



Accommodations Tax Advisory Committee

10:00 a.m., Wednesday, May 14, 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 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. **Approval of previous meetings' minutes – April 9 and 23, 2025**
3. **Financial Statements** – Finance Director Debra Hamilton
4. **Old Business**

Consideration of applications for FY26 State Accommodations Tax Funds

- i. YWCA Martin Luther King, Jr. Event, LaVanda Brown - \$10,000
- ii. IOP Chamber of Commerce, Zachary Lary - \$50,000
- iii. Mary Alice Monroe Authors' Events - \$35,000

5. **New Business -- none**
6. **Miscellaneous**

Next meeting: TBD

7. **Adjournment**



ACCOMMODATIONS TAX ADVISORY COMMITTEE

10:00am, Wednesday, April 9, 2025

1207 Palm Boulevard, Isle of Palms, SC

MINUTES

1. Call to order

Present: Rebecca Kovalich, Park Williams, Barb Bergwerf, Rod Turnage, Mike Boykin (via Zoom)

Absent: Chrissy Lorenz, Margaret Miller

Staff Present: Administrator Kerr, Director Hamilton

2. Approval of previous meeting's minutes – March 12, 2025

Ms. Bergwerf made a motion to approve the minutes of the March 12, 2025 meeting, and Mr. Turnage seconded the motion. The motion passed unanimously.

4. Presentation of ATAX application

Mary Alice Monroe Author's Event

Ms. Monroe shared that 50% of attendees who answered their survey stayed on the Isle of Palms during 2025's event. People from all over the country attended the event. The Committee thanked Ms. Monroe for her very thorough application.

5. Financial Statements

Director Hamilton said the City has received \$2.1 million in ATAX funds as of March 31, 2025. ATAX revenues are pacing higher than last year. Expenses for the first 9 months of FY25 are just over \$1 million of a budget of \$4 million.

6. Old Business -- none

7. New Business

A. Consideration of FY26 Budget for State Accommodations Tax Funds

Director Hamilton shared changes made to the FY26 ATAX budget which include an increase in the sponsorship funds from \$50,000 to \$75,000 and the deferral of funds for the Waterway Boulevard project to FY26.

Discussion ensued about beautification projects around the island. Administrator Kerr said that sidewalk improvements are funded by CTC funds and recent beach access path improvements were funded by Greenbelt funds and State budget allocations. Administrator Kerr said the

Committee could identify specific needs, investigate costs, and present such projects for the FY27 budget. Ms. Bergwerf suggested allocating more funds to the City's landscape contractor to do additional work. Administrator Kerr suggested engaging a landscape designer to create designs. Ms. Kovalich suggested speaking with Robert Chestnut who lives on Palm Boulevard and is known for his beautification efforts.

B. Consideration of the FY26 budget from the Charleston Visitor's Bureau

Catherine Dority, Lori Smith, Chris Campbell, and Ami Calhoun of the Charleston Visitor's Bureau shared the myriad plans they have to promote the Isle of Palms in FY26. They will incorporate a year-round approach with a focus on the off-season, promoting the Isle of Palms as a family-friendly place to visit.

They detailed how they have and will continue to highlight the Isle of Palms in their holiday campaigns, digital streaming campaigns, and through VRBO. They will be able to share a more detailed look at the success of FY25's campaigns later this year. They will continue to work on the walkability study, the IOP Thrives initiative (the Community Enrichment Task Force recommendations), and with an outside agency on building an IOP brand.

Ms. Calhoun discussed details about the group sales business and the IOP-specific efforts they have made to attract groups to the island. Mr. Campbell spoke about the CVB's continued collaboration with the City on the shared staff person as well as examples of earned media.

Their FY26 budget covers 5 TERC-approved categories: advertising and marketing, marketing support, group sales, media efforts, and visitor services. Ms. Smith explained that the CVB is still early in its budget process. There was a brief conversation about the CVB's efforts to promote the island for the off-season.

Ms. Kovalich asked what could be done to make the island more of a draw in the off season. Ms. Smith said "If you create it, we will sell it."

Mr. Campbell said the effects of recent changes to Federal policy have not made an impact on travel as of yet. They are tracking it weekly. Occupancy rates are on par with this same time last year.

C. FY25 Budget overages

MOTION: Ms. Bergwerf made a motion to approve the budget overage of \$1 for the debt service on the Fire Department ladder truck and the \$682 overage for the Police Department drone. Mr. Turnage seconded the motion. The motion passed unanimously.

8. Miscellaneous Business

The next meeting of the ATAX Committee will be Wednesday, May 14, 2025 at 10am. The Committee will need to vote on the City proposed FY26 ATAX budget and the CVB's proposed FY26 ATAX budget.

9. **Adjournment**

Ms. Bergwerf made a motion to adjourn, and Mr. Turnage seconded the motion. The meeting was adjourned at 11:21am.

Respectfully submitted,

Nicole DeNeane
City Clerk



ACCOMMODATIONS TAX ADVISORY COMMITTEE

10:00am, Wednesday, April 23, 2025

1207 Palm Boulevard, Isle of Palms, SC

MINUTES

1. Call to order

Present: Rebecca Kovalich, Park Williams, Barb Bergwerf, Rod Turnage, Chrissy Lorenz, Margaret Miller

Absent: Mike Boykin

Staff Present: Administrator Kerr, Director Hamilton

2. Consideration of FY26 Budget for State Accommodations Tax Funds

Mr. Williams said it will be important to keep track of the ATAX revenues throughout the budget year should they be affected by national and international policies and economics.

MOTION: Mr. Williams made a motion to recommend to City Council the approval of the FY26 Budget for State Accommodations Tax Funds. Ms. Bergwerf seconded the motion. The motion passed unanimously.

3. Consideration of the FY26 budget from the Charleston Visitor's Bureau

Catherine Dority, Lori Smith, and Chris Campbell were present to answer questions about the proposed FY26 budget for the Charleston Visitor's Bureau.

Ms. Kovalich asked where travel expenses are located in the budget. Ms. Smith said travel-related expenses are accounted for in trade show line items. She said the effectiveness of trade show attendance is evaluated internally and they "bring back only the best to you for our plans" in FY26.

Ms. Bergwerf asked what percentage of the CVB's budget is related to the Isle of Palms. Ms. Smith said that IOP is 4% of the overall budget and provides 9% of the ATAX revenues.

Ms. Kovalich asked where salaries are accounted for in the budget, and Ms. Smith said that salaries are not addressed by TERC and are not part of the budget as presented. Discussion ensued about the shared employee between the City and the CVB, her job duties, and the critical work she does getting information out to the public about the City.

Mr. Turnage asked why there is such a significant decrease in funds budgeted for Visitor Services. Ms. Smith explained that this number represents a new method in which the CVB

allocate funds for each municipality in an attempt to make the amounts fair. She assured the Committee that the Isle of Palms is still being promoted through Visitor Services.

Mr. Campbell said they have not seen significant changes with their service via Air Canada. The CVB is constantly looking at how public policy affects the travel market. He said the numbers for the first quarter appear to have been affected by January's storm, one less day in February, and Easter in April instead of March. April has had a "strong start."

Ms. Lorenz asked if all Committee members could receive the CVB Weekly email. Ms. Smith will add them to the mailing list.

