	886,253	919,402	825,405	
<b>Total Fiscal Yr</b>	<b>1,298,212</b>	<b>1,093,387</b>	<b>1,589,078</b>	<b>2,263,580</b>	<b>2,414,112</b>	<b>2,277,948</b>	<b>1,365,741</b>
	<b>8%</b> Incr from FY18	<b>-16%</b> Incr from FY19	<b>45%</b> Incr from FY20	<b>42%</b> Incr from FY21	<b>7%</b> Incr from FY22	<b>-6%</b> Incr from FY23	<b>8%</b> Incr from FY24

Jun-Aug  
Sept-Nov  
Dec-Feb  
Mar-May



## City of Isle of Palms Tourism and Local Options Sales Tax Revenues

### Hospitality Tax

*(2% of Prepared Food & Beverage Sales)*

**Food/Bev  
Sold in**

	FY19	FY20	FY21	FY22	FY23	FY24	FY25	
<b>JUL</b>	104,681	88,238	66,947	137,933	142,534	156,544	205,329	<b>JUN</b>
<b>AUG</b>	101,031	106,673	59,353	135,765	165,544	192,906	214,952	<b>JUL</b>
<b>SEPT</b>	78,014	78,129	49,484	108,077	131,756	153,918	117,363	<b>AUG</b>
<b>OCT</b>	69,394	76,033	37,348	88,581	121,169	131,767	140,325	<b>SEPT</b>
<b>NOV</b>	65,210	66,929	27,609	96,511	104,213	138,970	110,540	<b>OCT</b>
<b>DEC</b>	38,440	56,591	46,700	56,990	87,532	67,821	97,545	<b>NOV</b>
<b>JAN</b>	31,905	28,058	57,988	48,652	57,107	63,500	54,181	<b>DEC</b>
<b>FEB</b>	27,373	27,574	24,135	33,118	51,417	50,025	55,450	<b>JAN</b>
<b>MAR</b>	40,741	21,853	39,019	62,430	62,919	66,488		<b>FEB</b>
<b>APR</b>	66,425	12,956	50,777	79,088	117,561	134,944		<b>MAR</b>
<b>MAY</b>	85,134	15,429	85,357	142,227	142,964	143,278		<b>APR</b>
<b>JUNE</b>	100,621	46,102	114,802	152,842	155,895	155,603		<b>MAY</b>
<b>Deduct last July</b>	(104,681)	(88,238)	(66,947)	(137,933)	(142,534)	(156,544)	(205,329)	
<b>Add next July</b>	88,238	66,947	137,933	142,534	156,544	205,329		<b>JUN</b>
<b>Total Fiscal Year</b>	<b>792,527</b>	<b>603,275</b>	<b>730,503</b>	<b>1,146,816</b>	<b>1,354,621</b>	<b>1,504,549</b>	<b>790,357</b>	

<b>Incr fr FY18</b>	<b>Incr fr FY19</b>	<b>Incr fr FY20</b>	<b>Incr fr FY21</b>	<b>Incr fr FY22</b>	<b>Incr fr FY23</b>	<b>Incr from FY24</b>
1%	-24%	21%	57%	18%	11%	4%



## City of Isle of Palms Tourism and Local Options Sales Tax Revenues

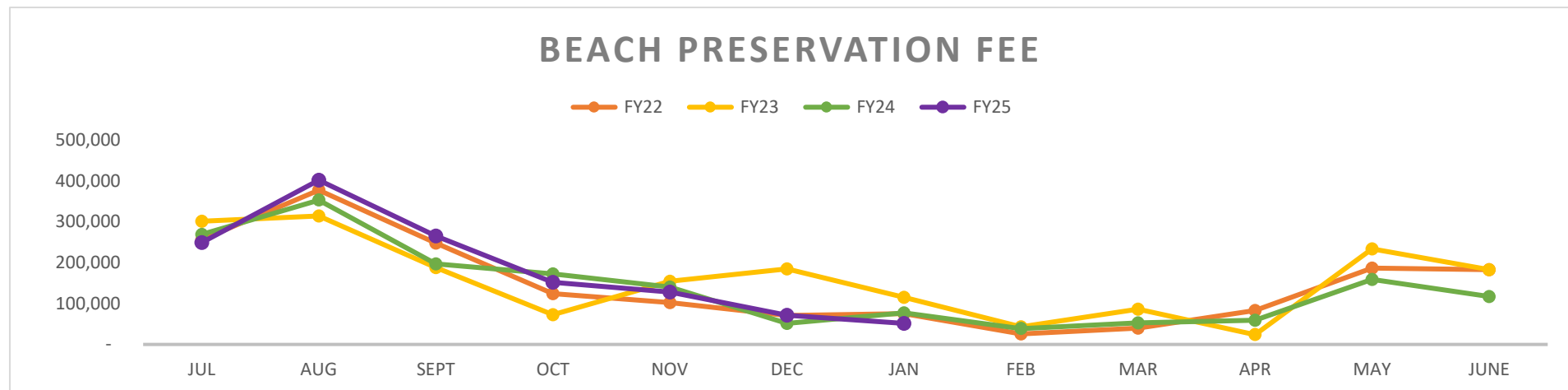
### Beach Preservation Fee

*(1% of Accommodation Sales)*

Heads in  
Beds in

	FY19	FY20	FY21	FY22	FY23	FY24	FY25	
<b>JUL</b>	199,724	195,287	172,336	256,308	301,674	269,304	248,910	JUN
<b>AUG</b>	209,600	213,067	169,596	378,001	314,397	353,373	402,136	JUL
<b>SEPT</b>	152,535	152,561	186,938	248,118	187,966	196,701	265,083	AUG
<b>OCT</b>	79,534	75,506	129,033	124,372	72,522	172,495	152,171	SEPT
<b>NOV</b>	63,444	65,882	66,090	102,229	154,713	140,390	127,772	OCT
<b>DEC</b>	40,182	34,301	71,683	70,478	185,019	51,584	71,399	NOV
<b>JAN</b>	25,836	32,335	34,025	75,503	115,313	76,915	51,474	DEC
<b>FEB</b>	13,666	18,596	26,709	25,613	42,912	39,014	-	JAN
<b>MAR</b>	19,983	9,690	31,080	39,938	86,414	52,979	-	FEB
<b>APR</b>	53,685	26,422	68,055	82,759	24,152	59,390	-	MAR
<b>MAY</b>	90,800	7,181	125,288	186,478	233,832	158,991	-	APR
<b>JUNE</b>	97,999	55,311	153,337	183,011	183,028	117,085	-	MAY
<b>Deduct last July</b>	(199,724)	(195,287)	(172,336)	(256,308)	(301,674)	(269,304)	(248,910)	
<b>Add next July</b>	195,287	172,336	256,308	301,674	269,304	248,910	-	JUN
<b>Total Fiscal Year</b>	<b>1,042,551</b>	<b>863,187</b>	<b>1,318,141</b>	<b>1,818,174</b>	<b>1,869,571</b>	<b>1,667,828</b>	<b>1,070,035</b>	

<b>Incr from FY18</b>	<b>Incr from FY19</b>	<b>Incr from FY20</b>	<b>Incr from FY21</b>	<b>Incr from FY22</b>	<b>Incr from FY23</b>	<b>Incr from FY24</b>
<b>-3%</b>	<b>-17%</b>	<b>53%</b>	<b>38%</b>	<b>3%</b>	<b>-11%</b>	<b>5%</b>



## City of Isle of Palms Tourism and Local Options Sales Tax Revenues

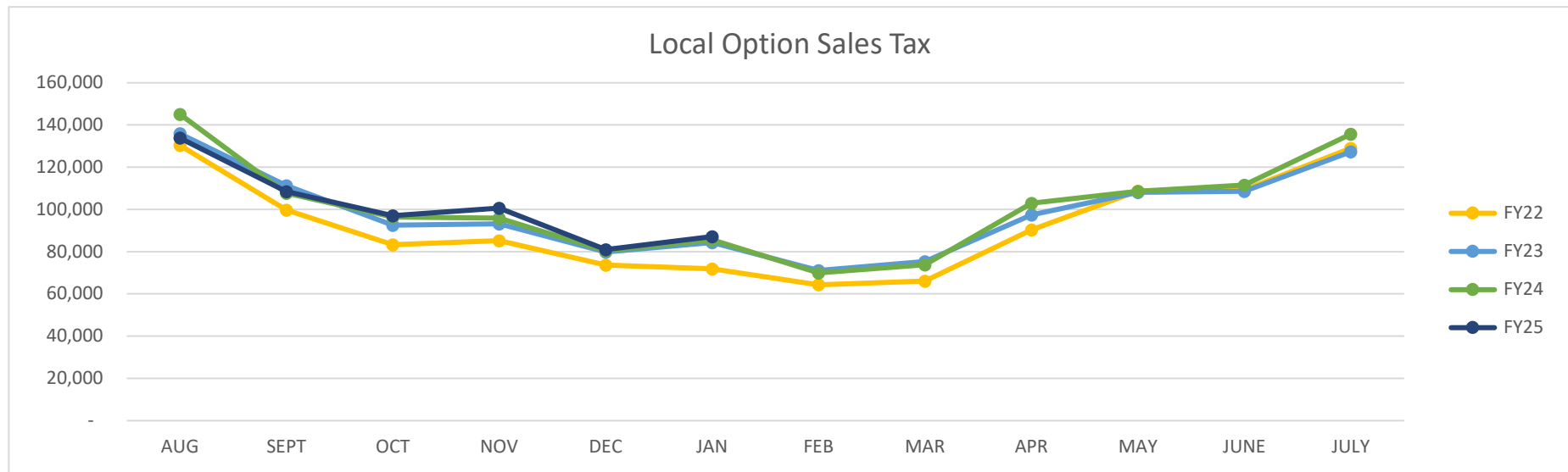
### Local Option Sales Tax

*(a portion of the 1% Charleston County local option sales tax)*

When Sales  
Occurred

	FY19	FY20	FY21	FY22	FY23	FY24	FY25	
<b>AUG</b>	88,713	93,221	87,833	130,373	135,943	145,078	133,876	<b>JUL</b>
<b>SEPT</b>	72,557	83,456	83,149	99,719	111,272	107,689	108,408	<b>AUG</b>
<b>OCT</b>	63,829	62,752	71,963	83,230	92,568	96,340	97,068	<b>SEPT</b>
<b>NOV</b>	61,435	65,514	68,054	85,199	93,138	95,825	100,650	<b>OCT</b>
<b>DEC</b>	54,748	59,951	67,342	73,716	79,844	80,288	81,040	<b>NOV</b>
<b>JAN</b>	57,483	64,996	69,592	71,846	84,290	85,635	87,113	<b>DEC</b>
<b>FEB</b>	48,026	53,263	58,840	64,365	71,140	69,936		<b>JAN</b>
<b>MAR</b>	49,240	50,882	60,533	66,029	75,337	73,750		<b>FEB</b>
<b>APR</b>	65,794	43,070	83,678	90,351	97,399	102,911		<b>MAR</b>
<b>MAY</b>	85,394	56,012	100,082	108,756	108,050	108,648		<b>APR</b>
<b>JUNE</b>	78,238	74,078	102,313	109,271	108,590	111,500		<b>MAY</b>
<b>JULY</b>	92,504	92,789	117,380	128,957	127,335	135,705		<b>JUN</b>
<b>Total Fiscal Year</b>	<b>817,962</b>	<b>799,984</b>	<b>970,759</b>	<b>1,111,813</b>	<b>1,184,906</b>	<b>1,213,304</b>	<b>608,156</b>	

<b>Incr from FY18</b>	<b>Incr from FY19</b>	<b>Incr from FY20</b>	<b>Incr from FY21</b>	<b>Incr from FY22</b>	<b>Incr from FY23</b>	<b>Incr from FY24</b>
<b>6%</b>	<b>-2%</b>	<b>21%</b>	<b>15%</b>	<b>7%</b>	<b>2%</b>	<b>0%</b>



**City of Isle of Palms**  
**Beach Access Path Improvements -ADA Boardwalks at 46th and 52nd Avenues**  
**2/28/2025**

		<b>Date</b>	<b>Invoice Number</b>	<b>Contract Projections</b>	<b>Actuals</b>	<b>Approved by Council</b>	<b>Remaining on Contract</b>	<b>Remaining on Budget</b>
<b>Planning</b>				<b>26,900</b>		<b>500,000</b>	<b>26,900</b>	<b>500,000</b>
Peabody & Associates	46th Avenue	11/17/2023	7465		2,800		(2,800)	(2,800)
Peabody & Associates	52nd Avenue	11/17/2023	7465		2,800		(2,800)	(2,800)
Peabody & Associates	26th Avenue	11/17/2023	7465		2,800		(2,800)	(2,800)
Peabody & Associates	36th Avenue	11/17/2023	7465		2,800		(2,800)	(2,800)
Peabody & Associates	26th Avenue	3/29/2024	7575		2,800		(2,800)	(2,800)
Peabody & Associates	46th and 52nd Avenues	10/14/2024	7720		700		(700)	(700)
							-	-
<b>Land Design</b>							-	-
Furman LandDesign, LLC	46th Avenue	8/20/2024	Isle of Palms-Boardwalk 46th		3,450		(3,450)	(3,450)
	52nd Avenue	8/20/2024	Isle of Palms-Boardwalk 52nd		3,450		(3,450)	(3,450)
	26th Avenue	8/20/2024	Isle of Palms-Boardwalk 26th		3,000		(3,000)	(3,000)
	36th Avenue	8/20/2024	Isle of Palms-Boardwalk 36th		3,000		(3,000)	(3,000)
<b>Construction</b>				<b>298,204</b>			<b>298,204</b>	
Icon Contracting, LLC	46th and 52nd Beach Acc	10/18/2024	1045		80,915		(80,915)	(80,915)
	46th and 52nd Beach Acc	11/4/2024	1047		98,956		(98,956)	(98,956)
	46th and 52nd Beach Acc	1/17/2025	1058		120,332		(120,332)	(120,332)
							-	-
				<b>325,104</b>	<b>327,804</b>	<b>500,000</b>	<b>(2,700)</b>	<b>172,197</b>
<b>Total Project</b>				<b>325,104</b>	<b>327,804</b>	<b>500,000</b>	<b>(2,700)</b>	<b>172,197</b>

Note:  
 ADA Boardwalks at 46th and 52nd Ave Funded by FY24 SCPRT \$500K Grant

**City of Isle of Palms**  
**Boardwalk and Foot Bridges - 26th and 36th Avenue**  
**Project Number RFB 2024-07**  
**2/28/2025**

	<b>Date</b>	<b>Invoice Number</b>	<b>Contract Projections</b>	<b>Actuals</b>	<b>Approved by Council</b>	<b>Remaining on Contract</b>	<b>Remaining on Budget</b>
<b>Grading, compacting, construction</b>			<b>261,338</b>		<b>250,000</b>	<b>261,338</b>	<b>250,000</b>
Beach Contruction Company							-
26th and 36th Boardwalks	1/1/2025	755		89,872		(89,872)	(89,872)
36th Boardwalks	1/21/2025	761		32,010		(32,010)	(32,010)
26th and 36th Boardwalks	2/10/2025	762		78,261		(78,261)	(78,261)
26th and 36th Boardwalks	2/26/2025	764		32,785		(32,785)	(32,785)
<b>Site Assessment</b>							
Terracon Consultants	11/20/2024	PEN247345	1,500	1,500		(1,500)	(1,500)
			<b>262,838</b>	<b>234,428</b>	<b>250,000</b>	<b>26,910</b>	<b>15,572</b>
<b>Total Project</b>			<b>262,838</b>	<b>234,428</b>	<b>250,000</b>	<b>26,910</b>	<b>15,572</b>

Note:  
 Greenbelt Program Funding  
 Construction of boardwalks/foot bridges at 26A and 36A, seeking Greenbelt Program Funding



**City of Isle of Palms**  
**IOP County Park Emergency Vehicle Access -14th Avenue**  
**2/28/2025**

		Date	Invoice Number	Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
<b>Survey,Planning &amp; Drawings</b>				<b>15,400</b>		<b>250,000</b>	<b>15,400</b>	<b>250,000</b>
Davis & Floyd, Inc.	14th Avenue	6/2/2023	280035		3,950		(3,950)	(3,950)
Davis & Floyd, Inc.	14th Avenue	12/3/2023	281758		3,950		(3,950)	(3,950)
Davis & Floyd, Inc.	14th Avenue Civil Engineer	10/29/2024	284709		7,500		(7,500)	(7,500)
				<b>15,400</b>	<b>15,400</b>	<b>250,000</b>	<b>-</b>	<b>234,600</b>
<b>Total Project</b>				<b>15,400</b>	<b>15,400</b>	<b>250,000</b>	<b>-</b>	<b>234,600</b>

Note:  
 Beach Preservation Fund \$200K (City requesting \$250K from FY25 State A Tax budget)

**City of Isle of Palms  
City Hall Renovation**

**PO-24-2521**

**2/28/2025**

	<b>Date</b>	<b>Invoice Number</b>	<b>Contract Projections</b>	<b>Actuals</b>	<b>Approved by Council</b>	<b>Remaining on Contract</b>	<b>Remaining on Budget</b>
<b>Architecture-Conceptual Design Phase 1</b>			24,840		<b>250,000</b>	<b>24,840.00</b>	<b>250,000</b>
McMillan Pazdan Smith Architecture	4/13/2024	2400175		2,484		(2,484.00)	(2,484)
McMillan Pazdan Smith Architecture	4/13/2024	2401541		16,146		(16,146.00)	(16,146)
McMillan Pazdan Smith Architecture	5/31/2024	2401902		6,210		(6,210.00)	(6,210)
<b>Architecture-Conceptual Design Phase 2 Project 023410.00</b>			9,250			9,250.00	
McMillan Pazdan Smith Architecture	6/30/2024	2402415		2,313		(2,312.50)	(2,313)
McMillan Pazdan Smith Architecture	8/31/2024	2403451		6,972		(6,972.19)	(6,972)
McMillan Pazdan Smith Architecture	12/30/2024	Refunded		(6,972)		6,972.12	6,972
			<b>34,090</b>	<b>27,153</b>	<b>250,000</b>	<b>6,937</b>	<b>222,847</b>
<b>Contract Planning Phase 1</b>			68,267			68,267	
<b>Change Order 1/Reno Option</b>			17,010			17,010	
Trident Construction Co.	2/2/2024	23045-1		11,233		(11,233.00)	(11,233)
Trident Construction Co.	2/29/2024	23045-2		18,906		(18,906.00)	(18,906)
Trident Construction Co.	8/19/2024	23045-3		38,128		(38,128.00)	(38,128)
Trident Construction Co.	7/10/2024	23045-4		17,010		(17,010.00)	(17,010)
			<b>85,277</b>	<b>85,277</b>	<b>-</b>	<b>-</b>	<b>(85,277)</b>
<b>Total Project</b>			<b>119,367</b>	<b>112,430</b>	<b>250,000</b>	<b>6,937</b>	<b>137,570</b>

**City of Isle of Palms**  
**Island Wide Beach Monitoring- Minor Project**  
**2/28/2025**

Project 2618

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
					106,000		106,000
<b>Planning/ Liaison/Communication</b>			13,560			13,560	
Coastal Science & Engineering							
Coastal Science & Engineering	9/30/2024	2618.09.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	10/31/2024	2618.10.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	11/30/2024	2618.11.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	12/31/2024	2618.12.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	1/31/2025	2618.01.25		3,000		(3,000)	(3,000)
			-	-	-	-	-
			13,560	7,000	-	6,560	(7,000)
<b>Semi Annual Beach Condition Survey</b>			32,760			32,760	
Coastal Science & Engineering	9/30/2024	2618.09.24		11,466		(11,466)	(11,466)
Coastal Science & Engineering	10/31/2024	2618.10.24		7,750	-	(7,750)	(7,750)
							-
			32,760	19,216	-	13,544	(19,216)
<b>Semi Annual Aerial Photography</b>			12,400			12,400	-
Coastal Science & Engineering	11/30/2024	2618.11.24		6,500		(6,500)	(6,500)
			12,400	6,500	-	5,900	(6,500)
<b>Semi Annual Report</b>			24,760			24,760	
Coastal Science & Engineering	10/31/2024	2618.10.24		4,050		(4,050)	(4,050)
Coastal Science & Engineering	11/30/2024	2618.11.24		10,650	-	(10,650)	(10,650)
Coastal Science & Engineering	12/31/2024	2618.12.24		2,475		(2,475)	(2,475)
Coastal Science & Engineering	1/31/2025	2618.01.25		4,500		(4,500)	(4,500)
						-	-
			24,760	21,675	-	3,085	(21,675)
<b>Direct Expenses including equipment</b>			15,310			15,310	
Coastal Science & Engineering	9/30/2024	2618.09.24		6,066	-	(6,066)	39 (6,066)

**City of Isle of Palms  
Emergency Beach Erosion Control Efforts  
2/28/2025**

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
<b>Post Hurricane Idalia Scraping Work (Breach Inlet &amp; Beachwood East)</b>							
Robert Collins Company	9/15/2023	Invoice 27823	240,000	240,000	-	-	(240,000)
			-	-	-	-	-
			<u>240,000</u>	<u>240,000</u>	<u>-</u>	<u>-</u>	<u>(240,000)</u>
<b>Breach Inlet Sand Bags (120-206 Ocean Blvd.)</b>							
					722,500	722,500	722,500
Robert Collins Company	10/22/2023	Invoice 28035	213,825	213,825		(213,825)	(213,825)
Robert Collins Company	10/10/2023	Invoice 27984	79,800	79,800	-	(79,800)	(79,800)
SCPRT Beach Renourishment Assistance Funding Grant	2/29/2024	2024-001-1		(146,813)		146,813	146,813
Robert Collins Company	7/26/2024	Invoice 29178	120,000	120,000		(120,000)	(120,000)
Robert Collins Company	9/12/2024	Invoice 29322	9,000	9,000		(9,000)	(9,000)
Robert Collins Company	9/25/2024	Invoice 29360	174,000	174,000		(174,000)	(174,000)
SCPRT Beach Renourishment Assistance Funding Grant	10/16/2024	2024-001		(87,000)		87,000	87,000
Precision Consulting Solutions	12/2/2024	1047		59,000		(59,000)	(59,000)
Precision Consulting Solutions	1/1/2025	1051		11,500		(11,500)	(11,500)
			<u>596,625</u>	<u>421,813</u>	<u>722,500</u>	<u>300,688</u>	<u>300,688</u>
<b>Breach Inlet Scraping/ Trucking up to 50,000 cy sand</b>							
					1,250,000	1,250,000	1,250,000
Robert Collins Company	11/28/2023	Invoice 28216	293,355	293,355	-	(293,355)	(293,355)
Robert Collins Company	11/28/2023	Invoice 28217	172,350	172,350		(172,350)	(172,350)
Robert Collins Company	12/22/2023	Invoice 28338	163,821	163,821	-	(163,821)	(163,821)
Robert Collins Company	2/2/2024	Invoice 28491	358,595	358,595	-	(358,595)	(358,595)
Robert Collins Company	2/28/2024	Invoice 28642	87,450	87,450		(87,450)	(87,450)
SCPRT Beach Renourishment Assistance Funding Grant	2/29/2024	2024-001-1		(228,588)			228,588
SCPRT Beach Renourishment Assistance Funding Grant	2/29/2024	2024-001-1		(86,175)	-		86,175
SCPRT Beach Renourishment Assistance Funding Grant	2/29/2024	2024-001-2		(179,298)			179,298
Robert Collins Company	3/22/2024	Invoice 28773	10,000	10,000		(10,000)	(10,000)
SCPRT Beach Renourishment Assistance Funding Grant	5/6/2024	2024-001-3		(43,725)			43,725
Robert Collins Company	6/12/2024	Invoice 29031	25,400	25,400		(25,400)	(25,400)
Robert Collins Company	8/12/2024	Invoice 29225	31,500	31,500		(31,500)	(31,500)
Robert Collins Company	9/30/2024	Invoice 29379	47,300	47,300		(47,300)	(47,300)
SCPRT Beach Renourishment Assistance Funding Grant	10/16/2024	2024-001		(12,700)			12,700
SCPRT Beach Renourishment Assistance Funding Grant	2/5/2025	2025-001		(23,650)			23,650
							-
			<u>1,189,771</u>	<u>615,636</u>	<u>1,250,000</u>	<u>60,229</u>	<u>634,364</u>
<b>Beachwood East Scraping &amp; Sand Bags</b>							
					612,500	612,500	612,500
Robert Collins Company	2/2/2024	Invoice 28492	106,650	106,650	-	(106,650)	(106,650)
Robert Collins Company	2/28/2024	Invoice 28643	127,350	127,350	-	(127,350)	(127,350)
Robert Collins Company	7/31/2024	Invoice 28182	45,000	45,000	-	(45,000)	(45,000)
Robert Collins Company	8/26/2024	Invoice 29253	66,000	66,000	-	(66,000)	(66,000)
Precision Consulting Solutions	9/10/2024	Invoice 131	15,200	15,200		(15,200)	(15,200)
Precision Consulting Solutions	10/6/2024	Invoice 1034	15,200	15,200		(15,200)	(15,200)
Precision Consulting Solutions	10/7/2024	Invoice 1037	23,475	23,475		(23,475)	(23,475)

**City of Isle of Palms  
Emergency Beach Erosion Control Efforts  
2/28/2025**

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
<b>Geotex Supply Company</b>	10/16/2024	Invoice 1004	2,760	2,760		(2,760)	(2,760)
<b>Precision Consulting Solutions</b>	10/10/2024	Invoice 1039	58,010	58,010		(58,010)	(58,010)
<b>Precision Consulting Solutions</b>	10/23/2024	Invoice 1040	65,195	65,195		(65,195)	(65,195)
<b>Precision Consulting Solutions</b>	11/8/2024	Invoice 1044	88,500	88,500		(88,500)	(88,500)
			<u>613,340</u>	<u>524,840</u>	<u>612,500</u>	<u>(840)</u>	<u>(840)</u>
<b>CSE Engineering &amp; Construction Admin</b>					207,783	207,783	207,783
Coastal Science & Engineering	11/30/2023	Invoice 2587.11.23	34,200	34,200		(34,200)	(34,200)
Coastal Science & Engineering	12/31/2023	Invoice 2587.12.23	10,900	10,900		(10,900)	(10,900)
Coastal Science & Engineering	1/31/2024	Invoice 2587.01.24	10,831	10,831		(10,831)	(10,831)
Coastal Science & Engineering	3/31/2024	Invoice 2587.02.24	9,069	9,069		(9,069)	(9,069)
Coastal Science & Engineering	5/31/2024	Invoice 2587.05.24	25,925	25,925		(25,925)	(25,925)
Coastal Science & Engineering (Amendment #2)	6/30/2024	Invoice 2587.06.24	33,734	5,879		(5,879)	(5,879)
Coastal Science & Engineering (Amendment #2)	8/31/2024	Invoice 2587.08.24		1,130		(1,130)	(1,130)
Coastal Science & Engineering (Amendment #3)	8/31/2024	Invoice 2587.08.24	83,124	18,370		(18,370)	(18,370)
Coastal Science & Engineering	9/30/2024	Invoice 2587.09.24		10,042		(10,042)	(10,042)
Coastal Science & Engineering (Amendment #3)	10/31/2024	Invoice 2587.10.24		10,412		(10,412)	(10,412)
Coastal Science & Engineering	11/30/2024	Invoice 2587.11.24		8,176		(8,176)	(8,176)
Coastal Science & Engineering	12/31/2024	Invoice 2587.12.24		13,031		(13,031)	(13,031)
Coastal Science & Engineering	1/31/2025	Invoice 2587.01.25		7,350		(7,350)	(7,350)
			<u>207,783</u>	<u>165,315</u>	<u>207,783</u>	<u>42,468</u>	<u>42,468</u>
<b>Total Project</b>			<u>2,607,519</u>	<u>1,727,603</u>	<u>2,792,783</u>	<u>402,544</u>	<u>976,679</u>

**Notes:**

1. Initial cost of \$240K- Post Hurricane Idalia Scraping Work (Breach Inlet & Beachwood East) is not included in project total.
2. In August 2024, 75% of initial \$240K cost has been approved by FEMA to cover \$180K.
3. City seeking FEMA reimbursement for post storm scraping.
4. City requesting SCPRT Grant for 50% of construction costs of Breach Inlet Sandbags (250K) and Scraping/Trucking (1.25M).
5. City has been approved up to \$850K from SCRPT for Beach Renourishment Funding Assistance Grant.
  - City awarded \$179.2K from SCRPT for Beach Renourishment Funding Assistance Grant which is reflected in remaining budget amount.
  - City awarded \$461.5K from SCRPT for Beach Renourishment Funding Assistance Grant which is reflected in remaining budget amount.
  - City awarded \$43.7K from SCRPT for Beach Renourishment Funding Assistance Grant which is reflected in remaining budget amount.