MOTION: Ms. Bergwerf made a motion to recommend that City Council approve the FY26 CVB Budget as presented. Ms. Lorenz seconded the motion. The motion passed unanimously.

8. Miscellaneous Business

The next meeting of the ATAX Committee will be Wednesday, May 14, 2025 at 10am. The Committee will discuss and vote on the three applications for grants at that time.

9. Adjournment

Ms. Bergwerf made a motion to adjourn, and Ms. Kovalich seconded the motion. The meeting was adjourned at 10:36am.

Respectfully submitted,

Nicole DeNeane
City Clerk

City of Isle of Palms
State Accommodations Tax
Balance Sheet
as of April 30, 2025

	4/30/2024	4/30/2025
CASH @ TRUIST	\$ 184,351	\$ 179,985
CASH @ SC LOCAL GOVERNMENT INVESTMENT POOL	5,205,318	5,907,307
ACCOUNTS RECEIVABLE	-	-
AMOUNTS DUE FROM OTHER FUNDS	-	-
	<hr/>	<hr/>
TOTAL ASSETS	5,389,669	6,087,292
	<hr/>	<hr/>
ACCOUNTS PAYABLE	1,270	46
AMOUNTS DUE TO OTHER FUNDS	188,405	84,172
	<hr/>	<hr/>
TOTAL LIABILITIES	189,675	84,219
	<hr/>	<hr/>
FUND BALANCE Beginning	4,154,059	4,893,009
Excess Revenues Over/(Under) Expenditures	1,045,935	1,110,064
FUND BALANCE	5,199,994	6,003,074
	<hr/>	<hr/>
TOTAL LIABILITIES & FUND BALANCE	\$ 5,389,669	\$ 6,087,292
	<hr/>	<hr/>

City of Isle of Palms
State Accommodations Tax
Revenue Statement for the 10 Months Ending April 30, 2025
Fiscal Year Ending June 30, 2025

Date	Description	Total
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Revenues

Body Armor Assistance Grant	4,184
September Quarterly Payment from State	1,416,366
December Quarterly Payment from State	579,718
March Quarterly Payment from State	
June Quarterly Payment from State	
YTD Interest Income	206,930

Grand Total

2,207,198

State Accommodations Tax
Detailed Expense Statement for the 10 Months Ending April 30, 2025
Fiscal Year Ending June 30, 2025

		<i>A</i>	<i>B</i>	<i>C</i>	<i>B+C-A</i>
Vendor	Description	Actual Expenditure	FY2025 Budget	Committee Approved	(Over)/ Under
Public Restroom Operations					
Dominion	YTD electricity for restrooms	515	750		
IOP WSC	YTD water & irrigation	9,392	12,500		
Blitch, Steady Hands Painting, AAA Fence Co. etc.	YTD maintenance	8,767	45,000		
Port City Paper	YTD paper & cleaning supplies	6,330	11,000		
SCMIRF/Wright Flood	YTD property & flood insurance	10,397	13,200		
Irrigation By Design	YTD Backflow Testing	-	80		
Quality Touch Cleaning	YTD cleaning	20,805	40,000		
IOP Payroll	YTD attendant	19,494	28,367		
		75,702	150,897		75,195
Beach Barrel & Front Beach Business District Trash Pickup					
JLG Enterprise LLC	YTD trash pickup per contract				
		56,805	85,000		28,195
Irrigation at Breach Inlet Sign					
IOP WSC	YTD irrigation				
		253	600		347
Non- Capital					
Maintain Benches at Parks		-	1,000		
Beach Wheelchairs and Maintenance		3,185	5,000		
		3,185	6,000		2,815
Beach Trash Barrels					
Beach Trash Cans		-	7,500		
		-	7,500		7,500

State Accommodations Tax
Detailed Expense Statement for the 10 Months Ending April 30, 2025
Fiscal Year Ending June 30, 2025

		<i>A</i>	<i>B</i>	<i>C</i>	<i>B+C-A</i>
Vendor	Description	Actual Expenditure	FY2025 Budget	Committee Approved	(Over)/ Under
IOP Promotions & Events					
	Connector Run	7,500	7,500		
	Easter Egg Hunt	3,826	4,500		
	Music Events	3,500	4,500		
		14,826	16,500		1,674
Programs & Sponsorship					
	Provisional Events Approved By Committee	50,000	50,000		
	IOP Chamber of Commerce	15,000			
	Island School Literacy Event	35,000			
	July 4th Fireworks	19,637	45,000		
		69,637	95,000		25,363
Charleston CVB - 30% Tourism Promotion Funds					
	Charleston Area CVB	30% distribution for Sept Qtr	447,273		
	Charleston Area CVB	30% distribution for Dec Qtr	183,069		
	Charleston Area CVB	30% distribution for Mar Qtr			
	Charleston Area CVB	30% distribution for Jun Qtr			
	State Mandated 30% Transfer		964,259		
	CVB Quarterly Shared Payroll				
		630,342	964,259		333,917
Tourism Promotion Funds					
	City Hall's Visitor T-Shirt/Promotions	14,463	15,000		
	Charleston Area CVB	Shared Cost	(23,451)		
		(8,988)	15,000		23,988
Transfer to IOP Marina for 75% of Bond Debt Service					
	Isle of Palms Marina Enterprise Fund	*	250,391	-	250,391

State Accommodations Tax
Detailed Expense Statement for the 10 Months Ending April 30, 2025
Fiscal Year Ending June 30, 2025

		<i>A</i>	<i>B</i>	<i>C</i>	<i>B+C-A</i>
Vendor	Description	Actual Expenditure	FY2025 Budget	Committee Approved	(Over)/ Under
Police					
	Body Armor	3,384	7,500		
	Training Room Upgrades	16,649	17,500		
		20,033	25,000		4,967
Capital Outlay					
General Government					
	IOP Message Board	2,156	25,000		
	1/3 Planning of City Hall Repair/Renovation		83,333		
		2,156	108,333		106,177
Police					
	UTV	20,350	22,000		1,650
	1/2 Public Safety Drone	12,182	11,500	682	-
	Tasers	16,997	18,171		1,174
	Access Control System	31,250	31,250		
		80,778	82,921	682	2,825
Fire					
	1/3 Share Rescue Boat		100,000		
	Training Mannequins	13,347	22,000		
	Access Control System	31,250	31,250		
		44,597	153,250		108,653
Public Works					
	Waterway Blvd Multi-Use Path		570,000		
		-	570,000		570,000

State Accommodations Tax
Detailed Expense Statement for the 10 Months Ending April 30, 2025
Fiscal Year Ending June 30, 2025

Vendor	Description	A Actual Expenditure	B FY2025 Budget	C Committee Approved	B+C-A (Over)/ Under
Recreation					
	19% Playground W/ Pour & Play Surface		124,335		
		-	124,335		124,335
Front Beach & Restrooms					
	To Repair 4500 Linear Ft of Sidewalk		70,000		
	Resurface City Owned Parts of Ocean Blvd		100,000		
		-	170,000		170,000
Fire Dept Debt Service on 75' Ladder Truck					
Truist Govt Finance	75' Ladder Truck - Principal	83,947	83,947	0.12	-
	75' Ladder Truck - Interest	7,967	7,967	0.49	-
		91,915	91,914	1	-
Unexpended Projects/Miscellaneous					
	GF-Public Relations & Tourism Coordinator		39,744		
	GF-Firefighters (3)		273,875		
	GF-Paramedics (3)		313,364		
	GF-Police Officer (2)		199,145		
	GF-ALL Beach Service Officers & Marina Parking Attendant		35,692		
	GF-Police Overtime		20,000		
	GF-SRT Coordinator		74,769		
	GF-Code Enforcement Officer		78,947		
	MF-Beach Run Sponsorship		3,000		
	MF-T Dock		83,000		
	MF- Marina Green Space		50,000		
	Miscellaneous		1,000		
		-	1,172,536		1,172,536
Grand Total		1,081,241	4,089,436	683	2,600,060

[illegible]

City of Isle of Palms
SC State Accommodations Tax

Total State Atax Received from SC Treasurer

	Qtr 1 July-Sept	Qtr 2 Oct-Dec	Qtr 3 Jan-Mar	Qtr 4 Apr-June	Fiscal Year Total	Increase/ Decrease
FY11	532,879	189,711	55,395	394,752	1,172,737	
FY12	653,545	289,771	62,947	456,073	1,462,336	25%
FY13	675,341	283,750	82,388	443,861	1,485,340	2%
FY14	774,983	262,670	87,506	558,702	1,683,861	13%
FY15	783,479	283,054	92,269	575,444	1,734,246	3%
FY16	804,398	282,321	108,240	567,694	1,762,653	2%
FY17	807,457	281,373	100,997	633,111	1,822,939	3%
FY18	803,215	318,255	116,670	641,995	1,880,136	3%
FY19	846,664	318,661	164,861	692,063	2,022,250	8%
FY20	899,029	285,557	142,616	379,931	1,707,133	-16%
FY21	858,508	393,960	209,721	1,007,541	2,469,730	45%
FY22	1,331,176	540,555	265,979	1,369,717	3,507,427	42%
FY23	1,471,275	560,834	286,190	1,420,714	3,739,013	7%
FY24	1,410,977	550,458	291,998	1,276,103	3,529,536	-6%
FY25	1,497,161	616,480			2,113,641	8%

Total State Atax Transferred to Charleston CVB (30%)

	Qtr 1 July-Sept	Qtr 2 Oct-Dec	Qtr 3 Jan-Mar	Qtr 4 Apr-June	Fiscal Year Total	Increase/ Decrease
FY11	157,989	55,038	14,743	116,551	344,321	
FY12	194,188	85,056	17,009	134,947	431,201	25%
FY13	200,727	83,250	22,841	131,283	438,102	2%
FY14	230,620	76,926	24,377	165,736	497,658	14%
FY15	233,169	83,041	25,806	170,758	512,774	3%
FY16	239,444	82,821	30,597	168,433	521,296	2%
FY17	240,362	82,537	28,424	188,058	539,382	3%
FY18	239,090	93,602	33,126	190,723	556,541	3%
FY19	252,124	93,723	47,583	205,744	599,175	8%
FY20	267,834	83,792	40,910	112,104	504,640	-16%
FY21	255,677	116,313	61,041	300,387	733,419	45%
FY22	397,475	160,292	77,919	409,040	1,044,726	42%
FY23	439,505	166,375	83,982	415,472	1,105,334	6%
FY24	421,418	163,262	85,724	380,956	1,051,360	-5%
FY25	447,273	183,069			630,342	8%

State Accommodations Tax Advisory Committee
Isle of Palms, South Carolina

Application for City of Isle of Palms ATAX Grant
For Office Use Only

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

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

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

B. ☒ Applicant Organization: YWCA Greater Charleston (YWCA.GC)

1. ☐ Mailing Address: PO Box 80935 Charleston SC 29416

Telephone: 843-722-16440 Email: Lbrown@ywca-charlestonsc.org

2. ☐ Project Director: Lavanda Brown Executive Director

Telephone: 843-766-1644 Email: LBrown@ywca-charlestonsc.org

3. ☐ Description of Organization, Its Goals and Objectives:

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

C. Description and Location of Project:

This application is to sponsor the networking reception which will serve as an integral event in the 6-day tricounty tribute to Rev. Dr. Martin Luther King. The reception will be held at the Sweetgrass Inn on Friday January 17, 2025 (the slowest time of the tourist year). It is likely that many of the 150 guests will remain overnight on the island and will find it convenient to remain in place either for the night or for the entire week of festivities. The resort is generously

donating the event space and offering a discount on rooms for guests.

IOP is in a unique position to create a new revenue source that could expand the client base significantly. With the opening of the International African American Museum (IAAM) downtown (a partner of YWCAGC), it is likely that MLK weekend could become a major destination during a time when there is excess accommodation availability. By hosting the new and unique event of the week, the island is positioning itself to be a major destination for participants, and to encourage new visitors to return for vacations at other times of the year. This will be the third year and we are building on the momentum created in the last two years and partner to grow this into something unique and mutually beneficial.

☒ Single Event?

☐ Ongoing Event/Annual Need?

1. ☐ Date(s): of project/ event or start date: 1/16/2026 Completion date: 1/16/2026

2. ☐ Impact on Tourism: What percentage of persons benefitting from this project are tourists, ie. those coming from more than 50 miles away and expected to spend the night on Isle of Palms (40%) compared to Isle of Palms residents (15%) vs. visitors from within 50 miles such as "day trippers" (50%)

Because the reception is for elite visitors, we anticipate many will prefer the convenience of remaining on the island either overnight or for the entire weekend. Guests will include corporate donors, elected officials and other dignitaries. Since the first event we have learned how to better market this event and identify the target audience. Sign in sheets is the source of data.

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

3. ☐ If this application is for an ongoing event, what is the percentage increase/decrease in tourist attendance compared to each of the past three years' events? Attendance increased by 66% from year 1 to year 2

*Source of tourist data? Sign in sheets and registration forms.
(website tracking, surveys, lodging data, sales information, etc.)

4. ☐ Is your event to be conducted entirely on Isle of Palms? **YES** If not, please set forth the percentage occurring on Isle of Palms, as well as the specific locations and the percentages occurring elsewhere.

5. ☐ To your knowledge, does anyone else promote projects similar to yours within the city limits of Isle of Palms? If so, how is your project similar and/or unique? Given the parameters, please explain why your project is entitled to City of Isle of Palms ATAX funding.

There is no similar event on IOP to our knowledge and Explore Charleston along with the Sweetgrass Inn have agreed to help support this event once again for recognizing this is a unique opportunity to bring a diverse clientele to the island and expand heads in beds during the slowest time of the year.

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

With the help of Jan Anderson, we have met with incredible success in planning and scheduling the VIP Reception. When the Wild Dunes Resort was approached, they immediately committed to donating the event space free of charge and to discount rooms for guests. When the Charleston Visitors Bureau (CVB) was approached, they immediately agreed to donate food and beverage costs (bringing IOP ATAX contributions back to the island). A Gullah/Geechie island resident has been providing centerpieces, and we have recruited a band to provide entertainment. The first year was a great pilot and year two showed great growth and interest. Feedback suggests it is a welcome addition the MLK lineup and changing the date to a Friday most likely led to more overnight stays.

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

The YWCA's MLK multi day events is now in its 52nd year of paying tribute to Dr. King, making it one of the longest running tributes in the country and it is the largest in the state. The tribute brings diverse individuals from across the state and country. The reception is a unique opportunity to bring a diverse clientele to the island and expand heads in beds during the slowest time of the year. As the initial sponsor of the VIP event, the island is positioned to become a destination for future MLK week visitors, introducing a new demographic to the island and to other island vacation offerings. There is no better way to spend ATAX dollars than to support an event during the slowest time of the year and to a new demographic.