City of Isle of Palms  
**Major Offshore Dredging**  
**2/28/2025**  
**SCOPE D**      Project 2623

		Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
				843,620		843,620
<b>Project Planning related Renourishment</b>		27,960			27,960	
Coastal Science & Engineering	2623.11.24		1,250		(1,250)	(1,250)
Coastal Science & Engineering	2623.12.24		1,678		(1,678)	(1,678)
Coastal Science & Engineering	2623.01.25		500		(500)	(500)
		27,960	3,428	-	24,532	(3,428)
<b>Beach &amp; Borrow Area Condition Surveys Renourishment</b>		60,560			60,560	
Coastal Science & Engineering	2623.11.24		1,225		(1,225)	(1,225)
		60,560	1,225	-	59,335	(1,225)
<b>Engineering related Renourishment</b>		39,680			39,680	-
Coastal Science & Engineering	2623.12.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	2623.01.25		2,590		(2,590)	(2,590)
		39,680	3,590	-	36,090	(3,590)
<b>Permitting &amp; Enviromental Studies related Renourishment</b>		91,800			91,800	
Coastal Science & Engineering	2623.11.24		1,377	-	(1,377)	(1,377)
Coastal Science & Engineering	2623.12.24		3,672		(3,672)	(3,672)
Coastal Science & Engineering	2623.01.25		5,500		(5,500)	(5,500)
		91,800	10,549	-	81,251	(10,549)
<b>Direct Expenses related Renourishment</b>		38,620			38,620	
Coastal Science & Engineering	2623.12.24		318	-	(318)	(318)
Coastal Science & Engineering	2623.01.25		430		(430)	(430)
		38,620	748	-	37,873	<sup>43</sup> (748)

**City of Isle of Palms**  
**Island Wide Beach Monitoring- Minor Project**  
**2/28/2025**

Project 2618

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
Coastal Science & Engineering	10/31/2024	2618.10.24		3,909		(3,909)	(3,909)
Coastal Science & Engineering	12/31/2024	2618.12.24		110	-	(110)	(110)
Coastal Science & Engineering	1/31/2025	2618.01.25		375		(375)	(375)
					-	-	-
			15,310	10,460	-	4,850	(10,460)
<b>Total Project</b>			98,790	64,851	106,000	33,939	41,149

**City of Isle of Palms**  
**Major Offshore Dredging**  
**2/28/2025**  
**SCOPE D**      Project 2623

	Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
<b>Allowance for Cultural Resources Survey related Renourishment</b>	20,000			20,000	
			-	-	-
			-	-	-
	20,000	-	-	20,000	-
<b>Allowance for Offshore Borings related Renourishment</b>	200,000	-		200,000	-
Coastal Science & Engineering		107,500		(107,500)	(107,500)
				-	-
	200,000	107,500	-	92,500	(107,500)
<b>Total Project</b>	478,620	127,040	843,620	351,581	716,581



**City of Isle of Palms**  
**Shoal Management Project**  
**2/28/2025**  
**SCOPE A and SCOPE B**

Project 2589

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
<b>Planning related to next large scale off-shore project</b>					225,000	10,520	225,000
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23	10,520	2,100		(2,100)	(2,100)
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		2,500		(2,500)	(2,500)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	4/30/2024	Invoice 2589.04.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		1,530		(1,530)	(1,530)
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		300		(300)	(300)
Coastal Science & Engineering	8/31/2024	Invoice 2589.08.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24		1,000		(1,000)	(1,000)
			-	-	-	-	-
			10,520	10,430	225,000	90	214,570
<b>Engineering related to next large scale off-shore project</b>						12,680	-
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23	12,680	1,550		(1,550)	(1,550)
Coastal Science & Engineering	1/31/2024	Invoice 2589.01.24		630	-	(630)	(630)
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		4,525		(4,525)	(4,525)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		1,500		(1,500)	(1,500)
Coastal Science & Engineering	4/30/2024	Invoice 2589.04.24		4,070		(4,070)	(4,070)
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		400		(400)	(400)
						-	-
			12,680	12,675	-	5	(12,675)
<b>Permitting related to next large scale off-shore project</b>						41,480	-
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23	41,480	2,375	-	(2,375)	(2,375)
Coastal Science & Engineering	1/31/2024	Invoice 2589.01.24		6,200		(6,200)	(6,200)
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		2,250		(2,250)	(2,250)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		8,500		(8,500)	(8,500)
Coastal Science & Engineering	4/30/2024	Invoice 2589.04.24		7,720		(7,720)	(7,720)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		6,225		(6,225)	(6,225)
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		1,350		(1,350)	(1,350)
Coastal Science & Engineering	7/31/2024	Invoice 2589.07.24		1,100		(1,100)	(1,100)
Coastal Science & Engineering	8/31/2024	Invoice 2589.08.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24		1,500		(1,500)	(1,500)
Coastal Science & Engineering	10/31/2024	Invoice 2589.10.24		3,260		(3,260)	(3,260)
						-	-
			41,480	41,480	-	-	(41,480)
<b>Direct Expenses related to next large scale off-shore project</b>						4,855	-
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23	4,855	400	-	(400)	(400)
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		800		(800)	(800)

**City of Isle of Palms**  
**Shoal Management Project**  
**2/28/2025**  
**SCOPE A and SCOPE B**

Project 2589

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		345		(345)	(345)
Coastal Science & Engineering	4/30/2024	Invoice 2589.04.24		810		(810)	(810)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		807		(807)	(807)
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		103		(103)	(103)
Coastal Science & Engineering	7/31/2024	Invoice 2589.07.24		660		(660)	(660)
Coastal Science & Engineering	8/31/2024	Invoice 2589.08.24		50		(50)	(50)
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24		125		(125)	(125)
Coastal Science & Engineering	10/31/2024	Invoice 2589.10.24		165		(165)	(165)
Coastal Science & Engineering	1/31/2025	Invoice 2589.01.25		500		(500)	(500)
			4,855	4,765	-	91	(4,765)
<b>Stage 2 - Onshore Migration</b>							
<b>Project Planning, Liaison, Communication</b>			12,000			12,000	
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		2,500		(2,500)	(2,500)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	11/30/2024	Invoice 2589.11.24		2,190		(2,190)	(2,190)
Coastal Science & Engineering	10/31/2024	Invoice 2589.10.24		2,000		(2,000)	(2,000)
Coastal Science & Engineering	12/31/2024	Invoice 2589.12.24		500		(500)	(500)
Coastal Science & Engineering	1/31/2025	Invoice 2589.01.25		500		(500)	(500)
			-	-	-	-	-
			12,000	9,690	-	2,310	(9,690)
<b>Field Data Collection</b>			38,600			38,600	
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		5,000		(5,000)	(5,000)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		7,150		(7,150)	(7,150)
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		3,150		(3,150)	(3,150)
Coastal Science & Engineering	8/31/2024	Invoice 2589.08.24		7,000		(7,000)	(7,000)
Coastal Science & Engineering	10/31/2024	Invoice 2589.10.24		6,600		(6,600)	(6,600)
Coastal Science & Engineering	11/30/2024	Invoice 2589.11.24		1,200		(1,200)	(1,200)
			-	-	-	-	-
			38,600	31,100	-	7,500	(31,100)
<b>Engineering</b>			25,720			25,720	
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		2,550		(2,550)	(2,550)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		1,000		(1,000)	(1,000)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		4,200		(4,200)	(4,200)
Coastal Science & Engineering	7/31/2024	Invoice 2589.07.24		1,600		(1,600)	(1,600)
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24	-	3,670	-	(3,670.00)	(3,670.00)

**City of Isle of Palms  
Shoal Management Project  
2/28/2025  
SCOPE A and SCOPE B**

Project 2589

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
Coastal Science & Engineering	10/31/2024	Invoice 2589.10.24		1,000		(1,000.00)	(1,000.00)
Coastal Science & Engineering	11/30/2024	Invoice 2589.11.24		1,000		(1,000.00)	(1,000.00)
Coastal Science & Engineering	12/31/2024	Invoice 2589.12.24		1,000		(1,000.00)	(1,000.00)
Coastal Science & Engineering	1/31/2025	Invoice 2589.01.25		1,000		(1,000.00)	(1,000.00)
			25,720	17,020	-	8,700	(17,020)
<b>Direct Expense</b>			92,576			92,576	
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		303		(303)	(303)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		3,500		(3,500)	(3,500)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24	-	51,164	-	(51,164)	(51,164)
Coastal Science & Engineering	7/31/2024	Invoice 2589.07.24		100		(100)	(100)
Coastal Science & Engineering	8/31/2024	Invoice 2589.08.24		2,850		(2,850)	(2,850)
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24		234		(234)	(234)
Coastal Science & Engineering	10/31/2024	Invoice 2589.10.24		480		(480)	(480)
Coastal Science & Engineering	11/30/2024	Invoice 2589.11.24		220		(220)	(220)
Coastal Science & Engineering	12/31/2024	Invoice 2589.12.24		175		(175)	(175)
Coastal Science & Engineering	1/31/2025	Invoice 2589.01.25		75		(75)	(75)
			92,576	59,101	-	33,475	(59,101)
<b>Allowances</b>			45,000			45,000	
			-	-	-	-	-
			45,000	-	-	45,000	-
			283,430	186,260	225,000	97,171	38,740

**Total Project**

Stage 1 is the emergence of an offshore shoal and its release from the ebb-tidal delta.  
Stage 2 is onshore migration and initial attachment of the shoal and accompanying response of the beach.

City of Isle of Palms  
**USACE**  
**2/28/2025**  
**SCOPE C Project 2689 C**

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
					400,000		400,000
<b>Project Planning related USACE Coordination</b>						13,300	
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23	13,300	3,590		(3,590)	(3,590)
Coastal Science & Engineering	1/31/2024	Invoice 2589.01.24		1,330		(1,330)	(1,330)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		1,500		(1,500)	(1,500)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		2,600		(2,600)	(2,600)
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		1,200		(1,200)	(1,200)
Coastal Science & Engineering	7/31/2024	Invoice 2589.07.24		665		(665)	(665)
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24	-	700	-	(700.00)	(700.00)
Coastal Science & Engineering	12/31/2024	Invoice 2589.12.24		500		(500.00)	(500.00)
			<b>13,300</b>	<b>12,085</b>	<b>-</b>	<b>(12,085)</b>	<b>(12,085)</b>
<b>Field Data related USACE Coordination</b>						6,400	
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23	6,400	1,000		(1,000)	(1,000)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		1,055	-	(1,055)	(1,055)
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		710		(710)	(710)
Coastal Science & Engineering	7/31/2024	Invoice 2589.07.24		608		(608)	(608)
			<b>6,400</b>	<b>3,373</b>	<b>-</b>	<b>(3,373)</b>	<b>(3,373)</b>
<b>Engineering related USACE Coordination</b>						9,500	-
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23	9,500	1,425	-	(1,425)	(1,425)
Coastal Science & Engineering	1/31/2024	Invoice 2589.01.24		1,425		(1,425)	(1,425)
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24		3,740		(3,740)	(3,740)
Coastal Science & Engineering	3/31/2024	Invoice 2589.03.24		2,890		(2,890)	(2,890)
			<b>9,500</b>	<b>9,480</b>	<b>-</b>	<b>20</b>	<b>(9,480)</b>
<b>Bid Coordination related USACE Coordination</b>						3,800	
Coastal Science & Engineering	4/30/2024	Invoice 2589.04.24	3,800	950	-	(950)	(950)
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		950		(950)	(950)

City of Isle of Palms  
**USACE**  
**2/28/2025**  
**SCOPE C Project 2689 C**

			Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget	
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		1,200		(1,200)	(1,200)	
Coastal Science & Engineering	12/31/2024	Invoice 2589.12.24		500		(500)	(500)	
			3,800	3,600	-	700	(3,100)	
<b>Construction related USACE Coordination</b>							34,720	
Coastal Science & Engineering	2/29/2024	Invoice 2589.02.24	34,720	1,000	-	(1,000)	(1,000)	
Coastal Science & Engineering	4/30/2024	Invoice 2589.04.24		1,000		(1,000)	(1,000)	
Coastal Science & Engineering	8/31/2024	Invoice 2589.08.24		600		(600)	(600)	
Coastal Science & Engineering	11/30/2024	Invoice 2589.11.24		1,000		(1,000)	(1,000)	
Coastal Science & Engineering	12/31/2024	Invoice 2589.12.24		1,000	-	(1,000)	(1,000)	
			34,720	4,600	-	30,120	(4,600)	
<b>Direct Expenses related USACE Coordination</b>							17,350	-
			17,350	-		-	-	
Coastal Science & Engineering	12/31/2023	Invoice 2589-12.23				-	-	
Coastal Science & Engineering	4/30/2024	Invoice 2589-04.24		50		(50)	(50)	
Coastal Science & Engineering	5/31/2024	Invoice 2589.05.24		310		(310)	(310)	
Coastal Science & Engineering	6/30/2024	Invoice 2589.06.24		156		(156)	(156)	
Coastal Science & Engineering	9/30/2024	Invoice 2589.09.24		35		(35)	(35)	
Coastal Science & Engineering	12/31/2024	Invoice 2589.12.24		100		(100)	(100)	
			17,350	651	-	16,700	(651)	
<b>Total Project</b>			85,070	33,789	400,000	32,082	366,712	

**City of Isle of Palms  
Marina Dredging  
2/28/2025**

	<b>Date</b>	<b>Invoice Number</b>	<b>Contract Projections</b>	<b>Actuals</b>	<b>Approved by Council FY24</b>	<b>Remaining on Contract</b>	<b>Remaining on Budget</b>
<b>ATM - Design &amp; Permitting</b>					<b>104,500</b>	<b>104,500</b>	<b>104,500</b>
<b>ATM-Local Engagement and Coordination</b>	7/13/2023		3,500				
	9/7/2023	1984		3,500		(3,500)	(3,500)
<b>ATM-Dredge Disposal Alternative Analysis</b>	7/13/2023		13,500			-	
	10/27/2023	1943		1,350		(1,350)	(1,350)
	9/7/2023	1984		1,350		(1,350)	(1,350)
	10/10/2023	1927		10,800		(10,800)	(10,800)
<b>ATM-Preliminary Design &amp; Sediment Testing</b>	7/13/2023		27,500			-	
	9/26/2024	2970		2,000		(2,000)	(2,000)
	11/15/2024	3138		1,500		(1,500)	(1,500)
<b>ATM-Regulatory Permit Application Developmen</b>	7/13/2023		9,500			-	-
	9/26/2024	2970		1,298		(1,298)	(1,298)
	11/15/2024	3138		8,202		(8,202)	(8,202)
<b>ATM-Regulatory Permit Application Coordinati</b>	7/13/2023		5,000			-	-
	2/24/2025	3486		2,033		(2,033)	(2,033)
<b>ATM-Bid Package Development</b>	7/13/2023		18,000			-	-
<b>ATM-Bidding Support</b>	7/13/2023		12,500			-	-
<b>ATM-Construction Adminstration</b>	7/13/2023		15,000			-	-
	2/24/2025	3486		36		(36)	(36)
			104,500	32,069	104,500	72,431	72,431
<b>Total Project</b>			104,500	32,069	104,500	72,431	72,431

Note:  
 FY24 budget includes a rebudget of \$50K for permitting of future dredging project.  
 Permits can take up to 2 years to secure.  
 Applied Technology and Management

City of Isle of Palms  
**Palm Blvd Between 38th and 41st Avenue Drainage**  
**Project 27670.0012**  
**2/28/2025**

	<u>Date</u>	<u>Invoice Number</u>	<u>Contract Projections</u>	<u>Actuals</u>	<u>Approved by Council</u>	<u>Remaining on Contract</u>	<u>Remaining on Budget</u>
<b>Thomas &amp; Hutton - Design &amp; Permitting</b>			122,400		<b>250,000</b>	<b>122,400</b>	<b>250,000</b>
Thomas & Hutton	6/10/2024	Invoice 259480		7,934		(7,934)	(7,934)
Thomas & Hutton	7/10/2024	Invoice 260519		4,735		(4,735.00)	(4,735)
Thomas & Hutton	8/14/2024	Invoice 262267		10,276		(10,276.00)	(10,276)
Thomas & Hutton	9/17/2024	Invoice 264392		17,825		(17,825.00)	(17,825)
Thomas & Hutton	10/4/2024	Invoice 265138		10,495		(10,495.00)	(10,495)
Thomas & Hutton	11/7/2024	Invoice 267202		10,085		(10,085.00)	(10,085)
Thomas & Hutton	12/17/2024	Invoice 269307		9,275		(9,275.00)	(9,275)
Thomas & Hutton	12/31/2024	Invoice 270515		4,698		(4,698.13)	(4,698.13)
Thomas & Hutton	2/10/2025	Invoice 272077		16,240		(16,240.00)	(16,240.00)
			<u>122,400</u>	<u>91,563</u>	<u>250,000</u>	<u>30,837</u>	<u>158,437</u>
<b>Total Project</b>			<u>122,400</u>	<u>91,563</u>	<u>250,000</u>	<u>30,837</u>	<u>158,437</u>

Note:

Funded by 50% of DHEC Stormwater Grant received in FY24 \$500K and \$1.25M State Grant received in FY25.  
 \$1.850M Budgeted in FY26

**City of Isle of Palms**  
**Waterway Boulevard Multi-Use Path Elevation Project**  
**Project 27670.0010 PO-19-1436**  
**2/28/2025**

	Date	Invoice Number	Contract Projections	Actuals	Approved by Council	Remaining on Contract	Remaining on Budget
<b>Thomas &amp; Hutton - Design &amp; Permitting</b>			238,200		<b>1,500,000</b>	<b>238,200.00</b>	<b>1,500,000</b>
Thomas & Hutton	1/21/2024	Invoice 0251310		20,462		(20,462.40)	(20,462)
Thomas & Hutton	2/9/2024	Invoice 0252881		22,372		(22,372.10)	(22,372)
Thomas & Hutton	3/12/2024	Invoice 255056		3,575		(3,575.00)	(3,575)
Thomas & Hutton	4/15/2024	Invoice 256638		27,138		(27,137.92)	(27,138)
Thomas & Hutton	5/8/2024	Invoice 257498		10,092		(10,092.18)	(10,092)
Thomas & Hutton	6/10/2024	Invoice 259489		1,135		(1,135.00)	(1,135)
Thomas & Hutton	6/10/2024	Invoice 260502		7,105		(7,104.50)	(7,105)
Thomas & Hutton	8/20/2024	Invoice 262246		2,613		(2,612.50)	(2,613)
Thomas & Hutton	9/17/2024	Invoice 264384		22,300		(22,300.00)	(22,300)
Thomas & Hutton	11/7/2024	Invoice 267191		33,545		(33,545.26)	(33,545)
Thomas & Hutton	12/17/2024	Invoice 269292		9,419		(9,419.00)	(9,419)
Thomas & Hutton	12/31/2024	Invoice 270524		6,935		(6,935.00)	(6,935)
Thomas & Hutton	2/10/2025	Invoice 272067		12,715		(12,715.00)	(12,715)
			-	-	-	-	-
			238,200	179,406	1,500,000	58,794	1,320,594
<b>Total Project</b>			238,200	179,406	1,500,000	58,794	1,320,594

**Note:**

**\$1.1M ( \$157K Design & Permitting- Capital Project Fund. City seeking \$980K Grant from FEMA Hazard Mitigation Grant for construction)**  
**\$500K - 50% of SC State Budget grant for stormwater awarded in FY24**



<b>FORD OF SPARTANBURG</b>			
<b>David Vetter 864.585.3600</b>			
<b>2025 F150 PICK UP</b>			
<b>Contract #: 4400035159</b>			
<b>Standard Equipment Included:</b>			
<b>Select Engine Below</b>		Power Steering	
Automatic Transmission		Power Brakes	
A/C		Cruise Control	
AM/ FM Radio		Vinyl 40/20/40 Front Bench Seat	
<b>Select Model Below</b>		Heavy Duty Vinyl Floor	
Power Windows and Door Locks		Trailer Tow Package	
Reverse Sensing System		SYNC 4	
<b>ADDITIONAL INCLUDED FACTORY OPTIONS:</b>			
AS	Vinyl 40/20/40 Front Bench Seat		
101A	101A Standard XL Trim Package		
X1L	Super Cab 4x4 (Short Bed - 6.5') 145" Wheelbase		
99P	2.7L V6 EcoBoost Engine		
413	Skid Plates		<b>Required by Contract on 4x4 Mo</b>
XXX	Limited Slip Rear Axle		<b>Required by Contract on 4x4 Mo</b>
18B	Factory Installed Black Platform Running Boards		<b>Required by Contract Due to Ent</b>
<b>SC STATE CONTRACT PRICE:</b>			<b>\$42,944.00</b>
IMF-Sales Tax			\$500.00
<b>TOTAL SC STATE CONTRACT PRICE:</b>			<b>\$43,444.00</b>
<b>ADDITIONAL AVAILABLE FACTORY INSTALLED OPTIONS:</b>			
995	5.0L V8 Engine		
998	3.5L EcoBoost Engine		
T7C	LT245/75R17 All-Season Tires (Not Available on Regular Cab 6.5' Bed Models)		
53T	Tow/Haul Package - <b>Available on Extended/Super Cab and Crew Cab Models Only</b>		
67T	Trailer Brake Controller - <b>Only Available w/ the 2.7L EcoBoost Engine - Included in 53T Above</b>		
91P	8-Way Power Driver's Seat		
85H	Back Up Alarm (Requires Fog Lamps)		
942	Daytime Running Lights		
41H	Engine Block Heater		
924	Privacy Glass		
<b>REQUIRED BY CONTRACT - CAN BE DELETED FOR DISCOUNT AT CUSTOMER'S CHOICE:</b>			
413	Skid Plates		
XXX	Limited Slip Rear Axle		
18B	Factory Installed Black Platform Running Boards		
<b>Seating Options - All Models:</b>			
CS	Cloth 40/20/40 Front Bench Seat		
<b>Available Aftermarket Installed Options:</b>			
Bedliner (Drop-In)			\$289.00
Bedliner (Spray-In)			\$525.00
Bed Mat			\$275.00
Bed Slide CargoGlide			Call for Availability and Quote
Fiberglass Camper Top			Call for Availability and Quote
Fiberglass Tonneau Cover			Call for Availability and Quote
Tri-Fold Hard Lockable Bed Cover (Tonneau Cover)			\$950.00
Warn VR Evo 12,000lb Winch & Black Grill Guard			\$2,595.00
Brush Guard for Warn Winch			\$425.00
2" Ball, Receiver Tube and Pin for Frame Mounted Hitch			\$45.00
3 - Ball Hitch			\$125.00
Combo Ball and Pintle Hook w/ 2" Ball			<sup>53</sup> \$265.00
Combo Ball and Pintle Hook w/ 2 5/16" Ball			\$265.00

Adrian Single Lid Cross Box			\$995.00
Adrian Single Lid Cross Box and 2 Each Side Tool Boxes			\$2,295.00
4-Corner Flashing Strobe System (LED Lights)			\$895.00
LED Mini-Light Bar (Amber/Clear) Roof Mounted w/ 4-Corner LED Strobes			\$1,195.00
FMVSS Safety Kit (Fire Ext., Triange and First Aid Kit)			\$95.00

# QUOTE



Bill To: CITY OF ISLE OF PALMS  
 PO BOX 508  
 ISLE OF PALMS SC 29451

Ship To: CITY OF ISLE OF PALMS  
 1303 PALM BLVD.  
 ISLE OF PALMS SC 29451

INVOICE NUMBER	ORDER NUMBER	CUSTOMER	PO NUMBER	TERMS	SALESPERSON
02/27/25	179065	189	CARTS	NET 10 DAYS	PTS
	02/05/25				
UNITS	U/M	ITEM DESCRIPTION	DISC	UNIT PRICE	AMOUNT
1100	EA	***** QUOTATION ***** 79296 TOTER 96 GALLON EVR II CART		59.250	65,175.000
		Subtotal			65,175.00
		FREIGHT FROM FACTORY - SC LOC			3,457.20
		SALES TAX			6,176.89
		TAX #:			
		S.C. SALES AND USE TAX (6%)		4,117.93	
		ISLE OF PALMS		686.32	
		CHARLESTON (TT)		686.32	
		CHARLESTON SCHOOL		686.32	
		Quote Total			74,809.09

THIS IS AN ESTIMATE BUT SHOULD NOT RUN MORE THAN 15% OF THE TOTAL VALUE SHOWN.