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

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

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

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

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

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

Last year was the first year and we have no history of lodging on the island. However, year two (2025) there were 2 rooms (4 guests) who stayed on the island overnight and several others who ate and drank on the resort before and after the reception. We continue to revamp our marketing plan, initiate our planning much earlier, and invite more speakers and program participants from out of the tricity strategically to encourage overnight stays for 2026.

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

well as your means of calculation. _____

Our history with events has shown that it takes 3-5 years to actualize goals while taking advantage of momentum and learning opportunities. We anticipate that 30% of the 2026 guests will stay overnight with more targeted marketing.

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

The MLK tribute is the longest running and has grown into the largest tribute of its kind in South Carolina. It draws participants from across the state and beyond. In 2024 the VIP reception was the first event of its kind for the MLK tribute, but it is likely this event will evolve into a week-long destination with the support of the CVB and the IAAM museum. IOP will be well positioned to capitalize on this event as a showpiece for the island.

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

This event is by invitation only and will include as many as 150 invited guests of which we estimate half may opt to stay on the island overnight.

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

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

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

Because the reception is during January there will be no negative impacts, only positive economic impacts during a slow time.

E. Marketing Plan

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

YWCAGC utilizes its network of hundreds of members and volunteers

along with nearly 4,000 social media followers and e-blast registrants, to promote new initiatives and funding partners. In the last 3 years the MLK tribute's media exposure has grown from 3-5 media appearances to 10 in 2024 including local networks, print, and radio. In the last year our engagement through Facebook increased by 54%, Instagram by 231%, and our website traffic increased by 25%. We have recently hired a full-time director of communications to assist with marketing outside of the tricounty and plan to work with Explore Charleston to possibly advertise to their constituents as well.

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

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

2. ☐ Entry Fees : Amount \$ 0 _____ From _____

3. ☐ Donations: Amount \$ 0 _____ From _____

4. ☐ Accommodations Tax Funds Request: Amount **\$10,000**

Date(s) Required: **11/1/2025** Lump Sum **YES** Installments _____

5. ☐ Other:

6. ☐ Total Funding: **\$43,500** Total Budget: **\$53,500**

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

Room rental/Food and Bev \$43,500

Marketing/Communications - \$3,000

Photography/AV - \$2,500

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

Branded collateral - \$1,500

Invitations/mailing - \$1,000

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

Marketing/Communications - \$3,000

Photography/AV - \$2,500

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

Branded collateral - \$1,500

Invitations/mailing - \$1,000

(1) Lump Sum(s): \$10,000 on 11/1/2025 (date),
\$ on (date),
\$ on (date).

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

H. Miscellaneous

1. In what category do you place your project/event and why?

- Festival
- Marketing
- Other _ (Please Explain):

2. Have you affirmatively reached out to the City of Isle of Palms staff for initial review for your project/event and if not, please explain. If you have reached out, what feedback did you receive, both positive and negative and specifically from whom? Since the inception of this new event YWCA.GC has worked with Councilwoman Jan Anderson in the planning and coordination. She received positive feedback after the event and stated that it was "a wonderful success". Council Woman Anderson reported that a "another request could certainly be favorably received".

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

We have received donations from Wild Dunes Resort (event space), CVB (food and beverage), a local artist (centerpieces), and a local band (TBD).

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

5. ☐ Do you assert that the project/event for which you seek City of Isle of Palms ATAX funding is sustainable in the future? If so, please explain fully. If not, please explain fully.

With the willing support received this year as an example, we anticipate that the event should be sustainable in the future, but we would always welcome ATAX support.

6. ☐ In the event City of Isle of Palms grants your project/event ATAX grant funding, do you acknowledge that no such funds can be spent for the purchase of alcohol or tobacco products? _____ If not, please explain your justification. **YES** _____

7. ☐ In the event your project/event is awarded City of Isle of Palms ATAX grant funding, but is postponed for more than 180 days of receipt of funding, do you acknowledge that you must return to the City of Isle of Palms all ATAX grant money received from Isle of Palms absent extraordinary circumstances and within the sole discretion of the City of Isle of Palms? Do you agree? **YES** If you do not agree, please set forth fully your reasons. _____

8. ☐ In the event your project/event is granted City of Isle of Palms ATAX grant funding, you must and do hereby agree by the filing your application personally to hold harmless and indemnify the City of Isle of Palms, its employees and agents from and against any claims for damages to include, *inter alia*, legal fees relative to your project/event. Do you agree? **YES** If not, please explain. _____

If not, please explain fully your basis. _____

9. ☐ In the event the City of Isle of Palms provides ATAX grant funding for your event/project, set forth in detail how you will acknowledge the City of Isle of Palms as a grantor of funding.

YWCA GC consistently promotes its events, and sponsors on social media, newsletters, all media outlets and at our events. YWCAGC also announces events and sponsors via press releases to gain local news outlets support and stories. If awarded and if approved YWCAGC director of communications will work with IOP staff to develop and robust announcement of the funding and partnership.

Respectfully submitted by
Lavanda Brown



Revised February 8, 2021

State Accommodations Tax Advisory Committee
Isle of Palms, South Carolina

Application for City of Isle of Palms ATAX Grant

For Office Use Only

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

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

A. Project Name: IOP Chamber of Commerce - Branding effort to support Family Visitors to IOP.

B. Applicant Organization: Isle of Palms Chamber of Commerce

1. Mailing Address: PO Box 625, Isle of Palms, SC 29451

Telephone: 843-810-5179 Email: hello@iopchamber.com

2. Project Director: Zach Lary

Telephone: 843-810-5179 Email zlary@zlinvestments.com

3. Description of Organization, Its Goals and Objectives:

Mission: We advocate to advance commerce by serving residents and guests.

Vision: Our vibrant island lifestyle is always in season.

Objectives: Work closely with local government, the business community, visitors and residents to optimize quality of life, the island's strategic brand, and future.

C. Description and Location of Project:

Perform an initial 12-month branding initiative to attract families to the Isle of Palms.

Leverage the findings, analytics, and best practices to further enhance an ongoing effort, and targeted use of ATAX funds. This includes a digital and print campaign utilizing ads, search engine optimization, Google G4, and geo-targeting.

☐ Single Event?

☒ Ongoing Event/Annual Need?

1. Date(s): of project/ event or start date: April 1, 2025 Completion date: March 31, 2026
2. Impact on Tourism: What percentage of persons benefitting from this project are tourists, ie. those coming from more than 50 miles away and expected to spend the night on Isle of Palms (70 %) compared to Isle of Palms residents (15 %) vs. visitors from within 50 miles such as "day trippers" (15 %)

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

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

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

4. Is your event to be conducted entirely on Isle of Palms? Yes If not, please set forth the percentage occurring on Isle of Palms, as well as the specific locations and the percentages occurring elsewhere.
5. To your knowledge, does anyone else promote projects similar to yours within the city limits of Isle of Palms? If so, how is your project similar and/or unique? Given the parameters, please explain why your project is entitled to City of Isle of Palms ATAX funding.
No
6. Set forth fully the successes and failures you have experienced for your proposed project for which you seek City of Isle of Palms ATAX funding for each of the past three years. Set forth the metrics by which you have

measured success for the past three years, as well as the metrics by which you will measure success for the current year's project/event on the City of Isle of Palms. See 3 year analytics from ATAX grant supporting Chamber start-up.