## Residential Cart Program

# *Proposal Summary & Agreement*

*Prepared For*



*Presented to*

**Mr. Robert Asero**  
**Assistant Director of Public Works**  
Isle of Palms, SC  
1303 Palm Boulevard  
Post Office Drawer 508  
Isle of Palms, SC 29451

September 10, 2024

***Isle of Palms, SC – Proposal for Waste Services***

September 10, 2024

**Mr. Robert Asero**  
**Assistant Director of Public Works**  
Isle of Palms, SC  
1303 Palm Boulevard  
Post Office Drawer 508  
Isle of Palms, SC 29451

Re: City of Isle of Palms, SC Container Services

Dear Mr. Asero:

Please find included herein for your review and consideration our *Proposal Summary & Agreement* and additional details surrounding waste services for the upcoming Isle of Palms, SC project.

Please phone or write with any comments or questions or if anything contained herein needs further clarification. Thank you again, Robert, for your support and confidence in our services. We're very grateful for the opportunity and are excited to potentially work with you and your team to provide a successful project together.

Respectfully Submitted,



Mark Merhab  
Vice President – General Manager

## PROPOSAL SUMMARY & AGREEMENT

### *Container Assembly and Delivery Program Isle of Palms, SC*

#### *Introduction*

As part of its waste collection services, the City of Isle of Palms, SC (“IOP”) needs unloading, assembly, and delivery of approximately 1,500 containers throughout homes within the City of Isle of Palms, SC. New containers will be comprised of 96-gallon Toter EVR II Universal/Nestable trash carts with pal nut wheels. This has prompted the need for certain waste services, as outlined below. ContainerPros, LLC (“ContainerPros” or “CP”) provides these professional waste services.

#### *Scope*

##### ◆ Residential Cart Receiving, Assembly, and Delivery

ContainerPros will provide crews and equipment to receive approximately 1,500 carts; carts will be unloaded and staged.

- ContainerPros will provide IOP with a copy of all BOLs and a totals spreadsheet detailing all carts received.

Approximately 1,500 carts will be assembled and delivered to homes over a period of approximately one (1) week beginning October 2024. Cart deliveries will be concentrated in a designated area of the city, with each home within that area receiving a trash cart. Carts will be delivered curbside. Carts leftover at the project’s end, if any, will remain unassembled and stacked for storage at the staging yard. A day rate for ancillary services such as work orders, hot tickets, and cart transporting has been provided should IOP have a need for services outside of this project’s main scope.

IOP will provide a suitable work area(s) for staging (large and secure area) within the service area, that will adequately store the cart order during the project timeframe. The staging yard will be located at either 1303 Palm Blvd, Isle of Palms, SC 29451 or 1116 Pavilion Dr., Isle of Palms, SC 29451 (Pavilion Dr. Municipal Lot B). If the staging yard is not leveled evenly or within the city limits, additional charges may apply.

Distribution schedule is based on Monday through Saturday, excluding Holidays, until all deliveries are completed. On-street operating window hours will be limited from 7AM to 7PM unless otherwise approved by IOP. Yard operating window hours will be limited from 6AM to 7PM unless otherwise approved by IOP.

IOP will provide copies of concise delivery/route maps, which must be provided at least two weeks prior to the project start up. These maps must include the precise delivery area(s). Copies of concise household delivery address lists will also be provided in .xls format and contain:

- Street Number
- Street Name
- Unit Number, if applicable
- City, State, and Zip Code
- Route number
- Service Day
- Gate Codes
- Cart sizes and types and quantities per address listed
- Sequencing of all stops, if available
- Driver Notes, if available

If an account is NOT on the master list provided, CP crews will NOT drop carts, unless directed otherwise by IOP.

IOP will provide monitoring services to observe and verify distribution of the carts and also to respond to inquiries from ContainerPros and the public.

ContainerPros will disseminate detailed daily results and reporting throughout the deployment, and a final report at the project's end, showing the total number and sizes of carts delivered at each account, as well as exceptions, including vacancies, not-outs, and customer refusals, if any.

ContainerPros IS NOT responsible for any missed deliveries caused by anything outside its control, including but not limited to incorrect mapping, incorrect or incomplete delivery lists or delivery locations not clearly marked with site addresses or lack of inventory.

### ***Additional Requirements, Terms and Conditions***

All work will be performed within the City of Isle of Palms, SC limits.

ContainerPros may, at its own expense, use any employees or subcontractors as it deems necessary to perform the services required by this Agreement. IOP may not control, direct, or supervise ContainerPros' employees or subcontractors in the performance of those services.

Neither this Agreement nor any duties or obligations under this Agreement may be assigned by either party without the prior written consent of the other.

This Agreement supersedes any and all agreements, either oral or written, between the parties hereto with respect to the rendering of services by ContainerPros and contains all of the covenants and agreements between the parties with respect to the rendering of such services in any manner whatsoever.

Each party to this Agreement acknowledges that no representations, inducements, promises or agreements, orally or otherwise, have been made by any party, or anyone acting on behalf of any party which is not embodied herein, and that no other agreement, statement or promise not contained in this Agreement shall be valid or binding. Any modification of this Agreement will be effective only if it is in writing signed by the party to be charged.

If any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will nevertheless continue in full force without being impaired or invalidated in any way.

If any action at law or in equity is brought to enforce or interpret the provisions of this Agreement, the prevailing party will be entitled to reasonable attorneys' fees and costs.

This Agreement will be governed by and construed in accordance with the laws of the State of North Carolina.

This Agreement can be signed in counterpart and by electronic and/or facsimile signature(s).

Delay charges may be billed for additional delivery days and/or additional labor needed due to lack of inventory or anything outside of bid spec including but not limited to delays caused by the hauler and unsafe conditions. Any delay charges incurred must be presented, in writing, within five (5) working days of discovery with detail of the cause(s) and costs incurred.



## Financial Framework

### Unit & Estimated Total Costs

Service	Unit & Total Estimated Costs		
	Estimated # of Units	Unit Cost	Projected Costs
Cart Unloading Per Cart	1,500	\$1.09	\$1,635.00
Assembly & Delivery with Serial Number Recording	1,500	\$8.26	\$12,390.00
Literature Attachment Per Cart (Optional, actual quantities would be billed)	1	\$0.22	\$0.22
Day rate per 2-man crew for ancillary services such as work orders, tickets, cart transport, etc. (actual number of crew days utilized would be billed)	1	\$1,287.00	\$1,287.00
Net Estimated Total Cost			<u>\$14,025.00</u>

### Terms

Services will be invoiced and paid as follows:

Amounts owed will be invoiced monthly and due within 45 days.

If in agreement with the specifications, terms and conditions described herein, please endorse here and email to [jgray@wastequip.com](mailto:jgray@wastequip.com):

**For the City of Isle of Palms, SC:**

Authorization: \_\_\_\_\_

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

Name: \_\_\_\_\_

Title: \_\_\_\_\_

**For ContainerPros:**

Authorization: 

Date: September 10, 2024

Name: **Mark Merhab**

Title: Vice President – General Manager

*Disclaimer: ContainerPros has taken information provided by IOP and/or their employees to provide the above prices. If there are any significant adjustments in the scope that cause a change in the estimated production (more or less than 3%), IOP will notify ContainerPros either via email or facsimile of the issues within 1 day of discovery. The above price may no longer be valid, and a pricing alignment meeting must be held within 48 hours of the notification.*

**Confidential & Proprietary – Unlawful to disseminate without the express written permission of ContainerPros, LLC  
All rights reserved.**

**City of Isle of Palms, South Carolina  
Official Sealed Bid Opening  
RFB 2025-02 Palm Trimming/Pruning Project  
Council Chambers, City Hall  
1207 Palm Boulevard, Isle of Palms**

Present: Matt Simms, Zoning Administrator

Zoning Administrator announced the sealed bid opening of the Request for Bids 2025-02 Palm Trimming/Pruning. The RFB was advertised in accordance with the City's Procurement Code.

Bids:

1. Planet Green Tree Service - \$28,080
2. Robert's Stump Grinding and Tree Service - \$46,800
3. Yellowstone Landscape - \$38,750

Administrator Fragoso stated that the bids will be evaluated for accuracy and compliance with the specifications defined in the RFB. A recommendation for award will be made to City Council on Tuesday, March, 11<sup>th</sup>, 2025.

**BID FORM**

BID OF: Planet Green Landscaping dba Planet Green Tree Service  
(Contractor)

BID TO: The City of Isle of Palms  
(Owner)

PROJECT NAME: Palm Trimming/Pruning Project

PROJECT NUMBER: RFB 2025-02

BID DATE: 02/27/2025

**BASE BID AGREEMENT**

The undersigned, having examined all the Bidding Documents, including all Addendum(a) as follows:

shall execute the entire Work in the Bidding Documents described as the Base Bid for the lump sum of:

\$28,080  
Dollars

(\$ 28,080 ) which sum is hereafter called the BASE BID.

ITEMIZED COSTS (sum of each item should total BASE BID amount)

1. Pruning of 1,040 Sabal Palms along Palm Boulevard and the Isle of Palms  
Recreation Center  
\$28,080 Cost
  
2. Removal of debris, brush, and clippings  
included Cost

BASE BID \$28,080



**Planet Green Tree Service**  
16 Lombardi Lane  
Hanahan, SC 29410

Planet Green Landscaping  
 16 Lombardi Ln  
 Hanahan, SC 29410  
 (843) 300-9476  
 office@planetgreentreeservice.com



# Estimate

**ADDRESS**

Matt Simms  
 City of Isle of Palms  
 1207 Palm Blvd  
 IOP, SC 29451

**SHIP TO**

Matt Simms  
 City of Isle of Palms  
 1207 Palm Blvd  
 IOP, SC 29451

**ESTIMATE #** 12586

**DATE** 02/27/2025

**PROJECT MANAGER**

Bryan Coker (843) 872-7160 bryan@planetgreentreeservice.com

ACTIVITY	QTY	RATE	AMOUNT
RFB 2025-02 <b>Tree Service:Palm Tree</b> Remove seed pods, dead/dying fronds, and loose boots. *Prune to ANSI A300 Part 1 Pruning Standards	1,040	27.00	28,080.00

Approximately 1,040 Sabal Palms located in the following areas:

- Palm Boulevard
- Ocean Boulevard from 10th to 14th
- Connector side of the Public Works Building (1303 Palm Boulevard)
- In front of the "Welcome to Isle of Palms" sign at Breach Inlet
- Isle of Palms Recreation Center (24 28th Avenue)

Palm pruning debris will be removed daily

ISA Certified Arborist will be onsite or available at all times

Workers are trained in accordance with ANSIL Z133 safety guidelines as required by OSHA

Responsible for traffic control and repeat visits due to parked vehicles and pedestrian traffic

SUBTOTAL	28,080.00
TAX	0.00
<b>TOTAL</b>	<b>\$28,080.00</b>

Accepted By

Accepted Date

Stacy Coker, ISA Certified Arborist  
 SO-11256A



**16 Lombardi Ln  
Hanahan, SC 29410**

**office@planetgreentreeservice.com**

February 27, 2025

Re: RFB 2025-02

IOP Palm Trimming/Pruning Project

Over the past three years, we have pruned over 24,000 palm trees throughout the Tri-County area. There are numerous additional properties, particularly on the islands, beyond those mentioned.

We prune the palm trees in accordance with ANSI A300 standards, utilizing lifts and small buckets, ensuring all debris is cleared away, and leaving the properties in better condition than we found them. Customer satisfaction remains our top priority.

Marsh Harbor – 445  
Wild Dunes Resort – 771  
Nexton – 263  
Del Webb Cane Bay - 247  
Shipwatch - 234

Brysan Coker (843) 872-7160

Stacy Coker, ISA Certified Arborist  
SO-11256A



## Capital Projects Update - March 2025

Project	Funding Source	Status
<b>Drainage</b>		
Waterway Boulevard Multi-Use Path Elevation Project	\$2.6M ( \$157K Design & Permitting, \$600k on golf course, \$2M future pathway - Capital Projects Fund). City awarded \$990K Grant from FEMA Hazard Mitigation Grant for construction)	Staff has learned that golf course ownership has concerns about the project and does not want to participate. Staff and engineer are working directly with the contractor to determine if the project can be done without working through the golf course contract. City attorney is working with the owners' attorney to find solutions that would appease concerns. If solutions can be developed, additional work will be necessary to create easements for long term maintenance of the flood controls.
Phase 4 Drainage- Palm Boulevard b/w 38th and 41st Avenue	Estimated \$2M. Capital Projects Fund and FY25 State budget allocation	Design and permitting in process. Permits submitted and under review and expected on hand projected by end of February. Construction anticipated for fall of 2025.
Sea Level Rise Adaptation Plan	\$20K - Beach Preservation Fund	The revised plan to be presented to the City Council at the March workshop.
<b>IOP Marina</b>		
IOP Marina Public Dock & Greenspace	\$1.7M ARPA	Dock completed and ribbon cutting was held February 7th. Parking engineer and marina tenants will be invited to future workshop to discuss potential parking layouts for implementation in upcoming winter.
Marina Dredging - Design and Permitting	\$1.5M FY23 State Budget Allocation	Federal permit applications have been submitted and out for public comment. Will respond to any comments that are received.
<b>Beach Maintenance &amp; Access Improvements</b>		
IOP County Park Emergency Vehicle Access	\$200K Beach Preservation Fund (City requesting \$250K from FY25	Truluck construction, city staff and county staff have been coordinating construction. Concrete work is complete, paver work is scheduled for week of March 10th. Fencing is delayed, but all other work anticipated to be complete before the end of March.

Project	Funding Source	Status
Beach Access Path Improvements	State Budget)  \$250K Beach Preservation Fund + \$500K FY24 State Budget Allocation. Staff also seeking Greenbelt Program funding.	Construction of ADA boardwalks at 36th 46th and 52nd Avenues complete. Construction of boardwalk at 26A will be complete very soon.
Beach Maintenance & Restoration	Beach Preservation Fund \$1.5M Breach Inlet emergency Scraping + trucking + sandbags (Offset by \$850K grant from SCPRT)  \$300K + \$200K Beachwood East sandbags  \$365K Engineering, permitting shoal management projects and large offshore projects	Emergency beach restoration work is ongoing as needed. The City is expecting to be able to salvage bags and move them from the Breach Inlet end to the Beachwood East area as the Breach Inlet end becomes protected by the USACE project. the week of 2/10/25.  Staff and CSE have received calls indicating that the issuance of the Wild Dunes shoal management project permit is imminent. CSE and staff are working on issuing an RFB for this work and anticipating work could begin in April.

Project	Funding Source	Status
	\$400K estimated cost of additional City work in conjunction w USACE project	Ahtna working on the Isle of Palms. They have completed initial work associated with dredging approximately 50,000CY of material to make the Intracoastal Waterway to become navigable. The contractor is moving operations back to the material stockpile areas. Sullivan's Island has agreed to allow the contractor to place the remaining 20,000CY of material allocated to them onto the Isle of Palms. After the remaining Sullivan's Island allocation is complete, the contractor will begin working on moving the material allocated to the Isle of Palms. The City's contractor will begin shifting material into a protective berm once sufficient material has been placed on the beach.
<b>Buildings &amp; Facilities</b>		
City Hall Renovation	\$1.250M Capital Projects + Muni ATAX	Trident and MPS presented to Public Services & Facilities on 9/10 additional options for City Hall relocation to Public Safety Building and Lot B, and respective cost estimates. Budget implications will be discussed during the FY26 budget process.
Undergrounding Power Lines	\$75K Muni ATAX (50/50 split w/ Dominion Energy)	Public Facilities Committee met with Dominion Energy 2/11/2025 to discuss the feasibility to fund an undergrounding master plan with NSSF.
SCDOT Palm Boulevard Bike, Pedestrian and Parking Enhancements	SCDOT Funded concept development. No funding identified/allocated for construction.	Concepts discussed w Public Safety Committee and City Council. Next steps include seeking public comment on the concepts developed.
21st Avenue Sidewalk Repair & Extension	\$260K Charleston County CTC Program	Charleston County approved additional funding for project at their October meeting. All permits are in hand. Bid solicitation planned for January or February, and construction to be completed by May 31st.

# Isle of Palm Walkability Study

Scope of Work: **Draft** 02/24/25

## Project Objectives

The goal of the Island Walkability Study includes, but is not limited to, evaluating existing bike and pedestrian infrastructure on the Isle of Palms to identify gaps and deficiencies that create safety, connectivity, and maintenance concerns.

The objectives of the Island Wide Walkability Study are as follows:

- Evaluate the existing bike and pedestrian infrastructure on the island.
- Identify gaps and deficiencies in the current infrastructure.
- Assess the safety and accessibility of existing routes for pedestrians and cyclists.
- Develop recommendations for infrastructure improvements to enhance walkability and bikeability.
- Consider the integration of sustainable and environmentally friendly solutions.
- Engage with stakeholders and gather input on desired improvements.

## Project Management and Administration

The BCD Council of Governments will customize implementation of the project with a management approach developed in concert with City Staff. The designated BCDCOG project manager will work with City Staff to determine a process and sources from which to gather background information for each element of the project, identify a schedule for completion, and integrate various work activities with available resources as identified in the budget.

The principal contact for the BCDCOG planning service team is Kathryn Basha, Planning Director. A team of COG staff including, but not limited to, a dedicated project manager, data and research specialists, environmental and transportation planners, and GIS planner will be assigned to conduct the activities outlined herein.

The City will provide feedback on draft deliverables and help organize public engagement activities.

### A: Project Schedule

The BCDCOG will develop a detailed project schedule that establishes start and end points for each project task; targets submittal dates for draft and final deliverables; and projected public meeting dates.

### B: Quarterly Reporting and Invoices

The BCDCOG will prepare quarterly progress reports that describe activities that have been completed in the preceding quarter; activities planned for the next quarter; project status relative to the schedule and budget; and any issues or concerns that affect the project schedule, budget, or technical tasks.

The BCDCOG will submit quarterly invoices and associated progress reports to the Town for review and processing payment.

## C: Kick-off Meeting & Field Visit

The BCDCOG project manager will schedule and conduct an island wide orientation tour for the project team and facilitate a project kick-off meeting designated City Staff

The purpose of the kick-off meeting will be to:

- Share feedback from the field tour.
- Provide a high-level outline of major deliverables.
- Discuss the schedule and public engagement process; and
- Address questions regarding City needs and responsibilities.

Within one (1) week of the kick-off meeting, the consultant will provide a final work plan and updated schedule.

## D: Ongoing Coordination

Throughout the study, there will be ongoing coordination by email, phone, and videoconferencing between the BCDCOG's project manager and City Staff on task preparations and draft deliverables.

## Task 1. Facility Assessment

The BCDCOG project team will evaluate and document its assessment of the existing bike and pedestrian infrastructure on the island including sidewalks, crosswalks, bike lanes and shared-use paths. The BCDCOG will prepare detailed base maps of existing infrastructure based on the field visit and aerial photography.

### Tasks 1.1 and 1.2: Existing Facilities Inventory

An inventory of existing and planned infrastructure will be created identifying major destinations (such as parks, recreation facilities, restaurants, grocery stores, fire stations, businesses, and beach access paths) and existing sidewalks, pathways, bikeways, crosswalks, signalized intersections, and pedestrian-oriented signals (i.e., pedestrian countdown signals, Rectangular Rapid Flashing Beacons, etc.). BCDCOG will create a GIS shapefile of this inventory based on aerial photography and field observations.

### Task 1.3: Ongoing + Proposed Projects

The BCDCOG will document ongoing and funded projects within or adjacent to the study boundaries in consultation with City staff. The projects will be documented in a GIS shapefile and illustrated on the inventory map by facility type. In addition, the BCDCOG will note any previously proposed projects that have not been funded.

## Task 1.4: Existing Facilities' Conditions/Assessments

The BCDCOG will work with the City to determine metrics to further assess the design and functionality of the existing infrastructure considering factors such as safety, connectivity, signage, visibility, lighting and maintenance. Each facility will be scored for individual metrics and infrastructure conditions will be coded within the attribute table of the GIS shapefile.

## Task 2. Stakeholder Input

The BCDCOG project team will coordinate with City staff to host a public workshop to gather resident and property owner input on safety hotspots, activity areas and desired improvements.

### Tasks 2.1 and 2.2: Coordinate workshop location and outreach

BCDCOG staff will coordinate with City staff to gather input from the public and identified stakeholders to confirm areas of activity, destinations, and safety hotspots where infrastructure improvements are needed. BCDCOG staff will support the City in advertising a public workshop to be scheduled based on City staff identification of place, date and time.

### Tasks 2.3/2.5: Prepare public workshop materials and facilitate conversations

The BCDCOG will prepare public workshop materials to include maps illustrating its initial assessment of existing facilities, safety considerations, proposed/funded improvements, and areas of high activity. BCDCOG will document ongoing and funded projects within or adjacent to the study boundaries in consultation with City staff. The projects will be documented in a GIS shapefile and illustrated on the inventory map by facility type. In addition, the BCDCOG will note any previously proposed projects that have not been funded.

### Task 2.4: Prepare and assist with dissemination of a public survey

The BCDCOG will work with the City to determine metrics to further assess the design and functionality of the existing infrastructure considering factors such as safety, connectivity, signage, visibility, lighting and maintenance. Each facility will be scored for individual metrics and infrastructure conditions will be coded within the attribute table of the GIS shapefile.

### Task 2.6: Stakeholder interviews

The BCDCOG will work with the City to determine metrics to further assess the design and functionality of the existing infrastructure considering factors such as safety, connectivity, signage, visibility, lighting and maintenance. Each facility will be scored for individual metrics and infrastructure conditions will be coded within the attribute table of the GIS shapefile.

## **Task 3. Recommendations**

Based on the findings from completion of Tasks 2 and 3, the BCDCOG will develop a set of recommendations for infrastructure improvements. These improvements will be prioritized based on the metrics identified in Task 1.4 and community input.

### **Tasks 3.1/3.2: Improvement Recommendations**

BCDCOG will develop an initial set of recommended improvements based on public input and compare these with the facilities' assessment conducted in Task 1 to establish a draft list of improvements to be assessed and prioritized.

### **Task 3.3: Assessment of Recommendations**

BCDCOG will score the recommended improvements compiled in Task 3.2 identified based on the metrics identified in Task 1.4 to determine which improvements best address concerns of safety and accessibility. Improvements will also be assessed for environmental impacts and the feasibility of construction (e.g. availability of right of way, etc.)

### **Task 3.4: Vet proposed improvements with City Staff**

The scored list of improvements will be shared with City staff to categorize as low, medium or high priorities.

### **Task 3.5/3.6/3.7: Prepare draft list of improvements for public consideration**

The BCDCOG will work with a local engineering firm to prepare cost estimates for the list of improvements identified and categorized in Tasks 3.1 to 3.4. Taking into account cost estimates, the final list will be prioritized for City consideration. If requested, the list will be shared with the public for additional input.

## **Task 4. Final Report**

BCDCOG will draft a final report of its findings and recommendations, along with suggested strategies for implementation of the prioritized list of improvements.

### **Tasks 4.1/4.2: Summary of process and findings, evaluations**

The draft report will summarize the technical and public processes used to identify and evaluate potential bicycle and pedestrian improvements that led to final recommendations.

The draft report will also provide detailed results of evaluations and cost estimates considered.

### **Task 4.3: Synopsis of available funding sources**

The BCDCOG will provide a synopsis of available funding sources that may be pursued to fund recommended improvements.

### Tasks 4.4/4.5: Presentation of Findings/Council workshop

The BCDCOG project manager will work with City staff to schedule a presentation of its findings and recommendations to City Council at a public meeting.

BCDCOG staff will coordinate one (1) workshop with City Council if requested to facilitate more in-depth discussion of the recommended improvements before delivering a final report.

DRAFT





STATE OF SOUTH CAROLINA ) MEMORANDUM OF  
COUNTY OF CHARLESTON ) AGREEMENT

**DRAFT 2/26/25**

WHEREAS, CHARLESTON COUNTY PARK AND RECREATION COMMISSION is the owner of ISLE OF PALMS COUNTY PARK, ONE 14<sup>TH</sup> AVE., ISLE OF PALMS, SOUTH CAROLINA 29451.

WHEREAS, THE CITY OF ISLE OF PALMS, SC (THE IOP) is in need of a beach access for emergency medical service responders; and

WHEREAS, CHARLESTON COUNTY PARK & RECREATION COMMISSION (THE CCPRC) is desirous of partnering with THE CITY OF ISLE OF PALMS, SC to provide a beach access for emergency medical service (EMS) responders

NOW THEREFORE, in consideration of the mutual covenants and benefits contained herein, the sufficiency of which is mutually acknowledged, the parties agree as follows:

THE IOP agrees to, at its own expense, construct an access for emergency vehicles from 14<sup>th</sup> Avenue through park property to the location of the existing fence gate at the dunes. That access will consist of Turfstone grid pavers for a portion of its length and concrete pavement for the remainder. IOP also agrees to, at its own expense, construct a Turfstone grid paved dedicated parking space for an emergency vehicle, a concrete paved walkway adjacent to the Turfstone paved access lane, and a concrete paved access within the right of way of 14<sup>th</sup> Ave. from the street curb to the right of way line. THE IOP also agrees to, at its own expense, include grading and drainage improvements as well as utility modifications associated with the emergency vehicle access. IOP agrees to construct all facilities in accordance with construction documents prepared by Davis & Floyd, Inc. dated September 26, 2024, except where otherwise approved or directed by CCPRC.

THE IOP agrees to, at its own expense, apply for, coordinate, and install an underground electric power service for a shore power hookup to be used by emergency vehicles at the aforementioned dedicated parking space, to operate an automatic gate at the access lane entrance, and for any other electric power needs specific to the EMS access. THE IOP agrees to designation as the owner of the power service and to pay all power usage and other fees.

THE IOP agrees to, at its own expense, install an automatic limited access gate at the entrance to the emergency access lane. THE IOP also agrees the installation will include modifications to the existing fence as needed, and that it will be responsible for management, maintenance, and repair of this gate. THE IOP agrees to share codes, devices, and information for operation of this gate with THE CCPRC, and to notify THE CCPRC of updates. THE IOP also agrees to, at its own expense, replace the existing gate at the dunes access with a new manual gate properly sized for emergency vehicles, making modifications to the fence as needed.

THE IOP agrees to, at its own expense, provide an as-built survey of the constructed emergency access, including new concrete and Turfstone pavements, new gates (including modifications to existing fences), electric service and other utilities (including modifications to existing utilities), topography (one foot contours and spot elevations at locations shown on the Grade Plan sheet of the construction documents), and new palmettos. Copies of the as-built survey to be provided in CAD and pdf file formats.

THE CCPRC agrees it will be responsible for management, maintenance, and repair of the new manual gate at the dunes access. THE CCPRC agrees to share codes and information for unlocking and operating this gate with THE IOP, and to notify THE IOP of updates.

THE CCPRC agrees to pay for replacement of the existing clatterbridge at the dunes crossing to the beach.

THE IOP agrees to, at its own expense, coordinate bidding and construction for replacement of the aforementioned existing clatterbridge, and to coordinate and pay for permitting and construction of any oceanward extension of that clatterbridge.

THE CCPRC agrees to maintain the clatterbridge, which entails managing sand to the proper depth over the clatterbridge timbers.

THE IOP agrees to coordinate and pay for repairs should the clatterbridge be damaged due to weather, fire, accidents, high tide, vandalism, structural failure, or other sources.

THE IOP agrees to coordinate and pay for installation of landscape improvements associated with the EMS access in accordance with the Planting Plan provided by CCPRC dated 11/20/24. If requested by the IOP, the CCPRC may assist with installation of plant material 1 gal container size and smaller.

THE CCPRC agrees to coordinate and pay for installation of landscape irrigation within the area of landscape improvements associated with the EMS access. THE CCPRC agrees to provide maintenance and repair of the irrigation installations.

THE CCPRC agrees to provide maintenance of EMS access hardscape and landscape installations within the Isle of Palms County Park property boundary. THE IOP agrees to maintain hardscape and sitework installations within the 14<sup>th</sup> Ave. right of way.

THE IOP agrees to coordinate and pay for repairs should the EMS access sitework, hardscape, or landscape installations be damaged due to weather, fire, accidents, high tide, vandalism, structural failure, or other sources.

THE IOP shall maintain property and liability insurance, and shall defend and be fully responsible for any and all claims, damages or injuries arising from the use of EMS access facilities, and attributable to the acts or omissions of its employees or agents. Furthermore, THE IOP agrees to fully indemnify and hold CCPRC harmless from any and all liability, action, claims, and damage of every kind to the fullest extent allowed by South Carolina State Law. CCPRC shall defend and be fully responsible for any and all claims, damages or injuries arising from or attributable to the acts or omissions of its employees or agents.

This Memorandum shall be construed in accordance with the laws of the state of South Carolina.

This Memorandum may be amended or supplemented in writing, if signed by both parties obligated under this Memorandum.

If any provision of this Memorandum is found to be invalid or unenforceable, the remaining provisions will continue to be valid and enforceable.

This agreement will be reviewed annually and will require renewal by both parties five years after execution and each five year period thereafter. It is the intention of both parties to continue in this Agreement for as long as this beach access for EMS is needed by the IOP.

SIGNED this                    day of                    ,

In the Presence of: City of Isle of Palms, South Carolina

BY: \_\_\_\_\_

As to THE CITY OF ISLE OF PALMS, SC

TITLE:

BY: \_\_\_\_\_

As to CHARLESTON COUNTY PARK & RECREATION COMMISSION

TITLE:

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ORDINANCE 2025-02

AN ORDINANCE TO AMEND TITLE 8, MOTOR VEHICLES AND TRAFFIC, CHAPTER 2, STOPPING STANDING, AND PARKING OF VEHICLES, ARTICLE C, BEACH PARKING, SECTION 8-2-44 OF THE CITY OF ISLE OF PALMS CODE OF ORDINANCES.

WHEREAS, the Isle of Palms City Council has the authority to amend its Code of Ordinances when it deems it to be in the best interest of the citizens of the City, and now desires to do so with respect to the subject of parking.

NOW, THEREFORE, BE IT ORDAINED by the Mayor and Councilmembers of the City of Isle of Palms, that Section 8-2-44 of the Isle of Palms Code of Ordinances are hereby amended as follows:

SECTION 1. That Section 8-2-44. "Permit; fees." be amended to state:

**Sec. 8-2-44. Permits; fees.**

No permit or parking fee shall be required to park in the designated beach parking zones. A fee shall be required to park in the Municipal Parking Lots located on Pavilion Drive and on-street on Ocean Boulevard between 10<sup>th</sup> and 14<sup>th</sup> Avenues as set by resolution approved by City Council.

SECTION 2. Should any part of this Ordinance be held invalid by a Court of competent jurisdiction, the remaining parts shall be severable therefrom and shall continue to be in full force and effect.

SECTION 3. That all ordinances or parts of ordinances conflicting with the provisions of this Ordinance are hereby repealed insofar as the same affect this Ordinance.

SECTION 4. That this Ordinance take effect immediately upon approval by City Council.

PASSED AND APPROVED BY THE CITY COUNCIL FOR THE ISLE OF PALMS ON THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 2025.

\_\_\_\_\_  
Phillip Pounds, Mayor

(Seal)

Attest: \_\_\_\_\_

Nicole DeNeane, City Clerk

STATE OF SOUTH CAROLINA	)	LAW ENFORCEMENT
	)	MUTUAL AID AGREEMENT
COUNTY OF CHARLESTON	)	CITY OF ISLE OF PALMS /
		CHARLESTON COUNTY AVIATION AUTHORITY

This agreement, made this 19<sup>TH</sup> day of FEBRUARY, 2025, between the Charleston County Aviation Authority (hereinafter "Aviation Authority"), through Charleston County Aviation Authority Police Department (hereinafter "CCAAPD"), City of Isle of Palms (hereinafter "Isle of Palms"), through the Isle of Palms Police Department (hereinafter "IOP"), and "Party" as to each, collectively the "Parties", provides as follows:

**SECTION 1: PURPOSE OF THE AGREEMENT AND SERVICES TO BE PROVIDED**

Whereas, it is the mutual advantage and benefit of the Aviation Authority and Isle of Palms that each agency to render mutual aid law enforcement services as may be needed from time to time. It is further recognized that there may be situations where additional law enforcement officers and services are needed. These services may include, but are not limited to, patrol services, crowd control, traffic control, and other emergency service situations. The use of law enforcement officers to perform law enforcement duties outside of the territorial limits of the jurisdiction where the law enforcement officers are legally employed may be desirable and necessary in order to preserve and protect the health, safety, and welfare of the public.

**SECTION 2: AUTHORITY**

Any county, incorporated municipality or other political subdivision of this State may enter into mutual aid agreements as may be necessary for the proper and prudent exercise of public safety functions and in accordance with S.C. Code Ann. § 23-1-210 and § 23-20-10 et seq. of the Code of Laws of South Carolina, 1976 as amended.

**SECTION 3: POWER OF AUTHORITY OVER PERSONNEL, EQUIPMENT, AND FACILITIES**

- A) The Aviation Authority authorizes the Police Chief of the CCAAPD or his designee to render and request mutual law enforcement aid from the Isle of Palms Police Department to the extent of available personnel, equipment, and facilities not required

for adequate protection for the remainder of the Isle of Palms Police Department. The Police Chief or commanding officer of the Isle of Palms Police Department shall determine the amount of personnel, equipment, and the facilities available to render mutual law enforcement aid to CCAAPD. His/Her decision shall be final.

- B)** The Isle of Palms Police Department authorizes the Police Chief or his/her designee to render and request mutual law enforcement aid from CCAAPD to the extent of available personnel, equipment and facilities required for adequate protection. The Police Chief or commanding officer of the CCAAPD shall determine the amount of personnel, equipment, and the facilities available to render mutual law enforcement aid to the Isle of Palms Police Department. CCAAPD Chief's decision shall be final.
- C)** Law Enforcement officers acting under this agreement shall be commanded by superior authority within their own agency to maintain the peace and/or perform duties outside of their territorial limits. These law enforcement officers shall be under direction and authority of one person from their own agency/jurisdiction. That person shall in turn be under the direction and authority of the host jurisdiction to which they are called to perform law enforcement and/or peace duties. They shall have the power and authority of law enforcement officers and peace officers as provided by law, including the power to arrest. All arrests and any enforcement actions and prosecutions shall remain within jurisdiction where such action would be properly brought in the absence of this agreement.

#### **SECTION 4: FINANCIAL AGREEMENT**

- A)** Cooperative law enforcement service shall be rendered without charge to reciprocal participating agencies for routine law enforcement activities.
- B)** In the event of any extraordinary cost incurred in the rendering of aid under this agreement, a request may be submitted in writing for compensation by the agency rendering aid.

## **SECTION 5: LIABILITY**

- A) Participating agencies shall not be liable or obligated to indemnify any other person or entity for any of its equipment damaged or destroyed, and the individual officer or his/her estate shall not be indemnified for any material damage to his/her property, injury to his/her person or on account of his/her death resulting from the performance under this agreement.
  
- B) The Party receiving aid under this agreement shall not be responsible for reimbursing any amounts paid or due as benefits to employees of a Party giving aid under the terms of the South Carolina Workers' Compensation Act due to personal injury or death occurring while such employees are engaged in rendering aid under this Agreement. Both Parties shall be responsible for payment of compensation and benefits only to their respective employees.
  
- C) All individuals retain all compensation, pension, retirement and disability rights while performing duties in accordance with this agreement, and all officers shall continue to be paid by the entity where they are permanently employed as of the dates services are rendered.
  
- D) This agreement shall not be construed as or deemed to be an agreement for the benefit of any third Party or Parties, and no third Party or Parties shall have any right of action under this agreement for any cause whatsoever.
  
- E) To the extent permitted by law, and without waiving sovereign immunity, each agency shall be responsible for any and all claims, demands, suits, actions, damages, and causes of action related to or arising out of or in any way connected with its own actions, and the actions of its personnel in providing aid or law enforcement services under this agreement.

## **SECTION 6: RECORDS**

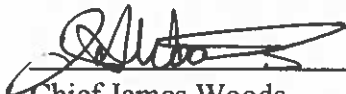
Each agency shall maintain records concerning the performance of services provided by the agency and make available as required by law pursuant to the Freedom of Information Act for public safety functions performed or arising under this agreement.

**SECTION 7: DURATION, MODIFICATION, AND TERMINATION**

- A) This agreement shall be in effect and legally binding when signed by each government entity and will renew automatically one year from the date this document is executed and annually each year thereafter unless fourteen (14) days written notice of intent to terminate is provided by one of the Parties.
  
- B) Any and all modification to this agreement must be in writing and approved by the appropriate governing bodies.

\_\_\_\_\_  
Chief Kevin Cornett  
City of Isle of Palms

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

  
\_\_\_\_\_  
Chief James Woods  
Charleston County Aviation Authority Police Department

Date: 02-19-2025



## PROPOSAL FOR ISLE OF PALMS (IOP), SOUTH CAROLINA

### *The Thorn Run Approach*

The foundation of TRP is built on our exemplary belief in communication. Now comprised of over 50 bipartisan government relations experts, TRP prides itself on always providing the highest-level counsel to our clients by utilizing a collaborative approach. We believe in a team-based approach to serving our clients. This means putting together a core team for simplicity in everyday communication, with access to the [entire firm](#) as needed.

By establishing open lines of communication with our clients to advance their objectives, we are prepared to handle the day-to-day work, as well as any rapidly developing and complex issues that may arise. This foundation has led to our growth as a leading Washington, DC-based government affairs firm that delivers all the values of a large firm while maintaining the personal touch of a boutique shop.

As one of the preeminent firms in the city, ranked the #7 lobbying firm out of 2,100+ federal lobbying firms reviewed by Bloomberg and POLITICO in 2024, our relationships run across the gamut of Washington — including Capitol Hill, the White House, and various executive branch agencies. Utilizing these, we will be able to comprehensively monitor, engage, and help influence your efforts.

### *TRP Local Government Clients*

While Thorn Run Partners represents more than 270 clients in a wide variety of subject areas, the following is our list of local government clients for the sake of expediency. TRP’s local government representation spans eleven states, showing the breadth of our diverse representation, many of whom are similar in size or the types of challenges the Isle of Palms faces. Our South Carolina-specific clients are highlighted in bold below.

- **City of Charleston, South Carolina,**
- **City of Greenville, South Carolina**
- **Richland County, South Carolina**
- **Roper Hospital, South Carolina**
- **The College of Charleston**
- **Clemson University**
- **Roper Hospital, South Carolina**
- **Conway Medical Center, South Carolina**
- Broward County, Florida
- Central Florida Expressway
- Charlotte County, Florida
- City of Billings, Montana
- City of Bloomington, Illinois
- City of Chandler, Arizona
- City of Corona, California
- City of Dallas, Texas
- City of Gresham, Oregon
- City of Gulfport, Florida
- City of Hanford, California
- City of Lompoc, California
- City of Manteca, California
- City of Overland Park, Kansas
- City of Pismo Beach, California
- City of Portland, Oregon
- City of Riverside, California
- City of Roseville, California
- City of Santa Maria, California
- City of Tualatin, Oregon

- City of Visalia, California
- City of West Hollywood, California
- City of Wichita, Kansas
- Clean Power Alliance, California
- Contra Costa County, California
- Del Norte County, California
- Denver Regional Council of Governments, Colorado
- Florida Inland Navigation District
- Galveston Island Park Board of Trustees, Texas
- Golden Gate Bridge Highway and Transportation Authority, California
- Los Angeles County Office of Education, California
- Marin Clean Energy, California
- Marion County, Florida
- Martin County, Florida
- Melbourne Airport Authority, Florida
- Miami-Dade County, Florida
- Monroe County, Florida
- Oak Lodge Water Services Authority, Oregon
- Okeechobee Utility Authority, Florida
- Palm Beach County, Florida
- Peninsula Clean Energy, California
- Raleigh-Durham Airport Authority, North Carolina
- Richland County, South Carolina
- St. Lucie County, Florida
- Sedgwick County, Kansas
- Sonoma County, California
- Sonoma Water, California
- Town of Cutler Bay, Florida
- Transportation Agency of Monterey County, California
- Village of Islamorada, Florida
- Village of Key Biscayne, Florida
- West Coast Inland Navigation District, Florida

## *Areas of Experience*

As described above, the TRP team for Isle of Palms has helped local government clients secure well **over \$5 billion** for their needs as well as deliver policy wins that in some cases dwarf the value of funded projects. This includes over \$217 million in recent funding for clients as part of the most recent FY 2024 appropriations package. Additional successes as well as TRP’s recent experience in specific issue areas of interest to the City are detailed below.

While we are proud of returning tax dollars to our client communities for important local projects, we are most proud of sustained advocacy efforts that truly make a significant difference in lives of the constituents of our clients. These are often the hardest efforts, but they are ultimately the most rewarding. We believe the advocacy effort on behalf of Isle of Palms would fall into that category.

### *Stormwater Flood Control and Resiliency Improvements*

TRP has substantial experience working on flood control, ecosystem protection, environmental restoration, shoreline and hurricane protection projects, and other related Corps of Engineers issues from three different but equally important viewpoints – legislative, Federal agency, and local, and has strong relationships with Headquarters, Division, and District offices of the Corps. Our team understands the processes, personalities, and policies of the Corps throughout its bureaucratic levels.

TRP’s team also works closely with the Energy and Water Appropriations Subcommittees, the House Transportation and Infrastructure Committee, and the Senate Environment and Public Works Committee on a frequent basis. Our team members possess direct knowledge and experience in handling the funding and policy issues associated with port and other Corps projects. We understand the legislative processes, planning, and budgeting behind funding decisions – an interrelationship of heightened importance because of Congress’s increasing dependence on Corps work plans.

TRP’s team has not only secured Federal funding for projects or studies, but also works directly with the Corps of Engineers to solve problems with projects or studies, encourages the Corps to take quick action on studies, and works proactively to address potential problems. The team has dealt with the details of many

Corps projects and studies, including reimbursable construction projects, feasibility studies, General Reevaluation Reports, Limited Reevaluation Reports, Design Deficiency Reports, Project Cooperation Agreements, Project Implementation Reports, Dredged Material Management Studies, Contributed Funds Agreements, and Continuing Authorities Program projects. We have worked on both port and coastal projects from the initial study effort, through authorization, to funding and ultimately, construction. A representative listing of several of our team’s accomplishments is provided below.

- Helped the City of Visalia, California secure a \$1.998 million disaster recovery grant from the Economic Development Administration for the construction of storm drainage and flood management facilities to reduce the potential of localized flooding in the City’s downtown area
- \$865,000 in the State of California’s Beach Erosion Control Program budget for the City of Pismo Beach, California’s bluff erosion project
- \$1.687 million over five years for unbudgeted construction of “new start” flood control project, Contra Costa County, California
- Pismo Beach, California named for three consecutive years in an appropriations bill so they receive top priority for funding from the Section 103 Corps of Engineers small shoreline protection projects program
- \$5,484,300 for the Twin Lakes Subdivision pre-disaster mitigation project in Monroe County, Florida
- \$4,800,000 for the construction of the jetty at the St. Lucie Inlet, Martin County, Florida
- Worked with two separate communities on their individual Corps of Engineers projects to secure exemptions from new congressionally-mandated “Independent External Peer Review” requirements, thereby saving months of time and hundreds of thousands of dollars of additional cost
- \$22 million for Palm Beach County Shore Protection Project, more than half of which was to reimburse the County for previous expenditures, which was historically a low priority for the Corps of Engineers.
- Helped Martin County, Florida achieve more favorable repayment terms of debt owed by the County to the Corps of Engineers. The Corps originally sought \$1.9 million from the County in 30 days. After our negotiations were completed, the County had 4 years to remit the funding with no interest charges.

### ***Economic Development, Workforce Training, and Housing***

The TRP Local Government Practice Group has extensive experience working with local and regional governments to help achieve their economic development goals. We work closely with the Economic Development Administration (EDA), the Department of Agriculture (USDA), the Department of Housing and Urban Development (HUD), and other Federal agencies to not only secure funding, but also create new opportunities for our client’s communities. The EDA provides a good source of funding for public works projects, such as wastewater treatment, roads, and other utilities, that bring high-quality jobs to a community. With HUD, we have a strong rapport with the Offices of Congressional and Intergovernmental Affairs, Community Program Development, Economic Development, and others, working on matters pertaining to the HOME Investment Partnership Program, Community Development Block Grant (CDBG) Program, and Sec. 108 Loan Guarantee Program, Lead Hazard Control, and Healthy Homes, and homelessness issues. Annually, we work to support funding for CDBG, which is often slated for a reduction in the Administration’s budget request but funded at stable levels by Congress

Representative examples of our economic and community development, workforce training, and housing successes are listed below:

- \$1.3 million for renovations to Pioneer Park in Lompoc, California
- \$1.5 million for renovations to Gulfport Senior Center for Gulfport, Florida
- \$500,000 to construct a Japanese Community Center in Santa Maria, California
- \$561,000 for renovations to the Veteran's Memorial Building in Hanford, California
- \$750,000 for a Navigation Center for Manteca, California
- \$791,200 for Equitable Energy Resilience and EV Infrastructure for Sonoma County, California
- \$650,000 for Marin City/Golden Gate Public Housing Energy Efficient Lighting, Marin County, California

- \$1 million for a US 101 Auxiliary Lane, Transportation Agency for Monterey County, California
- \$1 million for Park Infrastructure Improvements for the Unified Government of Wyandotte County/Kansas City, Kansas
- \$1.5 million for Sumner Area Green Corridor, Unified Government of Wyandotte County and Kansas City, Kansas.
- \$1.5 million for 6th St. – Heritage Trail, Unified Government of Wyandotte County and Kansas City, Kansas.
- \$400,000 for Klamm Park, Unified Government of Wyandotte County and Kansas City, Kansas.
- \$750,000 for the Healthy Homes Program for Marin Clean Energy, California
- \$2 million for the Electric Vehicle Charging Program expansion for Marin Clean Energy, California
- \$2 million for a housing renovation project, Cerebral Palsy Research Foundation, Wichita, Kansas
- \$500,000 for an Energy Storage Program, Marin Clean Energy, California
- \$750,000 for a Just Transition Economic Revitalization Plan Project, Contra Costa County, California
- \$700,000 for the Veterans Memorial Buildings Improvements Project, Contra Costa County, California

### ***Water and Wastewater Reliability and Environmental Protection***

TRP tackles water resource issues at the Federal level, including drinking water and wastewater improvements, through a multi-pronged approach that includes regulatory intervention, appropriations for environmental infrastructure projects, and policy reform. Among the many issues we have worked on include reclaimed water, nutrient issues, watershed protection, wetland conservation, coastal restoration, dredging for navigation, onshore and offshore energy exploration, air pollution, pesticides, “Brownfields,” the Clean Water Act, Section 404 permitting, and innovative environmental research and development. Likewise, we work very closely with the Environmental Protection Agency (EPA), as well as the House and Senate Appropriations Committees, to maintain robust funding for the State Revolving Loan Funds, which provide loan/grant funding to communities. Aside from funding and policy, we work with clients, the EPA, and Congress to ensure that any federal rules in the areas of water and wastewater are fair and based on science, as they can have significant costs to local governments, utilities, and others.

Funding successes on behalf of our clients include:

- \$16.62 million for Central Coast Blue, a reclaimed water project in Pismo Beach, California over three years from the Bureau of Reclamation’s competitive Title XVI WIIN Act-eligible water reclamation infrastructure program.
- \$91 million for the Florida Keys Water Quality Improvement Program, U.S. Army Corps of Engineers, Environmental Infrastructure (i.e. wastewater) project for the Florida Keys communities, Monroe County and the Village of Islamorada, Florida.
- Assisted in securing two EPA WIFIA loans, valued at \$461 million, for the City of Wichita.
- \$2,000,000 to develop the Kaw Point Wastewater Treatment Plant Biosolids Project in the Unified Government of Wyandotte County/Kansas City, Kansas
- \$3,200,000 to develop the Ackerman Septic to Sewer wastewater collection system in Charlotte County, Florida
- Assisted in securing a \$37 million WIFIA loan for the City of Roseville, California for improvements to the City’s drinking water infrastructure
- Helped the City of Visalia, California secure a \$1.998 million disaster recovery grant from the Economic Development Administration for construction of storm drainage and flood management facilities to reduce the potential of localized flooding in the City’s downtown area.
- \$67,000 in technical assistance from the Environmental Protection Agency to the City of Santa Maria, California to support integrated planning for municipal wastewater and stormwater management. The city was one of only five awardees.
- Secured a reauthorization of an aquifer storage and recovery project and \$1 million for the project, City of Wichita, Kansas.

- \$2.53 million in Federal funding for the Cambria Community Services District's Corps of Engineers seawater desalination project

### ***Disaster Recovery and Emergency Management***

Our team has extensive experience working with the Federal Emergency Management Agency (FEMA) to help local governments respond to critical emergencies. TRP represents both coastal and inland communities susceptible to natural (and man-made) disasters in California, Florida, and Texas. For instance, in 2017 and 2018, we worked with the Corps of Engineers and our clients to ensure damaged areas in Florida and Texas were assessed and funded. As a result, nearly \$350 million was allocated to four of our county clients by the Army Corps of Engineers for damages to our clients' coastlines and waterways.

Meanwhile, all local governments want to maintain public safety services, including communications, if not improve them. TRP works closely with many of the FEMA grant programs, including the Assistance to Firefighters Grants (AFG) and the Staffing for Adequate Fire and Emergency Response Grants (SAFER).

Funding successes on behalf of our clients include:

- Over more than 15 years, secured millions for projects on Federal lands in Del Norte County, California that benefit residents and tourists to the community. Also have worked on a variety of other federal land management issues like fuel reduction projects, trails management plans, access improvements, land management designations, and watershed protection projects, among other things.
- \$1,272,234 to the City of Manteca, CA through the Staffing for Adequate Fire and Emergency Response (SAFER) grant program to allow the Manteca Fire Department to restore staffing levels to comply with National Fire Protection Association guidelines.
- Worked with County to assist in maximizing and accelerating federal assistance essential to recovery from devastating wildfires in Sonoma County, California.
- Secured approval from FEMA to extend the period of performance for a Hazard Mitigation Grant Program project for St. Lucie County, Florida, saving the client more than \$850,000 in contract costs.
- Secured statutory requirement that projects for resiliency to natural disasters be given priority for funding, Sonoma County, California
- Fought cuts to the Emergency Management Performance Grant program, providing clients with additional funding for their emergency management operations.
- \$300,000 to the City of South Salt Lake, Utah for their Waterline Replacement Project to increase capacity for fire protection and growth
- \$988,410 to the City of Santa Maria, California from the Assistance to Firefighters grant program for the purchase of an aerial apparatus vehicle.
- \$59,527 to the City of Santa Maria, California from FEMA's Assistance to Firefighters grant program for operations and safety activities.
- Engaged with Congress and FEMA on behalf of the City of Santa Maria, California to successfully advocate for making ballistic protective equipment (BPE, e.g. bulletproof vests) eligible for funding from the Assistance to Firefighters Grant (AFG) program, beginning in Fiscal Year 2014. Prior to our efforts, the AFG program did not allow for funding of BPE, which has become increasingly important for firefighters and other emergency medical service personnel attempting to reach the wounded while responding to active shooter and mass casualty incidents.
- \$158,467 to the City of Manteca, California from FEMA's Assistance to Firefighters grant program to purchase new self-contained breathing apparatus equipment that meets current firefighting standards.
- \$199,040 to the City of Visalia, California from FEMA's Assistance to Firefighters grant program to purchase cardiac monitors for their firefighters.
- \$5.7 million to the City of Santa Maria, California from two FEMA fire grant programs (SAFER and Fire Stations) to both build a new fire station and staff it with firefighters

### ***Public Safety and Law Enforcement***



Law enforcement issues have broad support among members of Congress, with funding regularly available for police departments, communities, and school districts for hiring programs, technology, crime prevention, and intervention. Our work includes routine advocacy with the Department of Justice and its sub-agencies, including the Community Oriented Policing Services (COPS) office, Bureau of Justice Assistance (BJA), and the Office of Juvenile Justice and Delinquency Prevention (OJJDP), to name a few. Our relationships extend to the congressional committees of jurisdiction, including the House and Senate Committees on the Judiciary, and the House and Senate Appropriations Subcommittee on Commerce, Justice, and Science.