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

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

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

We will present occupancy data (source KeyData) and geographic visitor data for the prior three years. All are staying on Isle of Palms.
2. Provide all additional economic and other relevant information justifying the grant of ATAX funding by City of Isle of Palms for your project/event, as well as your means of calculation. Post project data and feedback will serve as a baseline for future targeted branding efforts. We will present back a ROI model.
3. Set forth the number of tourists attending your project/event on the Isle of Palms for each of the past three years. Include where applicable all relevant documentation along with the methodology by which you have done your calculations. **numbers below do not include direct reservations with IOP property managers**
9/1/23 - 9/1/24 = 12,635 check-ins x 5 (avg occ) = 63,175 tourists; 9/1/22 - 9/1/23 = 13,273 CI x 5 = 66,365
4. Set forth the number of attendees projected for this year's project/event, and well as the means of calculation. 66,365 plus 15% (rate of direct bookings) = estimated 76,320 tourists
targeting to increase the total number of family vacationers

5. Is the project/event for which you seek City of Isle of Palms ATAX funding during the "off season" or "shoulder season"? If not, please explain the justification. Are proposed dates flexible so as to be amenable to off-season and/or shoulder season scheduling? Fall, Winter and Spring campaign supports overall bookings.
6. Describe fully all potentially negative aspects of your project/event, if any. This would include, by way of illustration, the potential for overcrowding particularly during warm weather months, parking challenges, health and safety issues, added responsibilities and difficulties imposed on first responders, impact on peace and tranquility- especially in residential neighborhoods and for tourists and factors potentially impacting adversely on the character of the City of Isle of Palms. Our overall marketing strategy supports visitor awareness to City laws/ordinances and guidelines for beach, noise, parking, etc. This includes our "good neighbor" policy.

E. Marketing Plan

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

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

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

2. Entry Fees : Amount \$ _____ From _____

3. Donations: Amount \$ _____ From _____

4. Accommodations Tax Funds Request: Amount \$ 55,000

Date(s) Required: 4/1/25 - 3/31/26 Lump Sum Yes Installments _____

5. Other:

6. Total Funding: \$55,000 Total Budget: proposed \$250,000

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

To be included in presentation and follow on documents

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

Revised February 8, 2021

(1) Lump Sum(s): \$ 55,000 on _____ (date),
\$ _____ on _____ (date),
\$ _____ on _____ (date).

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

H. Miscellaneous

1. In what category do you place your project/event and why?
 - Festival _____
 - Marketing X _____
 - Other (Please Explain): _____
2. Have you affirmatively reached out to the City of Isle of Palms staff for initial review for your project/event and if not, please explain. If you have reached out, what feedback did you receive, both positive and negative and specifically from whom?
We have spoken with City staff and Council members and received positive feedback.
3. If applicable, explain why you have not sought funding from sources other than the City of Isle of Palms for the funding of your project/event. If you have sought alternate or additional funding, explain fully the results to include the source(s) for funding, from whom received and set forth all amounts received or expected to be received from other sources.
We are a non-profit and operational costs come from our membership dues. The City is the only supporting entity with collective incentive/interest
4. Does your project/event have applicable liability insurance, to include the City of Isle of Palms, its employees and agents and if so, what are the liability limits? If not, please explain why not and explain who will agree to bear the costs, burdens, damages and legal fees for your project/event in case claims for damages are made against the City of Isle of Palms, its employees and agents as a result of your project/event. A minimum of \$300,000 of liability insurance is typically required unless that requirement is specifically waived in writing by the City of Isle of Palms in its sole discretion. If there is applicable insurance, do you commit to making the City of Isle of Palms, its employees and agents additional insured(s)? If not, explain fully the basis. If applicable, you must include a copy of the relevant insurance policy reflecting the City of Isle of Palms, its employees and agents are additional insured(s) for your project/event. n/a
5. Do you assert that the project/event for which you seek City of Isle of Palms ATAX funding is sustainable in the future? If so, please explain fully. If not, please explain fully. Yes and this is the whole point of the project = future sustainable model supporting ATAX in the future.
6. In the event City of Isle of Palms grants your project/event ATAX grant funding, do you acknowledge that no such funds can be spent for the purchase of alcohol or tobacco products? YES If not, please explain your justification. _____
7. In the event your project/event is awarded City of Isle of Palms ATAX grant

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

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

Recognition will be acknowledged in print media, social media channels and with in-person member meetings
_____ once a month.

State Accommodations Tax Advisory Committee
Isle of Palms, South Carolina

Application for City of Isle of Palms ATAX Grant

For Office Use Only

Date Received: <u>3.31.25</u>	Total Project Cost: _____
Total Accommodations Tax Funds Requested: _____	
Recommendation by City of IOP Staff (yes and if so amount ;no; defer to committee; n/a) : _____	
Action Taken By Accommodations Tax Advisory Committee:	
Date _____ Approved _____ Denied _____ Amended _____ Other _____	

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

A. Project Name: Wild Dunes Author Event with Mary Alice Monroe (Literary Series)

B. Applicant Organization: Island School Literacy Events I.S.L.E. non profit

1. Mailing Address: 7 2nd Av, Isle of Palms, SC 29451

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

2. Project Director: Mary Alice Monroe

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

3. Description of Organization, Its Goals and Objectives:

Our goals are to maintain a nationally prominent literary event on Isle of Palms

that attracts 500 attendees in January for the main event and attract an additional 300 people

to the island in spring, summer and fall seasonal events. The purpose is to connect readers with notable authors on our island thus raising awareness of Isle of Palms nationally. Also to promote local business and support local literacy efforts.

C. Description and Location of Project:

"The Wild Dunes Author Event with Mary Alice Monroe" is a nationally recognized literary event that brings 500 people to the Isle of Palms every January to enjoy conversations and experiences with celebrated authors in a beautiful setting. We bring in top, internationally, #1 New York Times bestselling authors like David Baldacci, Kathy Reichs, William Kent Krueger, Patti Callahan Henry and Mary Kay Andrews. We have expanded off Wild Dunes to island venues like Islander 71 and Long Island Cafe. We also expanded to

include seasonal events. And we plan to expand more. We attribute this growth to the impactful support of ATAX funding.

☐ Single Event?

☒ Ongoing Event/Annual Need?

1. Date(s): of project/ event or start date: July 2025 Completion date: July 2026

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

See attached.

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

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

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

4. Is your event to be conducted entirely on Isle of Palms? Yes If not, please set forth the percentage occurring on Isle of Palms, as well as the specific locations and the percentages occurring elsewhere.

5. To your knowledge, does anyone else promote projects similar to yours within the city limits of Isle of Palms? If so, how is your project similar and/or unique? Given the parameters, please explain why your project is entitled to City of Isle of Palms ATAX funding.

No

6. Set forth fully the successes and failures you have experienced for your proposed project for which you seek City of Isle of Palms ATAX funding for each of the past three years. Set forth the metrics by which you have

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

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

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

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

see attached

2. Provide all additional economic and other relevant information justifying the grant of ATAX funding by City of Isle of Palms for your project/event, as well as your means of calculation.
3. Set forth the number of tourists attending your project/event on the Isle of Palms for each of the past three years. Include where applicable all relevant documentation along with the methodology by which you have done your calculations.
4. Set forth the number of attendees projected for this year's project/event, and well as the means of calculation.