A sample of our clients' successes in obtaining support for law enforcement and crime prevention programs is included below:

- \$550,000 for the Sheriff's Office Computer Aided Dispatch (CAD) and Records Management Systems (RMS) Update in Del Norte County, California
- \$750,000 to integrate mental and behavioral health resources into the justice system in the Unified Government of Wyandotte County/Kansas City, Kansas
- \$1,180,000 for the Policing the Teen Brain/Strategies for Supporting Youth in the Community program for Contra Costa County, California
- \$1 million for the Transition Aged Youth Diversion program for Contra Costa County, California
- \$1 million to establish the Contra Costa Crisis Services Hub, Contra Costa County, California
- \$1 million for a Mobile Crisis Response Team (MCRT) Expansion Project for Contra Costa County, California

### ***Transportation Infrastructure***

The broad array of transportation and infrastructure clients we represent means that we are well-versed in the appropriations and authorizing bills, as well as Executive Branch grants and regulations that will impact Isle of Palms transportation funding efforts. The TRP team has extensive experience advocating to Congress and the Department of Transportation (DOT) modal agencies, including the Federal Highway Administration (FHWA), Federal Transit Administration (FTA), Federal Railroad Administration (FRA), and Federal Aviation Administration (FAA) on behalf of transportation agencies and local governments.

The TRP team also works closely with the House Transportation and Infrastructure Committee, the Senate Environment and Public Works Committee, the Senate Commerce, Science, and Transportation Committee, and the Senate Banking, Housing and Urban Affairs Committee on authorization and policy issues. TRP can be a powerful champion on transportation issues important to the County and can emphasize the value of funding opportunities for a variety of transportation needs.

During consideration of the surface transportation bills SAFETEA-LU in 2005 and MAP-21 in 2012, TRP team members successfully advocated on issues including higher funding levels for highways and transit; reforming Small Starts criteria; standards for highway preservation; expanding the authority for states to assume environmental clearance authority from the Federal government; authorization and continuation of the Projects of National and Regional Significance program; preventing the elimination of dedicated transit funding; maintaining broad eligibility for bus rapid transit; allowing state and local governments to receive higher Federal shares when using innovative technologies; and providing dedicated deployment funding for asphalt and concrete technologies to assist States in implementing these cost-saving innovations.

During the FAST Act debate in 2015, we advocated on behalf of our clients for increased topline funding for Federal transportation programs, as well as increased sub-allocations to local governments and Metropolitan Planning Organizations.

Meanwhile, during the debate that resulted in the passage of the Infrastructure Investment and Jobs Act, we advocated heavily from a transportation perspective to ensure robust funding for the Capital Investment Grant Program, from which several of our clients will seek funding. We also sought robust discretionary

grant opportunities for communities and transportation agencies. In other areas, meanwhile, we advocated successfully for funding for reclaimed water projects, the Army Corps of Engineers, and other initiatives sought by our clients.

Some of our transportation funding and policy successes over the past few years include:

#### Highways, Bridge and Road Improvements

The TRP team also has extensive experience securing funds for local governments through competitive grant programs, which were expanded significantly by the passage of the Bipartisan Infrastructure Law and the Inflation Reduction Act, to name two. TRP has a deep understanding of the Executive Branch and the ability to access all levels of the DOT. We bring an insider's understanding of how these institutions work, who to meet with, how to frame an issue for Executive Branch policymakers, and when to make those visits. This has allowed us to secure the following competitive grants on behalf of local government clients:

- \$400 million in 2022 Bridge Investment Program Large Bridge Grant funding for the Golden Gate Suspension Bridge Seismic Retrofit project for Golden Gate Bridge, California
- \$15 million for a grade separation project, City of Riverside, California
- \$22 million BUILD Grant funding for North Junction in Wichita/Sedgwick County, Kansas to alleviate a traffic bottleneck
- \$18.35 million in BUILD Grant funding for road infrastructure projects in El Paso County, Colorado to support the growing military installations
- \$1 million for a Reconnecting Communities Planning Grant, City of Wichita, Kansas

A diversified approach to transportation policy is critical. Our advocacy not only includes helping secure funding for a project, but also helping a local government understand how a proposed Federal policy or regulatory proposal directly affects the operations of your government or a specific project.

To highlight other transportation initiatives, we have also successfully assisted on the following projects:

- \$49 million to Galveston County, Texas over several years for the reconstruction of the Galveston Causeway Railroad Bridge, deemed by the inland waterway users as the most dangerous impediment on the Gulf Intracoastal Waterway
- \$1.8 million for Card Sound Bridge replacement planning for Monroe County, Florida
- \$4.4 million for the expansion of Marlin Road in the Village of Cutler Bay, Florida
- \$101,175 for a Traffic Control Project for the City of Winter Park, Florida
- \$1 million for a US 101 Auxiliary Lane, Transportation Agency for Monterey County, California
- \$8 million for construction of a new bridge, City of Dallas, Texas

#### Multimodal Projects

- \$700,000 to develop a bicycle/pedestrian route along the East Sir Francis Drake Gap Closure, Marin County, California
- \$3.18 million for the 181st Ave. Safety Improvements Project, City of Gresham, Oregon
- \$10,473,900 in TIGER V competitive funding to Lee County, Florida to implement the \$13,210,918 Lee County Complete Streets Initiative. This project will support bicycle and pedestrian transportation connections throughout the County's regional trail network: the Tour de Parks Loop, the University Loop, and the Bi-County Connector.
- \$300,000 to the City of San Clemente, California to help construct the City's Coastal Rail Trail
- \$380,000 to the City of South Salt Lake, Utah for streetscaping along two main arterials, both increasing City beautification efforts and improving pedestrian safety
- \$1.1 million to the City of Pismo Beach, California to complete the last phase of their beachfront Promenade
- \$1.5 million for Sumner Area Green Corridor, Unified Government of Wyandotte County and Kansas City, Kansas

- \$1 million for bike/hike trail, Contra Costa County, California

### Transit

- \$14.4 million for a multimodal transit center in Wichita, KS from the 2019 Bus and Bus Facilities competitive grant program
- \$17,275,000 in Federal funds to Broward County Transit from the 2019 Bus and Bus Facilities competitive grant program to help fund part of a \$51 million project to rehabilitate and reconstruct existing O&M buildings, construct new Administration and Training buildings, and add infrastructure for electric buses
- \$3.9 million for electric transit buses, City of Wichita, Kansas
- Ongoing renewal of a Federal compressed natural gas tax credit through the end of 2025 that has provided a city client with several million in funding which is used to support the transit system.
- Successfully included language in MAP-21 to provide mid-sized transit systems with new flexibility on how they spend Federal transit funding. Under prior Federal law, transit agencies must use their entire allocation on capital or maintenance expenses in UZA's of more than 200,000 people. With the language we secured, Federal law will no longer simply link population with how Federal transit funds can be spent by local governments. Instead, the size of a transit system is the arbiter. As a result, some systems will gain flexibility and be able to use a portion of their Federal transit funding on operations, not just capital, if desired.



## *Methodology and Implementation Plan*

Isle of Palms has picked an opportune time to examine your federal appropriations, regulatory, and lobbying needs. Over the past several years, much has changed in Washington, and with the passage of the Bipartisan Infrastructure Law, the Inflation Reduction Act, and the return of congressionally directed spending, new opportunities have arisen. TRP prides itself on its agility, which is essential in today's political environment.

Below is an overview of how we would undertake the work for the Isle of Palms. This approach is like the successful approach we use for many of our local government clients, from establishing annual priorities and pursuing Federal funding and beneficial legislation, to staying in regular contact and communicating our work to the City. TRP works closely with city governments from around the country and local government lobbying groups, including the National League of Cities (NLC), making us capable of quickly identifying and addressing issues that may impact the City.

### *Developing a Federal Agenda; Collaborating with Isle of Palms Officials and Staff*

At the commencement of our work for the Isle of Palms, TRP will work with your staff and officials to develop a Federal Agenda for 2025. The Federal Agenda will comprehensively summarize issues and funding opportunities essential to the Isle of Palms. The document will thoroughly outline each area, its potential impacts on the City, and recommend policy positions. By creating a comprehensive document, we are prepared to take advantage of any opportunity or quickly work to mitigate any emerging areas of concern. This document provides transparency to the City and its stakeholders regarding our efforts in Washington, DC. It also serves as a benchmark for everyone involved regarding progress toward achieving your goals.

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*"Your accessibility has always been great; we can get ahold of you practically any time, day or night. Sometimes I know that is probably challenging for you... but we really appreciate your accessibility and the things you've done for us." – former Supervisor Gerry Hemmingsen, Del Norte County, Calif.*

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While Isle of Palms can rightfully expect its consultant to provide candid objective advice on the likelihood of success on any agenda item, we also believe that a client should also expect creativity, proactivity, and enthusiasm for its agenda. "That's never been done!" should be a challenge statement rather than a call for a less ambitious agenda.

### *Assist in the development and submission of Federal appropriations/authorization requests*

The TRP team has extensive experience securing congressionally directed spending prior to 2010, with our partners having secured significant Federal resources for our respective clients during those years, success that we expanded upon in the last three years through the new process instituted in the House and Senate. With the return of congressionally directed spending in 2021, Congress has created an opportunity for the City to seek funding for its priorities in subsequent fiscal years, something with which we are well suited to assist.

During our careers, the TRP team has helped public sector clients secure more than \$5 billion for their needs as well as deliver policy wins that in some cases dwarf the value of funded projects. **With the return of earmarks in 2021, our team has secured over \$378 million in earmarked funding for our local**

government clients for a variety of projects and initiatives through the appropriations processes for Fiscal Years 2022 – 2024.

### ***Monitor and advise on Federal grant opportunities***

Much discretionary funding remains at the agency level to be awarded through competitive grants, including many new ones created by the Bipartisan Infrastructure Law and the Inflation Reduction Act, which provide several years of funding opportunities. TRP has helped our clients secure more than \$1.2 billion from these bills to date.

TRP will help the City navigate the policy, budgetary, and legislative processes to select the appropriate grant programs and improve chances of securing grant funding. TRP provides due diligence, including discussing the grant criteria and funding requirements with the issuing agency, and then provides appropriate counsel to Isle of Palms. TRP also engages in Congressional outreach, such as working with Congressional offices to submit letters of support for the City’s grant applications.

TRP’s continual contact and close working relationships with Federal agencies allow us to glean intelligence in advance of public announcements. This knowledge permits us to provide the City with timely information on research and infrastructure funding opportunities. TRP will also provide support to the City on responses to Federal public announcements. TRP has extensive experience supporting winning competitive grant proposals by enhancing grant submissions. Depending on the services required, we can help you improve your submission, realign it more competitively, add team players for better results, and constructively edit and improve the final product.

### ***Monitor legislation and proactively recommend positions***

In addition to the formal legislative agenda, TRP team members will monitor the introduction and progress of proposed legislation and provide analysis of the potential effects for the Isle of Palms. We will assist in developing your stance and contact the relevant members of Congress, including your congressional delegation and bill sponsors, on your behalf to ensure they are aware of – and act on – your position.

### ***Monitor proposed regulations and Agency activity***

TRP will closely monitor relevant agency regulatory developments, including proposed rulemakings, to ensure the Isle of Palms priorities are considered through the agency comment process. Likewise, TRP will ensure that conversations with Federal agency officials are made at the right time, that timely correspondence is sent, and that your congressional delegation is fully aware of your objectives.



## Arrange meetings for City elected officials and personnel with Congressional members, staff, and Federal agency officials

TRP handles all aspects of our client's Washington, D.C. trips. Prior to their arrival in Washington, D.C., TRP prepares a list of potential meetings. We work with our client in advance to ensure that those attending the meeting are knowledgeable about the topics being discussed and equipped with documents to supplement the conversation. Upon arrival in Washington, D.C., TRP briefs our client to ensure that the proper message and tone are conveyed in each meeting and provides all pertinent briefing documents. A member of the TRP-IOP client team will accompany City officials to all meetings with Congress, staff, and agency officials to provide background information and assist as needed. After the meetings, we complete any follow-up needed from the meetings and build upon the progress made during the trip.

### Timely Communication

As we advocate on behalf of our clients, we maintain a constant dialogue to regularly update them on our work as well as assess their priorities. We believe that effective communication is critical to successful advocacy, and we work diligently to keep our clients informed and updated regarding Federal legislation, proposed regulations, initiatives, funding opportunities, and news through a variety of different tracking sources and reports based on the needs and preferences of each client. Apart from that personal engagement, the Isle of Palms will receive the *TRP Tip Sheet* (example to the right) daily, which is a morning summary of Capitol Hill activity, political insight, notable news stories, and links to relevant TRP memos and reports. Full examples of recent *Tip Sheets* are also available at [twitter.com/thorn\\_run](https://twitter.com/thorn_run).

As we engage with the Isle of Palms and the Federal government, the TRP Team will provide the following forms of written information:

- Analyses of budget requests and forecasts for policies and programs;
- Reports of, and testimonies from, relevant committee hearings and markups;
- Memos on pertinent Federal initiatives or topics;
- Federal agency and departmental regulations, guidelines, directives, and other instruments of administrative policy;
- Copies of proposed legislation and associated reports;
- “White papers” and materials geared toward elected officials and their staffs that justify your objectives in simple and straightforward language, providing Congress and the Executive Branch with the information they need to be successful.

*“Thank you for all that you’ve done to get St. Lucie County where it is today. So much Federal funding over the years, working with the federal agencies, you’ve made a huge difference for our community. You should be proud!” – former Administrator Howard Tipton, St. Lucie County, Fla.*

**THORN RUN PARTNERS**  
Est. 2010

### The TRP Tip Sheet

October 3, 2024

*Editor's note: With Congress out during the final stretch of the 2024 election, we'll be scaling back publication of the Tip Sheet to Tuesdays and Thursdays each week.*

#### QUICK TAKES

- **JOHNSON REJECTS CALLS TO RECONVENE CONGRESS.** Speaker Johnson rejected calls by lawmakers from areas affected by Hurricane Helene for Congress to return early to pass a supplemental disaster relief measure.
- **EPA PROPOSES MORE PUBLIC INFORMATION ABOUT 'FOREVER CHEMICALS.'** The agency issued a proposed rule to add 16 individual PFAS and 15 PFAS categories representing more than 100 individual PFAS to the Toxics Release Inventory.
- **ENERGY DEPARTMENT PLUGS \$1.5 BILLION INTO NEW GRID PROJECTS.** The funding announced Thursday will go toward the construction of an estimated 1,000 miles of new transmission lines with 7,100 megawatts of added capacity.
- **STATE OF PLAY ON THE 2024 ELECTION.** For more on the state of the 2024 election, click [here](#) to view our latest Special Report.
- **TRP CONGRESSIONAL RETIREMENT TRACKER.** Click to view TRP's congressional retirement [tracker](#).

#### CAPITOL HILL UPDATE

- **JOHNSON REJECTS CALLS TO RECONVENE CONGRESS.** In an interview early yesterday morning, House Speaker Mike Johnson (R-LA) rejected bipartisan calls by lawmakers from areas affected by Hurricane Helene for Congress to return to Washington early to pass a supplemental disaster relief measure. While acknowledging that Congress

*“Thank you so much for these critical updates! Both your updates and the general TRP updates are much needed and appreciated. Please keep updates like these and on other topics coming!” – Cameron Pennant, former Legislative Manager, Charlotte County, Fla.*

- Support or request letters for Congressional sponsors to use with relevant committees or Federal agencies; and
- Any necessary forms for appropriations or authorizations requests.

### *Experience working with Congress and the Federal agencies*

The foundation of support in Congress for a public entity’s advocacy efforts naturally includes their Congressional delegation and potentially members from their region and the state. **We already enjoy a great relationship with the Congressional delegation.** But perhaps more importantly, with a bipartisan team of more than 50 people, and a diverse group of clients, TRP’s relationships extend to key Congressional committee chairs and ranking members, committee members, and leadership in both the House and the Senate. Our personnel have backgrounds working as top-tier legislative aides to well-known, senior members of the House and Senate. This includes the Congressional committees having jurisdiction over issues impacting local government issues, such as:

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| <ul style="list-style-type: none"> <li>▪ <i>House Appropriations Committee</i></li> <li>▪ <i>House Energy and Commerce Committee</i></li> <li>▪ <i>House Education and Labor Committee</i></li> <li>▪ <i>House Judiciary</i></li> <li>▪ <i>House Natural Resources Committee</i></li> <li>▪ <i>House Transportation &amp; Infrastructure Committee</i></li> <li>▪ <i>House Veteran’s Affairs Committee</i> <ul style="list-style-type: none"> <li>▪ <i>House Ways and Means Committee</i></li> <li>▪ <i>Senate Appropriations Committee</i></li> <li>▪ <i>Senate Environment and Public Works Committee</i></li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>▪ <i>Senate Finance Committee</i></li> <li>▪ <i>Senate Commerce, Science, and Transportation Committee</i> <ul style="list-style-type: none"> <li>▪ <i>Senate Health, Education, Labor, and Pensions</i></li> <li>▪ <i>Senate Banking, Housing, and Urban Affairs Committee</i></li> <li>▪ <i>Senate Energy and Natural Resources Committee</i></li> <li>▪ <i>Senate Judiciary Committee</i></li> <li>▪ <i>Senate Veteran’s Affairs Committee</i></li> </ul> </li> </ul> |
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TRP engages in regular meetings with Congressional leadership and their staff on behalf of our clients in Washington. We advance already existing political relationships and work to establish new ones. We assist in correspondence between your Congressional delegation and other relevant members of Congress to ensure your viewpoint and suggestions are heard regarding legislation that affects local governments. TRP focuses its collective efforts intensely on the Congressional members that best enable us to accomplish your goals.

Beyond members of Congress, we have relationships at nearly every relevant Federal agency that we can call upon to benefit our clients. Because of our diverse local government and public entity client base, which includes cities, counties, school districts, ports and navigation districts, airports, transportation authorities, and various local taxing authorities, we are regularly meeting with intergovernmental teams, career civil servants, and senior level political appointees that are part of the Federal agencies and their sub-agencies, including the following:

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|--|--|
| <ul style="list-style-type: none"> <li>▪ <i>Department of Agriculture</i></li> <li>▪ <i>Department of Commerce</i></li> <li>▪ <i>Department of Education</i></li> <li>▪ <i>Department of Energy</i></li> <li>▪ <i>Department of Health and Human Services</i></li> <li>▪ <i>Department of Housing and Urban Development</i></li> </ul> | <ul style="list-style-type: none"> <li>▪ <i>Department of Interior</i></li> <li>▪ <i>Department of Justice</i></li> <li>▪ <i>Department of State</i></li> <li>▪ <i>Department of Transportation</i></li> <li>▪ <i>Department of Veteran’s Affairs</i></li> <li>▪ <i>Army Corps of Engineers</i></li> <li>▪ <i>Environmental Protection Agency</i></li> </ul> |
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The firm also offers our *Influencer Series*, where we host elected officials, leadership staff, and senior congressional committee staff to discuss the political landscape, legislation, and issues important to our clients. Our *Influencer Series* is a way for our clients to establish or solidify relationships with members of Congress and staff in an informal setting. Our ongoing series provide strategic intelligence on legislation of importance to local governments and an additional opportunity to voice our clients' priorities and goals. As part of our *Influencer Series*, our firm hosted the following in the recent past, among others:

- *House Speaker Mike Johnson's (R-LA) Chief of Staff*
- *Former Speaker Nancy Pelosi's (D-CA) Director of Floor Operations*
- *Sen. Minority Leader Mitch McConnell's (R-KY) Policy Advisor*
- *House Ways & Means Committee Staff*
- *Sen. Joni Ernst (R-IA)*
- *House Minority Whip Katherine Clark (D-MA)*
- *Senate Environment and Public Works Committee Staff*
- *Sen. Maggie Hassan (D-NH)*
- *Sen. Joe Manchin's (D-WV) Chief of Staff*
- *Sen. Markwayne Mullin (R-OK)*
- *Senior staff for the Senate Banking Committee*

## ***THE TEAM***

While you will have full and complete access to all of the experienced professionals at our firm, whose complete roster can be found on our [website](#), TRP prides itself in crafting smaller, more nimble teams to serve as your day-to-day points of contact. For IOP, we believe that the following team of professionals has the expertise to best serve your immediate needs.

### **Chris Lamond — Founding Partner**

Chris Lamond brings significant experience in developing, managing, and implementing government relations strategies to Thorn Run Partners. Mr. Lamond has built a career representing clients before federal, state and local governments and brings to Thorn Run more than 25 years of experience working for and with governmental entities.

Chris co-founded Thorn Run Partners in 2010, after a career on and off Capitol Hill. Chris' government experience includes working for U.S. Senator Fred Thompson (R-TN) and the U.S. Senate Committee on Governmental Affairs. Mr. Lamond joined Senator Thompson in 1994 and served on the Senator's personal staff in a number of legislative roles before moving to the Committee on Governmental Affairs when Senator Thompson became committee chairman in 1997. In 2008, Mr. Lamond also served as an advisor to the Fred Thompson for President campaign and continues to work in a number of unofficial roles for federal and state candidates around the country.

In addition to his position as founding partner at Thorn Run, Chris continues to represent corporate, non-profit entities, and trade associations before Congress. Chris has been an advocate for causes and industries in various sectors, including financial services, technology, transportation, education and health care. Chris' understanding of the legislative landscape and ability to create effective advocacy strategies have resulted in significant policy achievements for his clients. Beyond his work at Thorn Run, Chris is recognized as a thought leader and has contributed to industry publications, conferences, and panel discussions throughout the country.

Chris received a B.A. in Political Science from Furman University in Greenville, South Carolina and currently lives in Washington, DC with his wife and two children.

### **Jim Davenport — Partner**

Jim Davenport joined Thorn Run Partners in 2018, providing top-tier consulting services to public entities on a broad spectrum of issues. Jim represents a range of government clients, including cities, counties, airports, independent taxing districts, and education entities.

Jim's wide variety of public entity clients gives him exposure to the entire scale of federal agencies and programs, and he has developed expertise on an array of federal issues, including transportation, water infrastructure, navigation, energy and environment, public safety, and elementary, secondary and higher education. Jim operates strategically and with efficiency, offering his clients meaningful subject-matter knowledge coupled with a determined approach to achieving their objectives.

Jim continues to represent many of the first clients that ever retained him, representing several for more than 20 years. He is an experienced tactician in navigating the federal budget, congressional appropriations process and competitive federal grant opportunities to obtain federal resources on behalf of clients. He also consults and advises clients on legislation, agency rulemakings, and Administration policy to position his clients to take advantage of new opportunities and to protect and prepare themselves from regulatory impacts.

Prior to joining Thorn Run Partners, Jim spent over 18 years as a partner at Alcalde & Fay, representing local government entities from states across the country, including Florida, California, Virginia and Kansas. He has represented corporate clients in the areas of environmental remediation, homeland security and public safety, engineering, and energy. Before joining Alcalde & Fay, Jim served as Legislative Assistant in the office of the late Congressman Gerald B. Solomon of New York.

Mr. Davenport received his B.A in Government at St. Lawrence University, and obtained his J.D. from The Catholic University of America, Columbus School of Law.

Mr. Davenport lives in Arlington with his wife, Shari, and their two children.

### **Chas Thomas — Partner**

Chas Thomas joined Thorn Run Partners in 2017 after spending four years on Capitol Hill. While on the Hill, he worked primarily on financial services, telecommunications, energy, agriculture, natural resources, budget, and tax issues. Thomas maintains a strong network of relationships with policymakers and staff in both the House and Senate, ensuring a pathway for effective advocacy efforts that help impact policy.

Mr. Thomas served on the campaign of Senator Lindsey Graham (R-SC) prior to beginning his career on Capitol Hill in the office of Congressman Robert Pittenger (R-NC). While with Mr. Pittenger, Chas served as the Congressman's senior legislative assistant and lead staff liaison to the House Financial Services



Committee, including Monetary Policy & Trade, Financial Institutions & Consumer Credit, and Terrorism & Illicit Finance Subcommittees.

Since joining Thorn Run Partners, Mr. Thomas has continued to work on issues for clients around multiple industries. Chas has used his extensive experience within the financial services, transportation, energy, tax, and appropriations realms to implement legislative agendas that deliver targeted wins for clients.

Chas is a native of Greenville, SC and received his B.A. from the University of South Carolina. He currently lives in Alexandria, VA with his wife.

### **Jordan Marsh — Vice President**

Jordan Marsh brings a decade of experience in government relations, strategic advocacy, and political campaign management to Thorn Run Partners. With a deep understanding of federal and state policy, and an extensive network across the public and private sectors, he expertly navigates complex legislative landscapes to deliver tangible results for clients. As a South Carolina native with over six years of experience in the Governor's office, Marsh is well-positioned to expand the firm's influence and support for clients in the Palmetto State.

Prior to joining Thorn Run Partners, Jordan served as Director of Federal Affairs for South Carolina Governor Henry McMaster, representing the state's interests in Washington, D.C. He advanced the Governor's federal priorities, supporting initiatives across 25 state agencies in areas such as economic development, environmental policy, infrastructure, energy, healthcare, and disaster recovery.

As South Carolina's Infrastructure Coordinator, Jordan was instrumental in implementing and optimizing federal investments through the Infrastructure Investment and Jobs Act, CHIPS Act, and Inflation Reduction Act. He secured millions in federal appropriations and grants for key projects while managing a broad legislative portfolio and collaborating closely with Congress, the White House, and federal agencies.

Jordan also served as State Alternate to the Appalachian Regional Commission and the Southeastern Crescent Regional Commission, where he led rural development efforts through competitive grant programs. He acted as Governor McMaster's liaison to the National Governors Association and the Republican Governors Association, working on a wide range of federal and state policies while developing key relationships on Capitol Hill and with governors' offices nationwide.