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

E. Marketing Plan

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

With ATAX, we hired marketing to send out newsletters, paid for ads. see attached

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

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

2. Entry Fees : Amount \$ \$1500. From _____

3. Donations: Amount \$ _____ From _____

4. Accommodations Tax Funds Request: Amount \$

Date(s) Required: Lump Sum Installments _____

5. Other:

6. Total Funding: Total Budget: _____

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

see attached

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

(1) Lump Sum(s): \$ \$35,000. on July 1, 2025 (date),
\$ _____ on _____ (date),
\$ _____ on _____ (date).

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

H. Miscellaneous

1. In what category do you place your project/event and why?
 - Festival Literary Festival
 - Marketing _____
 - Other (Please Explain): _____
2. Have you affirmatively reached out to the City of Isle of Palms staff for initial review for your project/event and if not, please explain. If you have reached out, what feedback did you receive, both positive and negative and specifically from whom?

Yes
3. If applicable, explain why you have not sought funding from sources other than the City of Isle of Palms for the funding of your project/event. If you have sought alternate or additional funding, explain fully the results to include the source(s) for funding, from whom received and set forth all amounts received or expected to be received from other sources.
4. Does your project/event have applicable liability insurance, to include the City of Isle of Palms, its employees and agents and if so, what are the liability limits? If not, please explain why not and explain who will agree to bear the costs, burdens, damages and legal fees for your project/event in case claims for damages are made against the City of Isle of Palms, its employees and agents as a result of your project/event. A minimum of \$300,000 of liability insurance is typically required unless that requirement is specifically waived in writing by the City of Isle of Palms in its sole discretion. If there is applicable insurance, do you commit to making the City of Isle of Palms, its employees and agents additional insured(s)? If not, explain fully the basis. If applicable, you must include a copy of the relevant insurance policy reflecting the City of Isle of Palms, its employees and agents are additional insured(s) for your project/event. yes
5. Do you assert that the project/event for which you seek City of Isle of Palms ATAX funding is sustainable in the future? If so, please explain fully. If not, please explain fully. yes
6. In the event City of Isle of Palms grants your project/event ATAX grant funding, do you acknowledge that no such funds can be spent for the purchase of alcohol or tobacco products? yes If not, please explain your justification. _____
7. In the event your project/event is awarded City of Isle of Palms ATAX grant

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

8. In the event your project/event is granted City of Isle of Palms ATAX grant funding, you must and do hereby agree by the filing your application personally to hold harmless and indemnify the City of Isle of Palms, its employees and agents from and against any claims for damages to include, *inter alia*, legal fees relative to your project/event. Do you agree? yes If not, please explain. _____

If not, please explain fully your basis. _____

9. In the event the City of Isle of Palms provides ATAX grant funding for your event/project, set forth in detail how you will acknowledge the City of Isle of Palms as a grantor of funding.

I will acknowledge my city with pride!

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

ATTACHED ANSWERS TO ATAX QUESTIONS

1. Dates of project/event

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

2. Impact on Tourism

The percentages were calculated from our Feedback Survey emailed to all attendees. We received responses back from 149 guests. Those who identified themselves as an IOP resident were lumped into the larger percentage since they did not book a stay on the island. Our survey was printed and distributed to every guest and collected at the end of the event. We also emailed the survey to guests immediately after the event through Mailchimp. See attached reply.

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

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

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

Using the lodging data available to us from Wild Dunes Resort, we were able to determine the number of guests staying on Isle of Palms was an increase from 2023 to 2024. In 2024 we sold out every event with waiting lists for both the summer and winter gala events. For 2025 winter gala, a major author cancelled, and we saw a drop in attendance, though tickets did sell out. Prior to 2023, we did not track on-island reservation data. However, we have monitored the annual event's success through ticket sales, which have trended upward year-after-year.

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

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

Based on ticket sales, our growth has continued upward.

2020 we sold out 425 tickets.

2021 canceled due to Covid.

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

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

2024 we sold out main event at 425 tickets, plus sold an additional 120 tickets for Friday kick-off party highlighting local authors at The Islander 71 Restaurant,(our first there) and additional 211 tickets total for Saturday workshops (3 smaller events).

2025 We sold 301 tickets to the main event. Due to cancellation of author, there was a lower attendance rate. Plus we sold 168 tickets for Saturday and 114 tickets for Friday night (again at Islander 71) for a successful weekend total of 583.

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

7. Describe fully the success and failures you have experienced for your proposed project for which you seek City of Isle of Palms ATAX funding for each of the past three years.

We had our 20th anniversary in 2025. For most of those years we held this literary event on Isle of Palms with only the donated support of Wild Dunes Resort, local businesses, and Monroe's personal expense. The event has grown from 50 people to 500 and is now a nationally recognized literary event. We are proud of the success of the event and that it is held on my home island, Isle of Palms.

As above reveals, a growing number of the 500 plus winter attendees are

staying the night on Isle of Palms. We will encourage tourists to spend the night on Isle of Palms with added ticket attractions. We look forward to suggestions from hotels and rental accommodations on how to include them in our planning. In 2024 we met with island businesses to encourage involvement. We will continue to work to create opportunities that benefit Isle of Palms businesses, restaurants, etc and tourist activities over the weekend, especially during the quiet month of January.

With the ongoing support of ATAX funding, we have expanded to grow this literary weekend to include three more seasonal events. Each event was sold out, two of the three had waiting lists. We anticipate continued sold out crowds for each event. Note: the large event of 500 plus is in January. The spring, summer, fall events are smaller, thus not overcrowding the island in the warm weather months.

This event receives national attention and puts Isle of Palms on the map for literary and cultural events. And this upward trend of attendance and support of the winter literary weekend (thanks in part to an ATAX grant) has allowed me to firmly establish Isle of Palms as a literary destination for readers through the *Wild Dunes Literary Series with Mary Alice Monroe*

D. Financial Justification

2025 We sent out two surveys to the audience: in hand at program and by email. From that we learned that more than 50% of the responders stayed on Isle of Palms for the literary weekend.

Buxton Books shared the list of Zip Codes from the ticket purchases. I was able to get the following information:

- A total of 24 STATES were represented in our audience for the January 2025 event.
- The TOP SIX STATES represented were SC, NC, GA, TN, NY, OH
- The farthest distance traveled were North Dakota and Maine

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

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

2025: We sold 583 tickets, including tickets to smaller workshops/experiences that are part of the Wild Dunes Author Event & Weekend experience. Those additional tickets will include: Friday kick-off event; Saturday events.

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

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

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

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

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

The main event that attracts 500 people is held in January, a time the island looks for heads in beds. In twenty years, we

have never had negative aspects of the project for Isle of Palms. Parking is arranged by Wild Dunes. For the spring, summer, and fall events, the number of guests is significantly smaller, and parking is provided by Wild Dunes Resort.