Jordan's political career began on U.S. Senator Lindsey Graham's 2014 re-election campaign. He later directed Governor McMaster's successful 2018 campaign and led the South Carolina Republican Party's Victory campaign as State Director. Earlier in his career, Jordan played a key role in passing landmark transportation funding legislation while working for a South Carolina trade association.

A native of Florence, S.C., Jordan received a B.A. in Political Science from the University of South Carolina. He currently lives in Washington, D.C.

## **TERMS & RATES**

We pride ourselves on offering a full array of services to meet our clients' needs and obligations. We understand the significant investment federal policy and advocacy services require and set our fees on the anticipated scope of work. Based on our recent conversation and the clarification pertaining to the scope of work described, **we believe a monthly retainer in the amount of \$8,000 is appropriate.**

Please note that TRP does not bill back our clients for expenses such as taxis, meals, copying, etc. Additionally, any other amounts billed back would be for extraordinary expenses or long-distance travel, both of which require your pre-approval. We believe this model provides our clients with cost certainty and helps manage internal budgets.





Proposal

# Federal Advocacy and Grant Consulting Services for the City of Isle of Palms, SC and the Isle of Palms Water and Sewer Commission

January 22, 2025

Submitted by The Ferguson Group (TFG)  
1901 Pennsylvania Avenue, NW, Suite 700  
Washington, DC 20006

[www.thefergusongroup.com](http://www.thefergusongroup.com)

Contacts: **Roger Gwinn**  
202-255-5759

[rgwinn@tfgnet.com](mailto:rgwinn@tfgnet.com)

**Lane Dickson**  
202.331.8500

[ldickson@tfgnet.com](mailto:ldickson@tfgnet.com)



January 22, 2025

Douglas Kerr  
Interim City Administrator  
City of Isle of Palms  
1207 Palm Boulevard  
Isle of Palms, SC 29451

Chris Jordan  
General Manager  
Isle of Palms Water and Sewer Commission  
PO Box 528  
Isle of Palms, SC 29451

Via electronic mail to: [dkerr@iop.net](mailto:dkerr@iop.net); [cjordan@iopwsc.com](mailto:cjordan@iopwsc.com)

Dear Mr. Kerr and Mr. Jordan:

On behalf of The Ferguson Group, LLC (TFG), I am pleased to submit our proposal for Comprehensive Federal Advocacy and Grant Consulting Services jointly to the City of Isle of Palms and the Isle of Palms Water and Sewer Commission.

Founded in 1982, TFG brings over 42 years of expertise in federal advocacy, consulting, and grant services to public and private clients across 34 states. We proudly represent more than 200 public agencies nationwide, including the Towns of Cheraw and Mount Pleasant and the Beaufort-Jasper Water & Sewer Authority, providing targeted support in federal legislation, regulatory guidance, and funding strategies.

TFG's bipartisan, bicameral experience in Congress, combined with a strong record of federal agency collaboration, uniquely positions us to advance the City and Commission's priorities. With our support, the City of Isle of Palms and the Isle of Palms Water and Sewer Commission will benefit from proactive federal engagement, keeping lawmakers informed of critical local issues such as water, sewer, recreation, road improvements, economic development, stormwater drainage needs, and shoreline protection/beach renourishment, among many others. By educating your congressional delegation on the City and Commission's priorities, we help shape federal decisions that directly impact the City of Isle of Palms and the Isle of Palms Water and Sewer Commission.

TFG is well-positioned to maximize federal funding opportunities for the City and the Commission through grants, earmarks, and other avenues. We will advocate for the City and Commission's interests by working closely with Congress and federal agencies on policies and regulations that align with your goals. **Over the past four decades, TFG has delivered substantial results, helping our clients to secure over \$6 billion in federal funding since 2015 alone across infrastructure, water resources, economic development, and environmental initiatives.** Known for our dedication to advancing client interests, TFG stands among Washington's top independent advocacy firms, consistently delivering high returns on investment for clients of all sizes.

Thank you for considering our proposal. Should you have any questions, please feel free to contact me at (202) 255-5759 or by email at [rgwinn@tfgetnet.com](mailto:rgwinn@tfgetnet.com) or Lane Dickson at (202) 361-2575 or by email at [ldickson@tfgnet.com](mailto:ldickson@tfgnet.com).

Sincerely,

A handwritten signature in blue ink, reading 'W. Roger Gwinn', is positioned above the typed name.

W. Roger Gwinn  
CEO

## TFG Background

Founded in 1982, TFG delivers comprehensive federal advocacy, consulting, and grant services to public and private entities across 34 states. Our experienced team of seven equity partners and over 40 professional staff members, senior advisors, and administrative personnel is organized into three integrated divisions: Advocacy, Grants, and Consulting. TFG's team-centric approach ensures we are agile and effective in addressing complex regulatory landscapes. Our Washington, D.C., headquarters is complemented by strategically placed staff across the nation, offering our clients deep local insights and national reach.

We also advocate on behalf of national organizations focused on federal issues directly impacting local government, such as the National Association of Towns and Townships (NATaT). As *The Hill* – a prominent Washington newspaper, wrote, “The Ferguson Group wrote the book on representing local governments.”

TFG has a demonstrated track record of responding to our clients’ needs while also identifying and developing strategies to address emerging issues and opportunities. Please see client testimonials from the [Town of Mooresville, NC](#), the [City of Centerville, UT](#), and the [Family Farm Alliance](#).

We focus on issue areas relevant to some of the City of Isle of Palms and Isle of Palms Water and Sewer Commission’s priorities, such as:

- Water, Wastewater, and Stormwater
- Coastal Resilience and Protection
- Parks and Recreation and Historic Preservation
- Transportation Infrastructure
- Economic & Community Development
- Environment and Natural Resources
- Law Enforcement and Emergency Services

One of the cornerstones of TFG’s success is our ability to adapt to both policy and political changes in Washington. Our professionals have a history of helping our clients navigate changing political environments. We work on a bipartisan basis and develop productive working relationships with congressional representatives and their staff. Our congressional and agency relationships are not limited to offices “inside the Beltway.” We work regularly with key officials and staff in congressional district offices and federal agency staff in local and regional offices, where critical decisions are made.

**Since its inception, TFG’s primary focus has been representing public agencies at the federal level.** Our professionals are experts in accessing federal assistance through congressional earmarks (Community Project Funding/Congressionally Directed Spending), competitive grants, and influencing line-item funding for our clients’ priority programs. **Since Fiscal Year (FY) 2022, TFG has helped our clients secure nearly \$300 million in earmarked funding for their priority projects and initiatives.** Additionally, TFG works with our clients to

**TFG’s Mission Statement:**

**“Building Stronger Communities: We develop creative, innovative strategies that support client priorities and provide a vision to achieve our clients’ federal funding, public policy, and legislative goals.”**

utilize Report Language requests (e.g., encouraging, urging, or directing some type of action by a federal agency or program) and programmatic requests to fund priority programs at current or increased funding levels.

In other cases, TFG works with our clients to develop legislative remedies to complicated problems either through seeking simple amendment changes to larger bills or new programs at large. For example, TFG helped draft and advocate for legislative language in the 2014 Water Resources Reform and Development Act (WRRDA), which created the Water Infrastructure Finance and Innovation Act (WIFIA). WIFIA provides primarily public agencies access to federally backed, low-cost, long-term financing for larger-scale water infrastructure projects. To date, EPA has closed 138 WIFIA loans totaling \$21 billion in financing to support \$47 billion in water infrastructure projects. Several TFG clients currently participate in the WIFIA program.

In addition to TFG's legislative and regulatory experience, we also specialize in providing federal, state, and foundation grant services. Grant funding is an important aspect of a federal legislative program, and TFG has a stellar track record in helping our clients secure federal funding. **Since 2015, we have helped our clients win more than \$6 billion in competitive funding.** Communities must be strategically positioned and organized to compete for these opportunities. TFG can work with the City and the Commission to create comprehensive federal funding plans with a strategic framework for identifying and pursuing grant funds.

## Scope of Services

TFG provides comprehensive federal affairs support based on the needs and priorities of the client. Our approach to this work is outlined under **TFG Approach** for greater detail about how we will work with you to accomplish favorable outcomes.

### Advocacy

TFG will support the City and the Commission in all the activities below and other tasks as requested. For specific priorities, our scope of work may include any or all of the following, as applicable and necessary:

**Strategic Advice.** TFG will provide strategic counsel to the City and the Commission concerning applicable Congressional action, federal agency policy and regulation, and the federal activities impacting the City and the Commission's priorities and interests.

**Assistance in Communicating and Working with Federal Officials.** TFG will assist the City and the Commission in contacting Congressional Members and staff, congressional committees, the Administration and federal agency officials and staff at all levels of the federal government on these matters and will assist the City and the Commission in educating, negotiating, and advocating its objectives with these officials and staff.

**Advocacy on Budget.** TFG will seek to include resources in the budget requests of appropriate federal agencies to the extent necessary to accomplish the City and the Commission's objectives.

**Recommendations and Advocacy on Statutory Authorizations.** Federal legislation may sometimes be necessary to achieve some of the outlined objectives. When this is the case, TFG will provide the City and the



Commission's Congressional Delegation and the relevant congressional committees, the Administration, and federal agencies with institutional expertise and support as necessary to develop, advocate for, and implement federal legislation and authorities.

**Build Stakeholder Support.** TFG will advise the City and the Commission on obtaining and coordinating stakeholder support from key organizations or individuals (such as national and regional organizations, environmental groups, or business interests) that may be necessary to implement our strategy or objectives.

**Appropriations Advocacy.** Where federal funding assistance is appropriate to achieving the City and the Commission's objectives, TFG will provide the necessary logistical and institutional support to the South Carolina congressional delegation in pursuing these appropriations requests.

**Grant Project Advocacy.** TFG helps secure congressional support, including support letters and backing from strategic partners, to bolster grant applications. Federal grants are highly competitive and often, broad support for a project application can make the difference between a winning application and a highly ranked application that does not make the final list of awardees

**Preparing for and Scheduling Meetings in Washington, D.C.** TFG will advise if there is a specific need to visit Washington, D.C. to visit with agency policymakers, your congressional delegation, and relevant congressional committee staff and will work with you to prepare to advance your Federal Agenda during periodic trips to Washington, D.C.

## Competitive Grants

TFG offers a full suite of grant support services, providing our clients a competitive advantage in securing highly sought-after grant dollars. We specialize in representing public and private entities who share our passion for building strong and vibrant communities.

**Dedicated Grant Expert/Team.** TFG will assign a dedicated grant expert who will serve as a liaison to you and your staff to provide guidance and strategic advice for your grant funding efforts.

**Monthly Grant Update Meeting.** TFG experts will host monthly grant update calls to discuss the outlook of grant funding, the services provided, and engagement.

**Grant Alerts and Weekly Grant Updates.** TFG will provide grant alerts on priority grants as they are noticed or published. On high-priority grants or those with a short turnaround, TFG frequently distributes alerts regarding grant opportunities before their official release. Each Friday, we issue our Weekly Grant Update, which provides a recap of federal grant solicitations published that week to ensure you do not miss any opportunities.

**TFG Grant Funding Hub.** The City and Commission will have access to TFG's Grant Funding Hub, which houses our Grant Guides that provide an overview of grant programs in a specific issue area and document relevant information such as funding levels, match requirements, eligibility, and use of funds. TFG's Grant Funding Hub also includes a robust database of Grant Profiles that provides the key information you need to match a program with your needs and build a winning grant proposal.

**TFG Grants Showcase.** The City and Commission will have access to TFG's internal database of over 2,000 successful grant applications from a variety of programs to help inspire and guide the preparation of your

successful grant submissions. Reviewing past applications also allows TFG grant experts to identify trends in funded projects that can help frame how to present a project in a future application under the program.

**TFG Strategic Funding Plan.** Succeeding in grants means knowing your priorities and planning ahead. Based on our team’s knowledge and experience, we will work with the City and the Commission to identify, forecast, and monitor relevant funding opportunities that meet your specific needs. Our Strategic Funding Plan also allows your staff to know what is on the horizon and be prepared when a notice of funding availability is announced.

**TFG Funding Blueprint.** TFG conducts grant research on the federal, state, and foundation levels and will create a customized funding strategy geared to support your project. We will provide you with relevant grant information and recommendations on funding opportunities to target that are specifically tailored to your project and your community. Our grant research will not only look at open, available programs but also focus on grant programs expected to be released in the future, helping you stay “ahead of the game” and be prepared.

**Project Development and Readiness.** Working alongside your subject matter experts, the TFG grants team will provide strategic advice on how to get your project grant ready. Collectively, we will work to scope or rescope your project, identify background and technical information needed to support the grant application and match project goals with funding agency priorities. You will come out of this process with a list of actionable steps that need to be taken to ensure your project is grant-ready, including where TFG can support your team.

**Grant Editing and Review.** As appropriate, TFG staff will expertly review your application against the funder’s requirements, suggest content edits, and provide recommendations on improving your narrative before you submit. Grant editing and review does not include rewriting content but will help improve your chance of success by having TFG staff provide feedback on your grant proposal.

**Grant Debriefs.** Grant debriefs are important, especially if it turns out that your application did not get funded. TFG staff will help guide you through the grant debrief process and set up consultation with the funding agency to put your next applications in the best position to compete effectively in future solicitations. As part of this process, TFG will review your past grant applications and incorporate feedback from the Federal Agency so that you know exactly what needs to change for your future application.

**Grant Training.** We focus our grant training on building capacity, helping position you for success in the often-complex grant process. TFG offers training on grant basics, project prioritization, grant research, and grant writing. TFG also has established partnerships with other grant training professionals that specialize in post-award management who can be accessed to support grant management training needs. We can provide training on a one-on-one basis or through larger workshops, depending on your needs.

**Additional Service: Grant Writing.** Preparing winning grant proposals takes time, skill, and knowledge. TFG’s skilled grant writers will take your defined grant project idea from the start of the submission application. From filling out federal forms to crafting a persuasive and compelling grant narrative and corresponding budgets, you can be assured that your application will be complete, competitive, and submitted on time.

**Additional Service: Post-Award Grant Management Services.** On request, TFG can perform Post-Award Grant Management Services on a case-by-case basis, ensuring clients receive comprehensive support. Our services encompass expert guidance in managing grants, overseeing funding utilization, compliance tracking,

and reporting. With TFG's Post-Award Grant Management Services, clients can navigate the complexities of grant administration seamlessly, allowing them to focus on achieving their project goals.

**Additional Service: Negotiated Indirect Cost Rate Agreements (NICRA).** TFG is committed to supporting organizations in establishing robust proposals for Negotiated Indirect Cost Rate Agreements (NICRA). Our specialized services encompass thorough analysis, strategic planning, and expert guidance to ensure compliant proposals and assistance through the negotiation process. By collaborating closely with clients, we navigate the intricacies of NICRAs, leading to a thorough cost allocation plan, NCIRA proposal, negotiation, and recovery process.

## Proposed Team and Biographies

TFG’s approach to staffing is to assemble a team of individuals who, through education, training, and professional experience, are best positioned to provide the greatest value to the client. You will be assigned two team members who will serve as your primary point of contact, overseeing the distribution of work, and ensuring the quality of our work products on your behalf. TFG’s professional team works closely together and draws from the expertise of other TFG professionals to provide the City and the Commission with an incomparable level of service.

Team Member	Responsibilities
<b>Charmayne Anderson</b> Partner	Charmayne will co-manage all aspects of TFG’s relationship with the City and Commission, including advocacy and grants, focusing primarily on City priorities.
<b>Lane Dickson</b> Partner	Lane will co-manage all aspects of TFG’s relationship with the City and Commission, including advocacy and grants, focusing primarily on Commission priorities.
<b>Roger Gwinn</b> Chief Executive Officer	Roger will advise on agenda development and advocacy strategy, particularly focused on the appropriations process and matters related to the U.S. Army Corps of Engineers.
<b>Ann Durand</b> Associate	Ann will assist with the execution of the advocacy agenda and lobbying efforts.
<b>Elizabeth “Liz” Vela</b> Grants Analyst	Liz will lead the City and the Commission’s efforts on competitive grants.
<b>Catherine Riggs</b> Senior Grants Specialist	Catherine will lead any post-award grant management services.

In addition to your designated team, the City and the Commission will have access to all members of TFG’s professional staff, including, of particular note, [Earl Stockdale](#) and [Bradd Schwichtenberg](#), two former high-level officials in the U.S. Army Corps of Engineers, who will be engaged to assist the City and Commission on shoreline protection and other City water-related priorities. Biographies of the firm can be found on our website at [www.thefergusongroup.com](http://www.thefergusongroup.com). With the City and the Commission’s needs in mind, based on the proposed Scope of Work, TFG proposes the following team:



## Charmayne Anderson

PARTNER

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Charmayne Anderson is a Partner at TFG and has advocated for a diverse portfolio of public agencies and nonprofit organizations for over 30 years. With a long career in government affairs and advocacy, Charmayne brings a unique capability of engaging clients in the public policy process to meet their needs and objectives, forging partnerships with federal policymakers and engaging strategic partners for coalition-building and issue advocacy. As a result, she was named a 2022 Top Lobbyist by the National Institute of Lobbying and Ethics.

Centering her advocacy efforts on the health and well-being of individuals and creating sustainable communities that thrive, Charmayne has successfully developed and executed policy and funding strategies to address critical public infrastructure needs, service delivery and the quality of life of local constituencies.

While at TFG, she has brought greater federal resources into local communities through the congressional budget process, legislative authorizations and grants to support projects and programs such as innovative water and wastewater delivery systems, local law enforcement technology, homelessness prevention, community redevelopment, and renewable energy investments in public transportation. Charmayne also serves as the Director of Advocacy for Allergy & Asthma Network where she advocates to improve health outcomes for individuals living with asthma, allergies and related conditions.

Charmayne received her B.A. in Government and Politics, and her M.P.A. with a concentration in policy from George Mason University.



## Lane Dickson

PARTNER

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Lane draws on over 15 years of Washington experience in water, power, mining, and municipal tax and finance issues to help clients develop policy solutions and execute legislative and advocacy strategies with Congress and federal agencies. During his work on Capitol Hill and in the executive branch and private sector, he has been directly involved with drafting and passage significant water, public lands and energy legislation including the John D. Dingell, Jr. Conservation, Management, and Recreation Act, the Colorado River Drought Contingency Plan Authorization Act, Water Supply Infrastructure Rehabilitation and Utilization Act, and the Energy Act of 2020.

Prior to joining TFG, Lane served as staff for the House Committee on Natural Resources, the Senate Committee on Energy and Natural Resources, and the U.S. Department of the Interior, Bureau of Reclamation. He was also a federal affairs manager for a large water and electric provider and has served in a number of leadership positions in public power and western water trade associations and coalitions.

Lane maintains a diverse network of contacts with Members of Congress and staff from both sides of the aisle, political and career employees at various federal agencies, and staff and members of trade associations, interest groups, and companies. Using these relationships to bring often divergent opinions together to find a path forward on policy or legislation has gained him a reputation as an honest, solution-oriented advocate.

Lane holds a B.S. in Soil and Water Science from the University of California, Davis and an MBA from George Mason University.





## Roger Gwinn

CHIEF EXECUTIVE OFFICER

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Roger Gwinn, CEO of TFG, oversees the management of the firm, the delivery of client services and the development of new offerings to address the evolving needs of clients. Roger represents public agency and private interests specializing in water resources, community development and technology. A nationally recognized water infrastructure expert, Roger is known for creating and executing innovative and successful strategies to meet the challenging and complex needs of clients.

Recognized by Influence Magazine as one of Washington’s six “Top Gun” appropriations lobbyists, Roger joined TFG in 1993. Roger spent 15 years on Capitol Hill, serving two members of Congress and as an associate staff member on the House Committee on Appropriations.

Roger leads the firm’s representation of large-scale, regional water resources, environmental protection and economic development initiatives. Roger has worked with dozens of communities nationwide to help them secure hundreds of millions of dollars in federal funds for storm water, wastewater and drinking water system improvements. For example, Roger helped launch federal efforts that have steered more than \$1 billion into the multi-state Pacific Coastal Salmon Recovery Fund. He helped one rural community secure more than \$80 million in federal assistance to help defray the local construction costs of a new regional drinking water facility. In addition, Roger has led the firm’s representation of regional scale water reuse projects, including one where 10 public agencies in three counties are collaborating on a comprehensive regional water reuse program to help meet the water supply needs of agriculture, urban areas and the environment.

A long-time advocate of enactment of a Water Infrastructure Finance Innovation Act (WIFIA) which would provide a source of low-cost, long-term financing for water, wastewater and storm water infrastructure projects, Roger leads TFG’s efforts to improve existing policies and enact new legislation to broaden access to federal grants and create new financing options to help deal with the complex water challenges of today and tomorrow.

Roger was a member of the inaugural class of the Stennis Congressional Staff Fellows Program. He is among the founders of eCivis, the nation's leader in online grants information and grants management for local governments. Roger has his B.A. in Political Science from North Carolina State University.

## Ann Durand

ASSOCIATE

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Ann has extensive experience conducting and analyzing research. Primarily, her research has focused on developing and implementing public policy at the state and local government levels. Through her research, she has worked with the National League of Cities to track and compile a novel dataset of state and local government actions over the course of the COVID-19 pandemic. This data was made available to the public and has furthered the understanding of the interactions between levels of government in the legislative process.

Before joining TFG, Ann worked as a professor at The University of Alabama while obtaining her Master's in Public Policy and Administration. Since 2017, Ann has served on the Board of Directors for a community bank

in Georgia, where she oversees day-to-day business operations and strategic direction of the institution. In 2023, she was elected to the position of Board Secretary, tasked with keeping corporate records and ensuring regulatory compliance.

Over the years, Ann's research, writing, and collaboration skills have garnered recognition through journal publications and been awarded the 2022 Field Note of the Year in the State and Local Government Review.



## Elizabeth (Liz) Vela

GRANTS ANALYST

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Elizabeth (Liz) Vela is a Grants Analyst at TFG with extensive experience in public and nonprofit organizations since 1998. Liz specializes in needs assessments, grant writing, research, and policy analysis. She began her career in San Francisco after earning a BA in Political Science from Boston University, where she worked in nonprofit administration with the Foundation Center and community-based groups. Liz earned her Master of Public Affairs (MPA) from The Lyndon B. Johnson School of Public Affairs at UT Austin in 2000, focusing on public policy, and has lived and worked in Austin, Texas, since then.

Liz spent six years in county government as a planner with Travis County's Health and Human Services Department, where she developed data products and led community planning initiatives. She also collaborated with community organizations funded by the County. Liz then worked for the State of Texas for six years, specializing in policy research, federal funding compliance, and reporting across a range of public service sectors.

In recent years, Liz has managed large federal funding proposals, needs assessments, and philanthropic grant writing and reporting for a variety of clients, including community-based organizations, universities, and other nonprofit entities. Her expertise spans multiple areas, with a focus on organizational development, program design, and securing funding for a broad range of initiatives.



## Catherine Riggs

Senior Grants Specialist

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Catherine Riggs, a Senior Grants Specialist at TFG with over two decades of experience, has worked in multiple levels of government across the United States and with many nonprofit organizations. She began her journey in government services serving on staff with Congressman Mike Rogers, where she learned about the budgetary process and grant funding at the federal level. Since then, Catherine has been successful in finding funding solutions for a variety of projects in various sized local governments and utilities across the U.S. and territories.

In addition to pre-award grant services, Catherine also provides expertise in negotiating federal grant awards and indirect cost rates for organizations and award level negotiated indirect cost rate agreements (NICRAs). Catherine has written and worked in negotiating federal grant awards and providing post-award services with the DOE for Grid Resilience and Innovation Partnerships (GRIP), Maintaining and Enhancing Hydroelectricity Incentive Section 243 & 247 Programs, Energy Improvements in Rural or Remote Areas, and with other programs administered by the U.S. Department of Agriculture (New ERA, PACE), the U.S. Fish and Wildlife

Service, National Oceanic and Atmospheric Administration, the Environmental Protection Agency, U.S. Department of the Interior, the Federal Emergency Management Agency, and Housing and Urban Development.

Catherine received her B.A. in History & B.S. in Political Science and her Master's in Public Administration (MPA) with concentration in political science from Jacksonville State University. She continued her graduate work at Texas A&M University where her dissertation focused on the evolution of bureaucratic structures from colonial governance in North America.

## Pricing

TFG spends the time necessary – and typically much more – to ensure client success. Our retainer contract approach to professional fees provides budget stability for our clients while giving your lobbying team the freedom to concentrate on substantive work and achieving measurable results. As a retainer client, the City of Isle of Palms and the Isle of Palms Water and Sewer Commission will have access to TFG's diverse complement of staff experts that focus on a full range of federal issues. Below are several options, and TFG welcomes the opportunity to work with you to develop the scope of work and pricing structure that works for the City and the Commission.

### Monthly Retainer

**Advocacy Retainer** \$6,000 per month

**Services Provided** The retainer covers the scope of work described above under advocacy, including updates and special reports. This base retainer would also include general communications related to competitive grant opportunities. All retainer clients receive a 15% discount on grant services not covered under the retainer.

**Grants Retainer** \$4,000 per month ([Tier 2.5](#))

**Services Provided** Adding grant services to the monthly retainer would include grant monitoring and reporting, grant training, and general grant guidance and advice. It would also allow the City and the Commission to utilize a dedicated amount of monthly TFG time to help develop strategic plans and funding blueprints (for up to 4 projects), advise on project development and readiness, conduct grant editing and review, or provide general advice on post-award grant management.

**Additional Services** Based on Scope

**Services Provided** Additional [grant services](#) include comprehensive post-award grant management and grant writing. These services are priced based on the grant application's complexity or award. Our current base rate is \$255/hour for retainer clients (\$300/hour for non-retainer clients), but fixed fee options and total project fees are developed case-by-case. TFG would welcome the opportunity to discuss post-award grant management needs and advise on a cost range.

**Combined Advocacy and Grants Retainers** \$8,000 per month (discounted rate)

#### Services Included:

- Full scope of advocacy services, including updates, special reports, and advocacy and communication related to the City and the Commission's federal priorities.
- Full scope of grant services, including grant monitoring and reporting, training, strategic planning, funding blueprints for up to 4 projects, project development advising, grant editing and review, and post-award guidance.

#### Why Choose This Option?

- **Cost Savings:** Combines advocacy and grant services at a discounted rate of \$8,000 per month, providing significant savings compared to individual retainers.
- **Comprehensive Support:** Delivers an integrated approach to both advocacy and grants, ensuring cohesive and strategic service delivery.
- **High Impact:** Optimizes the City and the Commission's ability to secure funding, develop successful projects, and achieve goals efficiently.
- **Best Value:** Recommended by TFG as the option offering the greatest return on investment.

## TFG Approach

TFG's approach to federal lobbying centers on four areas: **Federal Agenda Development, Advocacy, Federal Funding, and Communications**. Our approach incorporates the foundational aspects of our Mission Statement ("Building Stronger Communities") and our Core Values (e.g., Inclusive, Integrity, Excellence, Innovative, Compassion, Client-Focused). TFG professionals have dedicated their careers to working with public agencies like the City of Isle of Palms and the Isle of Palms Water and Sewer Commission and positioning them for success at the federal level. Based on our body of work, experience, and the expert team that would work with the City and the Commission, we are confident that we can help the City and the Commission achieve the goals that motivated your respective interests in federal representative services. There are few independent lobbying firms whose primary focus is advocating for local governments. TFG analyzes all federal action through the lens of local government. The unmatched success we have achieved on our clients' behalf since 1982 speaks volumes to our commitment to local communities and capacity to help clients achieve transformative success.

TFG helps our clients access congressional leadership and decision-makers in federal agencies to achieve their goals. A major reason for our continued success is our belief that TFG should operate as an extension of your staff, serving as your guide and liaison in Washington, D.C. Having a firm understanding of your needs allows us to meet with your congressional delegation and the Executive Branch on your behalf and provide them with a comprehensive picture of the City and the Commission and your unique needs. Our comprehensive approach to representing our clients is why we are some of Washington, DC's most trusted and respected federal advocates.

## Federal Agenda Development

**Conduct Strategic Assessment of Opportunities.** TFG will meet with City and the Commission's management, elected leadership, staff, and partners to learn about your priorities and help to refine the City and the Commission's goals and objectives further. These meetings and ongoing future communications will allow us to develop an in-depth understanding of priority issues and projects. TFG will work off that initial work plan while developing a robust Federal Agenda based on feedback from management and elected council and commission members. We would continue to explore existing and emerging priorities to ensure that the City and the Commission are well-positioned to take advantage of all current and future opportunities and that you are aware of any potential threats to your interests.

**Develop Federal Agenda and Strategy.** Throughout the early months of our relationship, TFG will develop a Federal Agenda outlining the City and the Commission's legislative, regulatory, and priority project needs and objectives. This agenda will be developed through conversations with the City and the Commission's local elected officials, department heads, and strategic partners to reflect the City and the Commission's larger goals. These conversations can occur through in-person visits with the City and the Commission and virtual meetings. In either case, conversations with City and Commission officials will allow TFG to understand better the critical issues you face and how best to address each one. Once developed, the Federal Agenda and strategy can be updated regularly to better reflect the ongoing realities facing the City and Commission or those in Washington, D.C.

## Advocacy

**Initial Advocacy Outreach.** TFG will brief the City and the Commission's congressional delegation on your priorities, providing a written Federal Agenda and related briefing materials to educate them on the City and the Commission's short- and long-term goals.

**Effective Bipartisan Advocacy.** TFG strongly believes in a bipartisan approach to federal advocacy; most community needs and issues are not partisan. This approach enables our firm and clients to smoothly transition into working with whichever party holds the majority. We work cooperatively within a state's congressional delegation. Having represented public agencies in Washington for 42+ years, our professionals have experienced major shifts in political leadership, both in the White House/federal agencies and in Congress. Furthermore, Members of Congress and their staff come and go. As a matter of course, we introduce ourselves to new House Members/Senators and their staff early in their terms and offer our counsel and expertise to them. This practice engenders trust and respect that significantly benefits our clients.

The City and Commission's lobbying team will operate as an extension of the City and Commission staff, serving as a liaison with Congress and the federal agencies. Additionally, we work as an extension of a Member of Congress's staff, helping congressional offices address local priorities. Congressional staff are extremely busy, and we do our best to give them the support they need to help achieve our clients' goals. This includes, for example, drafting letters of support from the Member/Senator, providing talking points for a call to a federal agency, providing questions for Members to ask during congressional hearings, and educating and advising staff on priority issues and proposed courses of action.

**Relationships.** The City and Commission’s advocacy team has productive working relationships with Senators Tim Scott and Lindsey Graham. Those relationships have been fostered in our representation of several South Carolina interests, including the Towns of Cheraw and Mount Pleasant, as well as the Beaufort-Jasper Water & Sewer Authority.

In addition to offices representing South Carolina, TFG has relationships with key congressional committee chairpersons and staff, administration officials within the Executive Office of the President, and key appointed officials and civil servants within many of the federal agencies. As you know, many federal programs work with state administering agencies to distribute federal funds. Having worked with several South Carolina communities, we have knowledge of the state agencies of interest to the City and Commission. We are also experts at working in partnership with other local governments and/or their federal lobbyists to achieve a common goal.

TFG has relationships with stakeholder groups, trade associations, and issue-oriented coalitions, which helps us stay engaged on issues of interest to our clients. For example, we maintain relationships with key staff at the National Association of Counties (NACo), the U.S. Conference of Mayors (USCM), the National League of Cities (NLC), the Government Finance Officers Association (GFOA), and the National Association of Telecommunications Officers and Advisors (NATOA).

TFG is a Strategic Partner of the International City/County Management Association (ICMA) and presents at its annual conference. At this year’s conference in Pittsburgh, TFG representatives hosted a session, *“Riding Washington’s Waves: A Playbook for Securing Federal Funding in an Election Year and Beyond.”* TFG is a “Friend of NACA” (National Association of County Administrators) and attends its meetings during the ICMA and NACo conferences to provide federal updates to members. TFG professionals also serve on the Public Finance Network run by GFOA.

These relationships keep us actively involved in the development of legislation and regulations impacting town governments throughout the country. Leveraging these contacts, TFG can help enhance the City and the Commission’s existing relationships.

**Legislative and Regulatory Services.** TFG will steer the City and the Commission’s legislative priorities through the entire legislative process, including bill drafting and introduction, committee hearings, markups, amendments, and votes. We will ensure that you push your legislative priorities at the appropriate and most impactful time. We also work with interested clients to serve as witnesses in hearings on Capitol Hill and assist in preparing testimony for those hearings. TFG will represent the City and Commission during and outside of congressional and regulatory meetings and apprise you of important updates, including potential revisions of legislation of interest or opportunities to contribute input for federal rulemakings.

TFG monitors legislative and regulatory actions and provides timely updates to our clients. We will inform the City and Commission of any new legislation relevant to your priorities. We will help the City and Commission engage directly in the legislative and regulatory processes to ensure your support and/or concerns are known by key decision-makers. For example, TFG is working with the Public Finance Network (PFN), which is led by the GFOA, as Congress gears up for tax bills in 2025. Many of the tax provisions included in the 2017 Tax Cuts and Jobs Act are expiring next year, so tax legislation will be a top priority. The PFN is working with local governments nationwide to collect data on the usage and importance of tax-exempt municipal bonds. TFG could work with the City and Commission to identify changes to the tax code and ensure your interests are supported and protected.

TFG develops legislative and policy trackers at a client's request providing updates on priority legislation and regulations. These trackers provide summaries of relevant bills and notes of the support status of the Members of your congressional delegation. TFG has a dedicated Legislative and Policy Director charged with monitoring and tracking legislative and regulatory actions that can be advantageous or detrimental to our clients' priorities. The Director works with client managers to engage directly in the legislative and regulatory processes to ensure our clients' voices are represented. In addition to drafting letters to relevant federal agencies, committees, and Members of Congress, TFG will provide talking points for calls to relevant offices and help the City and Commission engage in advocacy on social media platforms.

**Advocacy Meetings.** TFG practices a cooperative team approach in which the City and Commission are an integral part of the education and advocacy process in Washington, D.C. We are committed to helping you become your own best advocate and will work closely with you to identify the best timing, audience, and message when you are in Washington, D.C., or meeting with officials and staff located in Minnesota and western regional federal offices. TFG will make all arrangements for the most effective use of your time, resources, and effort. We will coordinate meetings with Members of the City and the Commission's congressional delegation, other targeted Members of Congress, congressional and committee leadership, and key federal agencies where it is important to raise the City and the Commission's profile and to advocate effectively for the goals and objectives included in your Federal Agenda. We personally guide you through these visits to Washington, D.C., assist with related logistics, and provide all the necessary follow-up.

## Federal Funding

TFG will support the City and Commission to ensure that all relevant funding opportunities are explored for priority projects and initiatives identified in your Federal Agenda, including federal, state, and foundation grants, the federal appropriations process, and new programs under the *Infrastructure Investment and Jobs Act (IIJA)* and the *Inflation Reduction Act (IRA)*. TFG draws upon decades of experience to determine the best course of action to pursue funding assistance for a project or program.

**Budget and Appropriations.** TFG will help position the City and Commission to engage in the annual budget and appropriations processes. This process typically begins during the early months of a new year, during which TFG will assist you in identifying appropriate projects and developing strategic advocacy plans to see those projects included in the final appropriations spending bills. As previously mentioned, TFG clients have secured nearly \$300 million in earmarked congressional appropriations.

**Authorizations.** Another way to fund local priority projects is through authorizing legislation. TFG has extensive experience in creating new legislative authorizations, accessing funds through existing authorities, and working with our clients to influence the reauthorization of existing legislation. As noted previously, on behalf of our clients with water resource needs, TFG helped draft and advocate for legislative language that created a new Water Infrastructure Finance and Innovation Act (WIFIA), a program that allows entities to participate in financing opportunities with the Environmental Protection Agency (EPA) that are affordable and fit their needs.

Authorizations mainly act as a "permission slip" for the relevant federal agency by providing congressional approval for the agency to direct resources to specific programs or projects. TFG will work with the City and the Commission's delegation and the staff on relevant authorizing committees to ensure the City and Commission's priorities are supported in as many ways as possible by the federal government.



**Project Development and Readiness.** TFG’s long history of working with a wide variety of funding programs, established relationships, and understanding critical timelines allows us to help clients prepare in advance for upcoming congressional funding opportunities and competitive grant opportunities. Our experience and relationships with Members of Congress, particularly the City and Commission’s Congressional Delegation, allow us to assess and vet your funding priorities prior to submission for consideration by Congress. Our relationships within those offices also allow us to target requests to offices with specific internal interests and requirements. These vetting processes also allow us to ensure that the City and the Commission’s resources are used as effectively as possible and not spread across multiple priorities with lesser chances of success. We also have unmatched experience with competitive federal grant programs, and we will help the City and Commission determine whether a project is a good fit and ready for a federal grant effort.

Once a specific project is identified as a funding priority, TFG will work with City staff to strategically develop advocacy plans and ensure those priorities continue to meet the requirements of Congress and, in the case of competitive grants, the current goals of the administration. These processes will ensure that your requests are positioned to be highly competitive in a space where many other individuals and groups are vying for the same pots of money.

Even the strongest project requests must show support from outside groups or individuals to successfully compete for funding through the congressional funding process. TFG’s process may involve building partnerships with other local or regional organizations, expanding or limiting the scope of a project request, and assisting you in cultivating the necessary letters of support for your project to meet the interests and requirements of Congress.

As appropriate, TFG can also arrange conference and video calls, or in-person meetings with congressional staff and key Administration officials to solicit feedback on projects prior to our eventual submission. All these activities will be coordinated in conjunction with the City and Commission.

**Competitive Grants.** TFG will keep you informed about relevant competitive grant opportunities and secure political support for grant applications. As outlined in the Pricing section, TFG also offers additional grant services, such as grant writing and administration, that can be added to a general advocacy agreement. Grant research, identification, and strategic preparation are included in an advocacy retainer.

Once priority projects are identified by the City and Commission, TFG can conduct robust grant funding research to identify relevant grant opportunities. TFG will provide a grant guide/report highlighting select grant programs that would support the City and the Commission’s priorities. This report includes relevant information on eligibility, match requirements, and other program-specific information required to prioritize funding opportunities. TFG regularly provides updated information on new grant opportunities via your client manager and TFG’s Weekly Grants Update.

When possible, we provide our clients with samples of past winning applications. TFG has a database of over 2,000 successful grant applications from a variety of programs to help inspire and guide the preparation of any anticipated grant submission. Reviewing past applications also allows TFG to identify trends in funded projects that can help frame the City and the Commission’s projects in future applications. TFG recently launched the online “TFG Grants Showcase,” which gives clients direct access to all grants research and successful grant applications.

**Grant Writing Support and Advocacy.** TFG’s team will support the City and Commission to explore all relevant competitive grant opportunities. As mentioned, our professional services contracts include grant



consulting services, including grant research, identification, and strategic preparation. Grant writing and administration services handled separately.

For all grant applications, TFG works collaboratively with our clients to review and strengthen grant narratives, ensure that all required information and documents are included in application submittals, and ensure that budget narratives and related documents properly support the application. We will also help secure letters of support from your congressional representatives and other strategic partners to bolster grant applications. In addition, we keep in contact with grant program managers to make sure we are aware of when awards will be announced. We also consult on grant administration, helping to ensure our clients make the best and proper use of grant funds and meet reporting requirements.

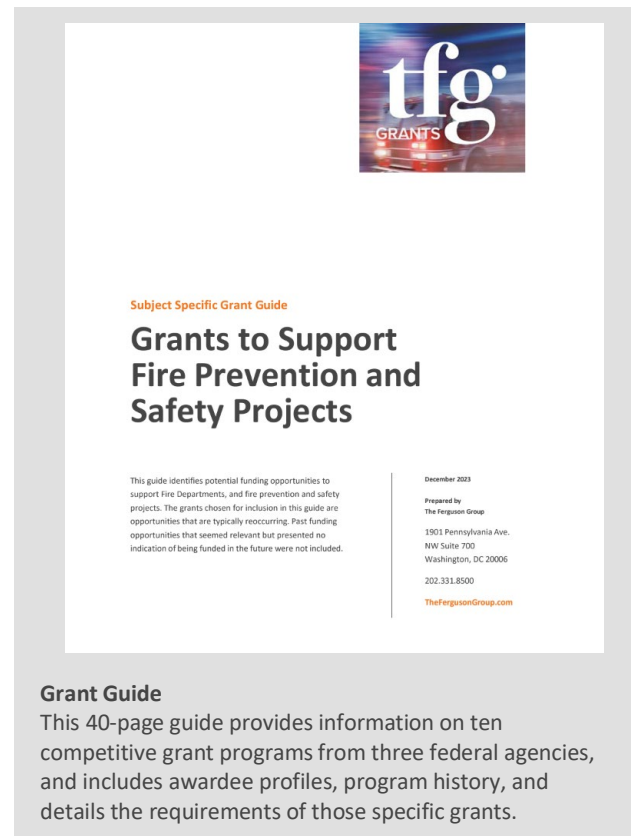
**Grants Training.** TFG offers basic grants training to our clients to position local staff for success in the often-complex grants process.

**Post-Award Grant Management Services.** TFG’s support extends well beyond grant submission with our comprehensive Post-Award Grant Management Services, available on a case-by-case basis, to provide expert guidance in managing grant awards once received. Our post-award services encompass all aspects of grant administration, including oversight of fund allocation, detailed compliance tracking, and regulatory reporting, all tailored to simplify the management process. With TFG handling these critical responsibilities, your team can focus fully on achieving the project’s intended impact, confident that all regulatory requirements are met and funds are managed responsibly. This ongoing support ensures that grant funds are fully leveraged, supporting long-term project success and community benefits.

## Communications Examples

Regular and efficient communication is essential to successful working relationships with our clients. TFG takes pride in our client communications, and we are always looking for new and innovative ways to provide critical information to our clients and keep them “in the know.” TFG will work with City staff to ensure relevant individuals receive TFG’s regular updates and special reports.

**Frequent Updates.** TFG will provide designated City staff with updates on activities related to your priorities. We will provide monthly, quarterly, and/or year-end reports as requested by the City and Commission regarding each priority project and your federal workplan. Updates also include regularly scheduled conference calls with City staff. In addition, TFG will be available to attend Isle of Palms Council meetings one or more times each year – either in-person or virtually – to



The image shows the cover of a grant guide. At the top right is the TFG logo with the word 'GRANTS' underneath. The title 'Grants to Support Fire Prevention and Safety Projects' is prominently displayed in the center. Below the title, there is a small paragraph of text and a vertical line of contact information on the right side, including the date 'December 2023' and the company name 'The Ferguson Group'.

### Grant Guide

This 40-page guide provides information on ten competitive grant programs from three federal agencies, and includes awardee profiles, program history, and details the requirements of those specific grants.

provide updates and discuss federal action relative to your priorities, emerging opportunities, and potential threats if they arise.

**Issue Briefs and Grant Summaries.** TFG will provide regular status reports and updates on important issues and projects. In addition, other personalized reports that we will regularly provide to the City and Commission include:

- Policy issue briefs that provide historical background and new developments on regulatory and administrative issues.
- Real-time updates on federal legislation and issues that may impact or be of interest to the City and Commission.
- Grant summaries and profiles that provide tips on how to be successful in the grant process.
- Topic-specific funding guides that review available funding opportunities.

Pictured here is a TFG-produced grant guide for fire prevention and safety projects. TFG develops comprehensive grant guides detailing the numerous programs available to local governments for their many needs.

**Weekly Updates and Special Reports.** In addition to personalized updates from your advocacy team, City officials and staff benefit from the following communications:

- Weekly [Legislative Update and Outlook](#)
- Weekly [Grants Update](#)
- Weekly [Transportation Notes](#)
- Weekly [Water and Natural Resources Update](#)
- Biweekly [Infrastructure Funding Bulletin](#)
- Biweekly [“Interconnect”](#) Newsletter focused on broadband, telecom, and cybersecurity

Finally, TFG develops comprehensive reports on major events happening in Washington. For example, TFG prepared Special Reports on the [Infrastructure Investment and Jobs Act](#), the Inflation Reduction Act, and the American Rescue Plan Act. We tailor our reports to focus on specific issues and areas of importance to our clients. TFG takes great pride in our ability to keep our clients apprised of all relevant activity in Washington, D.C., in an efficient and timely manner.

## **surfing Applicants' Location Requests**

Bowers – 34A

DePass – 26<sup>th</sup>

Antman – 21<sup>st</sup>

Granigan – 8<sup>th</sup>

Busey – 6<sup>th</sup>



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
04/09/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Sadler & Company, Inc.  3014 Devine Street, Columbia, SC, 29250	CONTACT NAME:	
	PHONE (A/C, No, Ext): 800-622-7370	FAX (A/C No): 803-256-4017
	E-MAIL ADDRESS: sport7@sadlerco.com	
	PRODUCER CUSTOMER ID :	
	INSURER(S) AFFORDING COVERAGE	
INSURED Sports Marketing Program Management Inc. Philip Neal LLC dba Salt Marsh Surf Co.  1338 Ronald Lane Charleston, SC, 29412	INSURER A : Texas Insurance Company	16543
	INSURER B :	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES CERTIFICATE NUMBER: A-SP-SU-24-04-02-301806 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MMDD/YYYY)	POLICY EXP (MMDD/YYYY)	LIMITS	
A	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> INCLUDES ATHLETIC PARTICIPANTS  GENERAL AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC	Y	N	BESGLPTNV011301_170012_02	04/09/2024	04/09/2025	EACH OCCURRENCE	\$ 1,000,000.00
							FIRE DAMAGE TO PREMISES RENTED (Any one premises)	\$ 300,000.00
							MED EXP (any one person)	\$ 5,000.00
							PERSONAL & ADV INJURY	\$ 1,000,000.00
							GENERAL AGGREGATE	\$ 3,000,000.00
							PRODUCTS - COMP/OP AGG	\$ 2,000,000.00
								\$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS						COMBINED SINGLE LIMIT (Ea accident)	\$
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE  DEDUCTIBLE RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
								\$
	<b>WORKERS COMPENSATION AND EMPLOYERS LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N (Mandatory in NH) If yes, describe under SPECIAL PROVISIONS below		N/A				WC STATUTORY LIMITS	OTHER
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$
A	<b>OTHER</b> Abuse/Molestation	Y	N	BESGLPTNV011301_170012_02	04/09/2024	04/09/2025	Each Occurrence: \$ 25,000.00	Aggregate: \$ 50,000.00

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
Liability Policy Deductible: \$0.00 Deductible for Bodily Injury and \$ 1000.00 per Property Damage Claim. ISO Occurrence form CG 00 01 04 13 and company's specific forms. Coverage for Participant Legal Liability requires that every participant signs a waiver/release. The certificate holder is named as Additional Insured with respect to (continued on next page)

**CERTIFICATE HOLDER****CANCELLATION**

City of Isle of Palms 1207 Palm Blvd. Isle of Palms, SC, 29451	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE  Mark Di Perno

AGENCY Sadler & Company, Inc.		NAMED INSURED Philip Neal LLC dba Salt Marsh Surf Co.	
POLICY NUMBER BESGLPTNV011301_170012_02		1338 Ronald Lane Charleston, SC, 29412	
CARRIER Texas Insurance Company	NAIC CODE 16543	EFFECTIVE DATE: 04/09/2024	

**ADDITIONAL REMARKS**

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance**

negligent acts or omissions of the Named Insured and only with respect to the Operations of the Insured during the coverage period.  
RE: Registered Surfing participants: 04/09/2024 - 04/09/2025;

CERTIFICATE NO : 00270896

**LIFEGUARD+**  
**CERTIFICATES**

# **CPR & FIRST AID**

## **CERTIFICATE OF COMPLETION**

THIS IS TO PROUDLY CERTIFY:

**PHILIP ANTMAN**

**01/22/2025**

For completing their CPR & First Aid Training with [lifeguardcertificates.com](http://lifeguardcertificates.com) on Wed Jan 22 2025 valid for 1 year from the date of completion.

JESSICA REYES  
Instructor



LIFEGUARDCERTIFICATES  
Course Provider



SCAN THIS QR CODE OR VISIT  
USALIFEGUARDASSOCIATION.ORG  
TO VERIFY THE AUTHENTICITY  
OF YOUR CERTIFICATE.

**LIFEGUARD+**  
**CERTIFICATES**

# LIFEGUARD

## CERTIFICATE OF COMPLETION

THIS IS TO PROUDLY CERTIFY:

# PHILIP ANTMAN

7869807853788-1

For completing their Lifeguard Training with [lifeguardcertificates.com](http://lifeguardcertificates.com) on Wed Jan 22 2025  
valid for 1 year from the date of completion.

REBECCA LOWES  
Instructor



LIFEGUARDCERTIFICATES  
Course Provider



**APPLICATION: A-SP-SI-24-03-12-299744**

**INSURED'S CONTACT INFORMATION**

Contact Name	Monica Becerra
Contact Phone	8439730078
Contact Email	<a href="mailto:mbecerra18921@gmail.com">mbecerra18921@gmail.com</a>

**ESTABLISHMENT**

Named Insured	Share The Stoke
Address	304 Fleming Rd
City	Charleston
State	South Carolina
Zip code	29412
Country	United States
Website	<a href="http://sharethestokesurfboardrentals.com">sharethestokesurfboardrentals.com</a>
Form of Business	Limited Liability Company
Employee/Volunteers	1
Do you have any activities outside of the United States?	No
Event Location	Isle of Palms, South Carolina

**COVERAGE PERIOD AND ACTIVITIES**

Policy Effective Date	04/01/2024
Policy Expiry Date	03/31/2025

**ACTIVITIES**

**ACTIVITY(1)**

Sport/Activity	Surfing
Level	Amateur
Category	Lessons

**Please specify the Total Number of Participants and Coaches/Officials/Volunteers for the policy duration for each of the following indicated age groups (Estimate where exact numbers are unavailable)**

Coaches/Volunteers/Board Members	1
Total number of registered Participants 12 and under	20
Total number of registered Participants 13-15	20
Total number of registered Participants 16-19	20
Total number of registered Participants 20 and older	20



Will participants be taking more than one lesson?	Yes
What is the average number of lessons per participant?	1 lesson(s)
Will participants stay overnight?	Participants don't stay overnight

**Please describe the operations/activities to be insured:  
Please note: Insurance will ONLY cover activities specified above (or on your Insurance Quotation) and no additional activities mentioned below will be covered.**

Surf lessons and surfboard rentals	
Do you have rentals ?	Yes
What percentage of revenue comes from rentals?	5%

### NON-ATHLETIC FUNDRAISING ACTIVITY

Does your organization hold any <b>Non-Athletic</b> Participant fundraising activities?	No
---	----

### GENERAL INFORMATION

What type of security will you be using?	None
Maximum number of spectators at any individual event or location	1
Estimated Gross Receipts	\$100.00
Desired Acc Med Deductible	\$100.00
Desired Acc Med Benefit (\$25,000 is standard. Higher limits result in a higher premium cost)	\$25,000.00
Do you offer Temporary Child Supervision?	No
Will you be using any, pyrotechnics, or use of mechanical devices that will be ridden (excluding sporting equipment)?	No
Does any volunteer, owner, coach or official have a criminal record, or has ever had a criminal record?	No
Have you had any claims in the past five (5) years?	No
Have you ever filed for bankruptcy?	No
Have you ever had insurance Cancelled, or Non Renewed for any reason?	No
Does the applicant use a waiver and release?	Yes

**Please note that the use of a waiver is mandatory for insurance coverage. For your protection we recommend having your waiver prepared / approved by your legal council.**

### ADDITIONAL INSURED

Would you like to add Additional Insured?	Yes
---	-----

### Additional insured (1)

AI name	City of Isle of Palms
Address	1207 Palm Blvd
City	Isle of Palms
State	SC
Zip/Postal code	29451
Country	United States
Contact Name	
Phone Number	

E-mail

---

Type of Business:	<input checked="" type="checkbox"/> Government/Municipality	<input type="checkbox"/> Sponsor
	<input type="checkbox"/> Sub-Contractor	<input type="checkbox"/> Beneficiary/Charity
	<input type="checkbox"/> Venue/Facility	<input type="checkbox"/> Landowner
	<input type="checkbox"/> Association Member	<input type="checkbox"/> Landlord
	<input type="checkbox"/> Other	

---

**\*Note: The SI rep facing application, that is presented in the body of this email, does not include the list of requested additional insured's. This is due to the size of the additional insured list (1 AIs). To see the list of additional insured's please open the application document.**

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## OPTIONAL COVERAGE

Basic Coverage Summary

### Individuals Covered

All players, managers or coaches of the Policy holder

### Activities Covered

While participating as a member of the team in a scheduled game, an official tournament game, or in a practice session of the team.