E. Marketing Plan

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

With the support of ATAX funds we have been able to hire a marketing team. We have updated the MAM website to give the Wild Dunes Author Events a page, calendar of events, and link to ticket sales. In addition, Buxton Books and Wild Dunes promotes the events, as do the nationally recognized authors who attend our events, exponentially adding to the demographics. Articles and ads have appeared in local newspapers and magazines, Authors have appeared on local television. We took an add in Southern Living Magazine. We continue to pursue an article on the event in a national magazine.

I (Mary Alice) invite authors approximately a year in advance. Our marketing plan begins approximately 4 months ahead of the event weekend with outreach to Wild Dunes Club members, then to my newsletter subscribers and social media followers. From there, our bookstore, sponsors, and authors help amplify the news about ticket sales. We do a mix of traditional media outreach in local newspapers, local television, and online local news outlets. I give my time doing interviews for print and television at local news station(s) to promote the event. In years past, I have spent my own money on social media advertising. These efforts have led to a successful, sold-out attendance each year.

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

1. Sponsorships or Fundraising: Amount \$ UNSPECIFIED
From:
Our sponsorships have historically been product donations. These are the sponsors who we will invite to join us again for 2025: Firefly Distillery; Charleston Coffee Roasters; Caroline's Cakes;

Nothing Bundt Cake, Barrier Island Eco Tours; Long Island Café; J. McLaughlin; Wild Dunes Resort; Islander 71; (and more!)

1. Entry Fees : Amount \$ **NONE** (Ticketed Events Only)
2. Donations: Amount \$ **NONE COLLECTED YET**
3. Accommodations Tax Funds Request: Amount **\$ 35,000**

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

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

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

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

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

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

H. Miscellaneous

1. In what category do you place your project/event and why?

Festival

Marketing

- Other **X** (Please Explain):

This is a literary weekend event held annually during the Martin Luther King federal holiday weekend, which encourages our guests to stay an extra night because of the holiday. It is the flagship event that is part of the Wild Dunes Literary Series, which

offers smaller, seasonal one-day events featuring an author and their work. This is made possible thanks to the support of the Isle of Palms ATAX funding. Connecting readers to notable writers in intimate ways on the Isle of Palms.

2. Have you affirmatively reached out to the City of Isle of Palms staff for initial review for your project/event and if not, please explain. If you have reached out, what feedback did you receive, both positive and negative and specifically from whom?

I have been in touch with Desiree Fragoso (I was once on the ATAX committee for Isle of Palms).

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

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

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

Wild Dunes Resort has liability insurance for the event.

5. Do you assert that the project/event for which you seek City of Isle of Palms ATAX funding is sustainable in the future? If so, please explain fully. If not, please explain fully. **YES**
6. In the event City of Isle of Palms grants your project/event ATAX grant funding, do you acknowledge that no such funds can be spent for the purchase of alcohol or tobacco products? **YES**
If not, please explain your justification.
7. In the event your project/event is awarded City of Isle of Palms ATAX grant funding, but is postponed for more than 180 days of receipt of funding, do you acknowledge that you must return to the City of Isle of Palms all ATAX grant money received from Isle of Palms absent extraordinary circumstances and within the sole discretion of the City of Isle of Palms? Do you agree? **YES**
If you do not agree, please set forth fully your reasons.
8. In the event your project/event is granted City of Isle of Palms ATAX grant funding, you must and do hereby agree by the filing your application personally to hold harmless and indemnify the City of Isle of Palms, its employees and agents from and against any claims for damages to include, *inter alia*, legal fees relative to your project/event. Do you agree? **YES**
If not, please explain. _____
If not, please explain fully your basis. _____
9. In the event the City of Isle of Palms provides ATAX grant funding for your event/project, set forth in detail how you will acknowledge the City of Isle of Palms as a grantor of funding.

YES, I will acknowledge my city with pride!

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

ADDENDUM TO ATAX APPLICATION: ISLE Wild Dunes Author Event

JULY 2025-JULY 2026

SUMMER 2025

The summer event celebrates children's literature with authors of popular children's books. We launched the summer event with Mary Alice Monroe's NY Times #2 bestselling middle grade series *The Islanders*. This ticketed event is held at the Palmetto Room and Wild Dunes Swim Center. It is quickly becoming a favorite family event with a book reading and signing, kid snacks, arts and crafts, games, a pirate ship bounce house, a visit from alligator "Big Al" and pool time! Each year, we look forward to bringing families together with favorite authors to encourage family reading. There is no other similar event in the lowcountry!

****** Mary Alice Monroe and Angela May join NYTimes author Marie Benedict with her new middle grade book series

FALL 2025

The fall event returns to adult fiction. Sometimes a cocktail party, sometimes a luncheon. In 2025 we had a wildly successful tartan ball to celebrate the launch of our acclaimed lowcountry Scottish historic fiction author Signe Pike Attendance 120 max.

WINTER: January (Martin Luther King Weekend) 2026

Wild Dunes Author Event & Weekend with Mary Alice Monroe

The winter event held every Martin Luther King weekend on Isle of Palms is the main, flagship event of the literary series. The three-day weekend experience brings several of America's top bestselling authors as well as other notable local writers together with book lovers. There is a varied offering of workshops, a luncheon, cocktail parties with authors and a ballroom gala. All feature up close and personal conversations about the works and lives of the featured authors. Attendance 500 max.

Proceeds support local literacy organizations (Reading Partners, 2024, 2025)

****** invitation out to Elin Hildebrand

HERE IS A SNAPSHOT OF THE ATTENDANCE SUMMARY OF THE JANUARY 2025 WILD DUNES
AUTHOR EVENT:

Organized List of ZIP Codes by City & State (24 states)

Massachusetts

- **Westborough, MA – 01581**

New York

- **New York, NY – 10025**
- **Yorktown Heights, NY – 10598**
- **Richfield Springs, NY – 13459**

Pennsylvania

- **Pittsburgh, PA – 15216**

Maryland

- **Silver Spring, MD – 20910**
- **Ellicott City, MD – 21043**
- **Frederick, MD – 21703**

Virginia

- **Williamsburg, VA – 23185**
- **Virginia Beach, VA – 23451**

North Carolina

- **Clemmons, NC – 27012**
- **Sanford, NC – 27330**
- **Greensboro, NC – 27410**

- **Garner, NC – 27529**
- **Wake Forest, NC – 27587**
- **Willow Spring, NC – 27592**
- **Youngsville, NC – 27596**
- **Durham, NC – 27707**
- **Cherryville, NC – 28021**
- **Gastonia, NC – 28054**
- **Monroe, NC – 28112**
- **Rutherfordton, NC – 28139**
- **Waxhaw, NC – 28173**
- **Charlotte, NC – 28207, 28209, 28210, 28211, 28277**
- **Southport, NC – 28461**
- **Sunset Beach, NC – 28468**
- **Hickory, NC – 28601**

South Carolina

- **Blythewood, SC – 29015**
- **Columbia, SC – 29206, 29223, 29229**
- **Moore, SC – 29369**
- **Charleston, SC – 29401, 29402, 29403, 29407, 29410, 29412, 29414, 29418, 29425, 29429, 29433, 29439, 29451, 29455, 29464, 29466, 29470, 29482, 29483, 29485, 29486, 29492**
- **Florence, SC – 29506**
- **Little River, SC – 29566**
- **Surfside Beach, SC – 29575**
- **Murrells Inlet, SC – 29576**