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## ABUSE/MOLESTATION COVERAGE

**This endorsement covers the LEGAL COSTS TO DEFEND AGAINST the accusation OF ABUSE OR MOLESTATION against a member of your organization.**

Basic Abuse/Molestation Coverage of **\$25,000 per occurrence / \$50,000 aggregate is included** in the base General Liability Package.

Higher COVERAGE Limits FOR Abuse / Molestation can be added for an additional premium as indicated below:

Abuse/Molestation Coverage (Optional) (Higher Limits) NOT REQUIRED

---

**\* May be more, depending on number of participants. Additional premium Fully Earned at Policy Inception. Premium does not include taxes and fees.**

**\*\* Background checks required.**

---

## Excess Liability Coverage

Basic Liability Coverage of **\$1,000,000 per occurrence / \$3,000,000 aggregate is included** in the base General Liability Package.

Follow-Form Excess Liability Coverage with the following Per Occurrence / Aggregate limits can be added for an additional premium as indicated below:

Excess Liability Coverage (Optional) NOT REQUIRED

---

**\* May be more, depending on coverage period and number of participants. Fully Earned at Policy Inception. Premium does not include taxes and fees.**

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## HIRED NON OWNED AUTO COVERAGE

Any bodily injury and property damage arising out of the transportation of participants is excluded.

Follow-Form HNOA Coverage with the following limits can be added for an additional premium as indicated below:

---

NOT REQUIRED

Hired/Non Owned Auto Liability Coverage

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**\* May be more, depending on coverage period and number of participants. Fully Earned at Policy Inception. Premium does not include taxes and fees.**

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**Virtual Online Training/Coaching/Instruction (Optional)**

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Do you provide virtual online training/coaching/instruction? No

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**\* Additional Premium.**

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**LIQUOR LIABILITY COVERAGE**

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Please note Liquor Liability coverage is required if you are selling alcohol

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Are you selling alcohol? No

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**DECLARATION**

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**IMPORTANT NOTICE**

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Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance may result in an insurance claim being denied by the insurer.

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**Declaration**

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To the best of my knowledge and belief all statements made in this Application for Insurance are true. Agreeing electronically to this document does not bind the Applicant to purchase the insurance, but it is agreed that this Application shall be the basis of the contract, should a policy be issued. In order to complete your application and receive a quotation, please indicate your agreement below with a YES.

---

The customer has agreed electronically Yes

---

**American  
Lifeguard  
Association**



[www.americanlifeguard.com](http://www.americanlifeguard.com)

**The American Lifeguard  
Association®**

*has trained over  
250,000 individuals  
since 1990.*

*Our goal is to improve  
the quality and  
accessibility of  
Health & Safety*

**Member No: MONMOW101896**

**Issue Date: 01/08/2025**

**American Lifeguard & Safety Training™**

**Monica  
Mowers**

**Date of Birth 10/18/1996**  
(mm/dd/yyyy)

**GLOBAL**

**FEGUARD**



**Qualification**

Professional Lifeguarding  
Shallow Water Lifeguarding  
Waterfront Lifeguarding  
Swimming Pool Operator  
CPR/AED for the Professional Rescuer  
Community First Aid  
Aquatic First Responder

**Certification issued by:**  
**American Lifeguard Assoc.**  
**8300 Boone Blvd.,**  
**5th Floor**  
**Vienna, VA 22182**



For  
Verification  
go to:

**[www.universalcertification.org](http://www.universalcertification.org)**

Valid for 2 years with Employer's Model Aquatic Health Code compliance.

**Date of Completion**

01/08/2025

01/08/2025  
01/08/2025



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
04/01/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> SportsInsurance.com  P.O. Box 1155, Lake Placid, NY, 12946	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): 1-866-889-4763      FAX (A/C No):		
	E-MAIL ADDRESS: info@sportsinsurance.com <b>PRODUCER CUSTOMER ID :</b>		
<b>INSURED</b> Sports Marketing Program Management Inc. Share The Stoke Surfboard Rentals  304 Fleming Rd Charleston, SC, 29412	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	<b>INSURER A :</b> Accelerant Specialty Insurance Company		16890
	<b>INSURER B :</b>		
	<b>INSURER C :</b>		
	<b>INSURER D :</b>		
	<b>INSURER E :</b>		

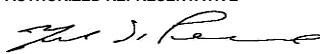
**COVERAGES**      **CERTIFICATE NUMBER:** A-SP-SI-25-01-21-328866\_345226      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MMDDYYYY)	POLICY EXP (MMDDYYYY)	LIMITS	
A	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> INCLUDES ATHLETIC PARTICIPANTS  GENERAL AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC	Y	N	S0019GL000001-04	04/01/2025	03/31/2026	EACH OCCURRENCE	\$ 1,000,000.00
							FIRE DAMAGE TO PREMISES RENTED (Any one premises)	\$ 300,000.00
							MED EXP (any one person)	\$ 5,000.00
							PERSONAL & ADV INJURY	\$ 1,000,000.00
							GENERAL AGGREGATE	\$ 3,000,000.00
							PRODUCTS - COMP/OP AGG	\$ 2,000,000.00
								\$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS						COMBINED SINGLE LIMIT (Ea accident)	\$
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE  DEDUCTIBLE RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
								\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under SPECIAL PROVISIONS below	Y/N					WC STATUTORY LIMITS	OTH-ER
		N/A					E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$
A	<b>OTHER</b> Abuse/Molestation	Y	N	S0019GL000001-04	04/01/2025	03/31/2026	Each Occurrence: \$ 25,000.00	Aggregate: \$ 50,000.00

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
Liability Policy Deductible: \$0.00 Deductible for Bodily Injury and \$ 1000.00 per Property Damage Claim. ISO Occurrence form CG 00 01 04 13 and company's specific forms. Coverage for Participant Legal Liability requires that every participant signs a waiver/release. The certificate holder is named as Additional Insured with respect to (continued on next page)

**CERTIFICATE HOLDER**      **CANCELLATION**

City of Isle of Palms 1207 Palm Blvd Isle of Palms, SC, 29451	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  <b>AUTHORIZED REPRESENTATIVE</b>  <b>Mark Di Perno</b>
---	--

AGENCY SportsInsurance.com		NAMED INSURED <b>Share The Stoke Surfboard Rentals</b>	
POLICY NUMBER S0019GL000001-04		304 Fleming Rd Charleston, SC, 29412	
CARRIER Accelerant Specialty Insurance Company	NAIC CODE 16890	EFFECTIVE DATE: 04/01/2025	

**ADDITIONAL REMARKS**

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,**  
**FORM NUMBER:** 25 **FORM TITLE:** Certificate of Liability Insurance

---

negligent acts or omissions of the Named Insured and only with respect to the Operations of the Insured during the coverage period.  
RE: Registered Surfing participants: 04/01/2025 - 03/31/2026;



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/16/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER K&K Insurance Group, Inc. 1712 Magnavox Way Fort Wayne IN 46804	CONTACT NAME: SCU - Outfitters & Guides	
	PHONE (A/C, No, Ext): 1-877-783-1161	FAX (A/C, No): 1-260-459-5502
	E-MAIL ADDRESS: OandG@kandkinsurance.com	
	PRODUCER CUSTOMER ID:	
	INSURER(S) AFFORDING COVERAGE	NAIC #
INSURED Carolina Salt Surf Lessons, LLC DBA: Charleston Paddle Board Co. 1111 Oak Crest Dr Charleston, SC 29412 A Member of the Sports, Leisure & Entertainment RPG	INSURER A:	Markel Insurance Company
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

## COVERAGES

CERTIFICATE NUMBER: W02700386

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input checked="" type="checkbox"/> OTHER: MEMBER	X		M1RPA0000500002100	05/16/2024 10:53 AM EDT	05/16/2025 12:01 AM	EACH OCCURRENCE	\$1,000,000
							DAMAGE TO RENTED PREMISES (Ea Occurrence)	\$300,000
							MED EXP (Any one person)	EXCLUDED
							PERSONAL & ADV INJURY	\$1,000,000
							GENERAL AGGREGATE	\$5,000,000
							PRODUCTS - COMP/OP AGG	\$1,000,000
							PROFESSIONAL LIABILITY	
							BODILY INJURY TO PARTICIPANTS	
							COMBINED SINGLE LIMIT (Ea accident)	
							BODILY INJURY (Per person)	
							BODILY INJURY (Per accident)	
							PROPERTY DAMAGE (Per accident)	
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION						EACH OCCURRENCE	
							AGGREGATE	
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/ EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> If yes, describe under DESCRIPTION OF OPERATIONS below	N/A					<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER	
							E.L. EACH ACCIDENT	
							E.L. DISEASE - EA EMPLOYEE	
							E.L. DISEASE - POLICY LIMIT	
	MEDICAL PAYMENTS FOR PARTICIPANTS						PRIMARY MEDICAL	
							EXCESS MEDICAL	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Bicycle Rental - Non Stand-Alone, Paddling/Paddleboarding (includes stand-up paddleboarding), Retail Sales (must be 80% or less of total revenues), Surfing  
 Certificate holder is added as an additional insured, but only for liability caused, in whole or in part, by the acts or omissions of the named insured. Coverage does not extend to the negligence or errors & omissions of the additional insured.

## CERTIFICATE HOLDER

Test  
 Test  
 Colorado Springs, CO 80918  
 (Permit Grantor)

## CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Coverage is only extended to U.S. events and activities.

\*\* NOTICE TO TEXAS INSURED: The Insurer for the purchasing group may not be subject to all the insurance laws and regulations of the State of Texas

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

**ADDITIONAL INSURED – STATE OR GOVERNMENTAL  
AGENCY OR SUBDIVISION OR POLITICAL  
SUBDIVISION – PERMITS OR AUTHORIZATIONS**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

**SCHEDULE**

**State Or Governmental Agency Or Subdivision Or Political Subdivision:**

Per USDA Forest Service assigned National ID Number.

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

**A. Section II – Who Is An Insured** is amended to include as an additional insured any state or governmental agency or subdivision or political subdivision shown in the Schedule, subject to the following provisions:

- 1. This insurance applies only with respect to operations performed by you or on your behalf for which the state or governmental agency or subdivision or political subdivision has issued a permit or authorization.

However:

- a. The insurance afforded to such additional insured only applies to the extent permitted by law; and
- b. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

2. This insurance does not apply to:

- a. "Bodily injury", "property damage" or "personal and advertising injury" arising out of operations performed for the federal government, state or municipality; or
- b. "Bodily injury" or "property damage" included within the "products-completed operations hazard".

**B. With respect to the insurance afforded to these additional insureds, the following is added to Section III – Limits Of Insurance:**

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

- 1. Required by the contract or agreement; or
- 2. Available under the applicable Limits of Insurance shown in the Declarations;

whichever is less.

This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.



**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

**EARLIER NOTICE OF CANCELLATION  
PROVIDED BY US**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART  
LIQUOR LIABILITY COVERAGE PART  
POLLUTION LIABILITY COVERAGE PART  
PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART

**SCHEDULE**

**Number of Days' Notice** Minimum 30 Days or Days per Certificate on file with K&K Insurance Group.

(If no entry appears above, information required to complete this Schedule will be shown in the Declarations as applicable to this endorsement.)

For any statutorily permitted reason other than nonpayment of premium, the number of days required for notice of cancellation, as provided in paragraph 2. of either the CANCELLATION Common Policy Condition or as amended by an applicable state cancellation endorsement, is increased to the number of days shown in the Schedule above.

Named Insured: Carolina Salt Surf Lessons, LLC  
DBA: Charleston Paddle Board Co.  
Effective Date: 05/16/2024

Per USDA Forest Service assigned National ID Number.



**American Red Cross**  
Training Services

## Certificate of Completion

Kyle Busey

has successfully completed requirements for

**Lifeguarding with CPR/AED for Professional Rescuers and First Aid**

Date Completed: 2/10/2023  
Validity Period: 2 Years

Conducted by: City of Charleston Recreation



To verify certificate, scan code or visit [redcross.org/digitalcertificate](https://redcross.org/digitalcertificate) and enter ID.

Learn and be inspired at [LifesavingAwards.org](https://LifesavingAwards.org)



014192G



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
01/22/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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<b>PRODUCER</b> Verify Insurance Services, LLC DBA Thimble Insurance Services 174 West 4th Street, Suite 204 New York, NY 10014 <a href="https://support.thimble.com/">https://support.thimble.com/</a>	<b>CONTACT NAME:</b> THIMBLE <a href="https://support.thimble.com/">https://support.thimble.com/</a>
	<b>PHONE (A/C, No, Ext):</b> _____ <b>FAX (A/C, No):</b> _____
	<b>E-MAIL ADDRESS:</b> support@thimble.com
	<b>INSURER(S) AFFORDING COVERAGE</b> <span style="float: right;">NAIC #</span>
	<b>INSURER A:</b> National Specialty Insurance Company <span style="float: right;">22608</span>
	<b>INSURER B:</b> _____
	<b>INSURER C:</b> _____
	<b>INSURER D:</b> _____
	<b>INSURER E:</b> _____
	<b>INSURER F:</b> <a href="https://www.thimble.com/check-policy-status/">https://www.thimble.com/check-policy-status/</a>

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.


INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER: _____	Y	Y	IBL-P35GX8ZT3J	04/19/2025 12:00 AM EDT	05/18/2025 11:59 PM EDT* See note on expiration date below.	EACH OCCURRENCE \$ 1,000,000
	DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000						
							MED EXP (Any one person) \$ 5,000
							PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 1,000,000
							PRODUCTS - COMP/OP AGG \$ 1,000,000
							\$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$
							BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
	<input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED _____ RETENTION \$ _____						EACH OCCURRENCE \$
							AGGREGATE \$
							\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N <input type="checkbox"/> N/A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE OTH-ER
							E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
							\$
							\$
							\$
							\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

\*Please note that the insured has purchased a monthly policy that will automatically extend upon expiration of the policy if the insured pays the appropriate premium. At that time, you will receive a new Certificate of Liability Insurance, evidencing such extension.

(con't on form Acord 101)

**CERTIFICATE HOLDER** **CANCELLATION**

The City of Isle of Palms desireef@iop.net	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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**ADDITIONAL REMARKS SCHEDULE**

AGENCY Verify Insurance Services, LLC DBA Thimble Insurance Services		NAMED INSURED IOPSurfLessons 28 26th Ave, Isle of Palms, SC, 29451 iopsurflessons@gmail.com	
POLICY NUMBER IBL-P35GX8ZT3J		EFFECTIVE DATE: 04/19/2025 12:00 AM EDT	
CARRIER National Specialty Insurance Company	NAIC CODE 22608		

**ADDITIONAL REMARKS**

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
 FORM NUMBER: Acord 25 FORM TITLE: Certificate of Liability Insurance

Description of Operations (con't)

Episodic Coverage (THSN CG 02 03 02 21) for policy number IBL-P35GX8ZT3J until 05/18/2026 11:59 PM EDT

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

## **DESIGNATED ADDITIONAL INSURED**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE FORM

PROFESSIONAL LIABILITY COVERAGE FORM

### **SCHEDULE**

**Name of Designated Person or Organization (including its departments and attached agencies, its directors, officers, officials, employees, representatives and agents):**

Any person(s) or organization(s) for whom you have agreed in writing in a contract or agreement that such person(s) or organization(s) be added as an additional insured on your policy.

**E-Mail Address:**

**A. SECTION II – WHO IS AN INSURED** is amended to include as an additional insured the person(s) or organization(s) shown in the **SCHEDULE** above, but only with respect to liability for "bodily injury", "property damage", "personal and advertising injury" or "wrongful acts" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

1. In the performance of your ongoing operations; or
2. In connection with your premises owned by or rented to you.

However:

1. The insurance afforded to such additional insured only applies to the extent permitted by law; and
2. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

**B. With respect to the insurance afforded to these additional insureds, the following is added to **LIMITS OF INSURANCE** section of the coverage form**

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

1. Required by the contract or agreement; or
2. Available under the applicable limits of insurance shown in the Declarations;

whichever is less.

**C. If this policy is cancelled or nonrenewed for any reason, we will deliver notice of the cancellation or non-renewal to any Designated Person or Organization shown in the **SCHEDULE** above at the e-mail address shown above.**

**D. This endorsement shall not increase the applicable limits of insurance shown in the Declaration**

All other terms and conditions remain unchanged.

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

**WAIVER OF TRANSFER OF RIGHTS OF RECOVERY  
AGAINST OTHERS TO US (WAIVER OF SUBROGATION)**

This endorsement modifies insurance provided under the following:

- COMMERCIAL GENERAL LIABILITY COVERAGE PART
- ELECTRONIC DATA LIABILITY COVERAGE PART
- LIQUOR LIABILITY COVERAGE PART
- POLLUTION LIABILITY COVERAGE PART DESIGNATED SITES
- POLLUTION LIABILITY LIMITED COVERAGE PART DESIGNATED SITES
- PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART
- RAILROAD PROTECTIVE LIABILITY COVERAGE PART
- UNDERGROUND STORAGE TANK POLICY DESIGNATED TANKS

**SCHEDULE**

**Name Of Person(s) Or Organization(s):**

Any person(s) or organization(s) for whom you have agreed in writing in a contract or agreement that such person(s) or organization(s) be added as an additional insured on your policy.

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

The following is added to Paragraph 8. **Transfer Of Rights Of Recovery Against Others To Us** of Section IV – Conditions:

We waive any right of recovery against the person(s) or organization(s) shown in the Schedule above because of payments we make under this Coverage Part. Such waiver by us applies only to the extent that the insured has waived its right of recovery against such person(s) or organization(s) prior to loss. This endorsement applies only to the person(s) or organization(s) shown in the Schedule above.

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

## **DESIGNATED ADDITIONAL INSURED**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE FORM

PROFESSIONAL LIABILITY COVERAGE FORM

### **SCHEDULE**

**Name of Designated Person or Organization (including its departments and attached agencies, its directors, officers, officials, employees, representatives and agents):**

The City of Isle of Palms

**E-Mail Address:**

desireef@iop.net

**A. SECTION II – WHO IS AN INSURED** is amended to include as an additional insured the person(s) or organization(s) shown in the **SCHEDULE** above, but only with respect to liability for "bodily injury", "property damage", "personal and advertising injury" or "wrongful acts" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

1. In the performance of your ongoing operations; or
2. In connection with your premises owned by or rented to you.

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

However:

1. The insurance afforded to such additional insured only applies to the extent permitted by law; and
  2. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.
- B.** With respect to the insurance afforded to these additional insureds, the following is added to **LIMITS OF INSURANCE** section of the coverage form
- If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:
1. Required by the contract or agreement; or
  2. Available under the applicable limits of insurance shown in the Declarations;
- whichever is less.
- C.** If this policy is cancelled or nonrenewed for any reason, we will deliver notice of the cancellation or non-renewal to any Designated Person or Organization shown in the **SCHEDULE** above at the e-mail address shown above.
- D.** This endorsement shall not increase the applicable limits of insurance shown in the Declaration
- All other terms and conditions remain unchanged.



**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

**PRIMARY AND NONCONTRIBUTORY –  
OTHER INSURANCE CONDITION**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART  
LIQUOR LIABILITY COVERAGE PART  
PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART

The following is added to the **Other Insurance** Condition and supersedes any provision to the contrary:

**Primary And Noncontributory Insurance**

This insurance is primary to and will not seek contribution from any other insurance available to an additional insured under your policy provided that:

- (1) The additional insured is a Named Insured under such other insurance; and

- (2) You have agreed in writing in a contract or agreement that this insurance would be primary and would not seek contribution from any other insurance available to the additional insured.

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

**WAIVER OF TRANSFER OF RIGHTS OF RECOVERY  
AGAINST OTHERS TO US (WAIVER OF SUBROGATION)**

This endorsement modifies insurance provided under the following:

- COMMERCIAL GENERAL LIABILITY COVERAGE PART
- ELECTRONIC DATA LIABILITY COVERAGE PART
- LIQUOR LIABILITY COVERAGE PART
- POLLUTION LIABILITY COVERAGE PART DESIGNATED SITES
- POLLUTION LIABILITY LIMITED COVERAGE PART DESIGNATED SITES
- PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART
- RAILROAD PROTECTIVE LIABILITY COVERAGE PART
- UNDERGROUND STORAGE TANK POLICY DESIGNATED TANKS

**SCHEDULE**

<p><b>Name Of Person(s) Or Organization(s):</b>  The City of Isle of Palms  desireef@iop.net</p>
<p>Information required to complete this Schedule, if not shown above, will be shown in the Declarations.</p>

The following is added to Paragraph 8. **Transfer Of Rights Of Recovery Against Others To Us of Section IV – Conditions:**

We waive any right of recovery against the person(s) or organization(s) shown in the Schedule above because of payments we make under this Coverage Part. Such waiver by us applies only to the extent that the insured has waived its right of recovery against such person(s) or organization(s) prior to loss. This endorsement applies only to the person(s) or organization(s) shown in the Schedule above.



# StarGuard Lifeguard

## Competency Assessment & Performance Record

**Certification Number:** 175918

**Expiration Date:** 05/25/2025

<b>Last name:</b> Depass	<b>First name:</b> Brycen	<b>Middle initial:</b> M
<b>Date of Birth:</b> 02/17/2004	<b>Email Address:</b> brycendepass@gmail.com	<b>Training Center Affiliation:</b> Town of Mount Pleasant

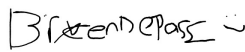
<b>Training Center of Record:</b> Town of Mount Pleasant	<b>Training Location:</b> R L Jones Center
<b>Date of Training:</b> 05/25/2024	<b>Training Format:</b> Blended
<b>Maximum Water Depth:</b> 8 feet or less   <b>Additional Options:</b> Depth: 8' Open Water: [ ] Dispatch: [ ] Oxygen Admin: [X]	

**STUDENT AGREEMENT:**

**Statement of Understanding:** I understand the training requirements for the StarGuard® course and/or any supplemental training module and have completed all course objectives. I understand that it is my responsibility to:

1. Obtain site-specific training at the facility where I work that includes orientation to emergency and operational procedures and practice with equipment
2. Maintain my vigilance, physical fitness (including vision performance), rescue, CPR and first aid skill levels;
3. Exhibit professional behavior (StarGuard® Best Practices) and maintain personal safety when in or around an aquatic environment

I understand that I may be photographed at any time when performing lifeguard duties; that competency assessment of my performance may be conducted at any time; that my image may be used in training or promotional materials produced by StarGuard ELITE. I understand that my competency must be assessed annually by an authorized StarGuard Lifeguard Instructor to renew and retain my StarGuard Lifeguard certification.


<b>Student Name:</b>  Brycen Depass	<b>Student Signature:</b>  
---	---

**INSTRUCTOR AGREEMENT:**

This individual has met the course requirements and demonstrated reasonable competency via written test and skill performance assessment and qualifies for completion certificates in:

- SGE StarGuard® Lifeguard
- Health & Safety Institute Basic Life Support (Professional Rescuer CPR with AED for Adults, Children, and Infants), Basic First Aid, Bloodborne Pathogens, and (if taught) Emergency Oxygen

This student's completion record will be maintained according to the Training Center Administrative Manual (TCAM) standards and guidelines. The student demonstrated competency in **8 feet or less** of water. Verification of performance in deeper water is the responsibility of the employer, based on site-specific needs.

<b>Lead Instructor Name:</b>  Jessica Walsh	<b>Lead Instructor Signature:</b>  
---	---

**Note to the Employer:** This certification record documents the competency and skills performed by the student at the completion of the StarGuard® course. The Competency Assessment & Performance Record is provided for use by the employer. Official course records are maintained by the independent Training Center that conducted the course. Completion of a StarGuard® course does not guarantee future performance nor imply complete training for every circumstance. It is your responsibility as an employer to verify competency, provide site-specific training and supervision, and monitor job performance. To retain StarGuard® certification, skills must be assessed every year, using a new Competency Assessment & Performance Record for renewal.

**Required notice for lifeguards in New York: Meets NY State Department of Health Regulations**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/12/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> JMG Insurance Corp P.O. Box 700 Norwalk CT 06852	<b>CONTACT NAME:</b> Susan Cagen <b>PHONE (A/C. No. Ext):</b> 203-838-5554 <b>E-MAIL ADDRESS:</b> scagen@jmg.com		<b>FAX (A/C. No):</b> 203-857-7848																				
	<table border="1"> <thead> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A :</td> <td>Vantapro Specialty Insurance Company</td> <td>44768</td> </tr> <tr> <td>INSURER B :</td> <td>United States Fire Insurance Company</td> <td>21113</td> </tr> <tr> <td>INSURER C :</td> <td></td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> <td></td> </tr> </tbody> </table>			INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A :	Vantapro Specialty Insurance Company	44768	INSURER B :	United States Fire Insurance Company	21113	INSURER C :			INSURER D :			INSURER E :			INSURER F :	
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INSURER F :																							
<b>INSURED</b> Isla Surf School Inc 1144 Landsdowne Drive Charleston SC 29412	ISLASUR-06																						

**COVERAGES**

CERTIFICATE NUMBER: 206791184

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		5077-1367-01	8/18/2023	8/18/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 1,000,000 \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
B	Accident Medical	Y		US1516594-02	8/18/2023	8/18/2024	Max Medical 25,000 Acc Death/Dismember 5,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

The Certificate Holder is named as Additional Insured only with respect to the acts of the Named Insured and only with respect to the Operations of the Insured during the coverage period.

**CERTIFICATE HOLDER****CANCELLATION**

City of Isle of Palms  
 1207 Palm Blvd  
 Isle of Palms, SC 29451

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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To whom it may concern,

Currently, my lifeguard certification is out of date. Our entire staff is being recertified on March 2nd for the start of our season. I spoke with someone on the phone at the Isle of Palms office who recommend I provide an explanation and then provide our updated certificates once we receive them. I did not want to miss the deadline for the business license renewal so I figured this was the best option.

Please feel free to contact me with any questions or concerns at [shane@islasurfschool-charleston.com](mailto:shane@islasurfschool-charleston.com) or (843) 813-7897.