- **North Myrtle Beach, SC – 29582**
- **Pawleys Island, SC – 29585**
- **Greenville, SC – 29609, 29615, 29617**
- **Belton, SC – 29627**
- **Pelzer, SC – 29645**
- **Seneca, SC – 29678**
- **Simpsonville, SC – 29681**
- **Indian Land, SC – 29707**
- **Fort Mill, SC – 29715**
- **Lancaster, SC – 29720**
- **Aiken, SC – 29803**
- **Edgefield, SC – 29824**
- **North Augusta, SC – 29860**

Georgia

- **Beaufort, SC – 29902, 29906**
- **Hilton Head Island, SC – 29926**
- **Cumming, GA – 30028, 30041**
- **Smyrna, GA – 30080**
- **Atlanta, GA – 30309, 30339**
- **Athens, GA – 30606**
- **Savannah, GA – 31405**

Florida

- **Jacksonville, FL – 32258**

Tennessee

- **Dickson, TN** – 37055
- **Johnson City, TN** – 37601, 37604
- **Bristol, TN** – 37620
- **Knoxville, TN** – 37919

Kentucky

- **Louisville, KY** – 40242

Ohio

- **Hilliard, OH** – 43026
- **Westerville, OH** – 43081
- **Mentor, OH** – 44060
- **Garfield Heights, OH** – 44125
- **Akron, OH** – 44312

Indiana

- **Carmel, IN** – 46032

Michigan

- **Bloomfield Hills, MI** – 48301
- **Plainwell, MI** – 49080

Iowa

- **Cedar Rapids, IA** – 52404

Wisconsin

- **Hartford, WI** – 53027

Minnesota

- **Edina, MN – 55424**
- **Blaine, MN – 55449**

North Dakota

- **Detroit Lakes, MN – 56501**

Illinois

- **Evanston, IL – 60201**
- **Evanston, IL (PO Box) – 60291**

Nebraska

- **O'Neill, NE – 68763**

Colorado

- **Highlands Ranch, CO – 80130**

Maine

- **Casco, ME – 04015**

Connecticut

- **Madison, CT – 06443**

New Jersey

- **Lyndhurst, NJ – 07071**
- **Pequannock, NJ – 07440**
- **Pennington, NJ – 08534**
- **Manchester, NJ – 08759**

ORGANIZED BY STATE ONLY (24 states total):

Massachusetts

01581

New York

10025

10598

13459

Pennsylvania

15216

Maryland

20910

Virginia

23185

23451

North Carolina

27012

27330

27410

27529

27587

27592

27596

27707

28021

28054

28112

28139

28173

28207

28209

28210

28211

28277

South Carolina

28461
28468
28601
29015
29206
29223
29229
29369
29401
29402
29403
29407
29410
29412
29414
29418
29425
29429
29433
29439
29451
29455
29464
29466
29470
29482
29483
29485
29486
29492

Georgia

30028
30041
30080
30309
30339
30606

Florida

31405
32258

Tennessee

37055
37601

37604
37620
37919

Kentucky

40242

Ohio

43026
43081
44060
44125
44312

Indiana

46032

Michigan

48301
49080

Iowa

52404

Wisconsin

53027

Minnesota

55424
55449

North Dakota

56501

Illinois

60201
60291

Nebraska

68763

Colorado

80130

Maine

04015

Connecticut

06443

New Jersey

07071

07440

08534

08759

Top 8 States by Number of ZIP Codes Represented

1. **South Carolina – 20 ZIP codes**
2. **North Carolina – 14 ZIP codes**
3. **Georgia – 6 ZIP codes**
4. **Tennessee – 5 ZIP codes**
5. **New York – 4 ZIP codes**
6. **Ohio – 4 ZIP codes**
7. **New Jersey – 4 ZIP codes**
8. **Virginia/Illinois/Michigan/Minnesota/Florida – TIED 2 ZIP codes**

Total Number of Attendees at the 20th Anniversary Wild Dunes Author Event & Weekend:

Sunday, January 19

- General Admission - 176
- VIP Ticket - 125

Saturday, January 18

- 11 am w/ Mary Alice - 89
- 2 pm w/ Marjory - 17
- 5 pm w/ Kwame - 62

Friday, January 17

- Kick-off Event - 114

Total Number of Survey Respondents:

- 67 respondents participated in the survey.

Number of Respondents Who Stayed on Isle of Palms for the Event:

- 34 respondents stated that they stayed on Isle of Palms for the event.

A Tally of Where These Respondents Stayed:

- **Wild Dunes Resort Hotel:** 13 respondents
- **Rental Unit Inside Wild Dunes:** 8 respondents
- **Other Rental Units on the Island:** 6 respondents
- **Stayed With a Friend on the Island:** 1 respondent
- **Stayed in Vacation Home on the Island:** 3 respondents
- **Stayed in a Hotel on the Island (not specified):** 2 respondents

Number of Attendees Visiting the Event for the First Time:

- 27 respondents indicated that this was their first time attending the event.

Additional Pertinent Information for the ATAX Committee:

1. Geographic Reach of Attendees:

- The event attracted attendees from **North Carolina, South Carolina, Georgia, Tennessee, New Jersey, Massachusetts, Connecticut, Wisconsin, Maryland, and Florida**, showing a strong regional draw.
- Local attendees from **Charleston, Mt. Pleasant, Summerville, and Seabrook Island** were also present.

2. Economic Impact on the Isle of Palms:

- With **34 out of 67** respondents staying on Isle of Palms, the event successfully generated **overnight stays**, contributing to **lodging tax revenue**.

Receipts for Wild Dunes **2024** Events

Winter 2024 Event: See attached Budget

Spring Event: \$3120.

Fall Event: \$3480.

Bag Piper \$275.

May Media \$7000.

MyLo Marketing \$5025

Author fees/gifts/dinners \$1349.75

Wild Dunes Winter **2025** \$17,700.73

Inventivenvironments \$2700.

Islander 71 \$1598.40

Firefly \$250.

Author flights \$1500.

Laura Strecker Marketing \$5502.

May Media Marketing \$7000.



5757 Palm Blvd
Isle of Palms, SC 29451
Phone 843-886-2234
Fax 843-886-2915

BILL TO:

Island School Literacy Events
Attn: Mary Alice Monroe
7 2nd Ave
Isle of Palms, SC 29451

Invoice #: 100

DESCRIPTION	#	RATE	AMOUNT
Mary Alice Monroe Authors Event			
Spring Authors Event	1	3120.00	\$3,120.00
Balance Due			\$3,120.00

Please mail checks to:
Wild Dunes Resort
5757 Palm Blvd
Isle of Palms, SC 29451
Attn: Accounting

If you have any questions, please call Allison at 843-290-2897



5757 Palm Blvd
Isle of Palms, SC 29451
Phone 843-886-2234
Fax 843-886-2915

BILL TO:
Island School Literacy Events
7 2nd Ave
Isle of Palms, SC 29451

Invoice #: 101

DESCRIPTION	#	RATE	AMOUNT
Tartan Ball	120	25.00	\$3,000.00
Bangers and Mash	120	4.00	\$480.00
Balance Due			\$3,480.00

Please mail checks to:
Wild Dunes Resort
5757 Palm Blvd
Isle of Palms, SC 29451
Attn: Accounting

If you have any questions, please call Allison at 843-290-2897

inventivENVIRONMENTS

INVOICE 1-19-25 | based on cliEnt provided information and/or site visit | payable immediately upon receipt, no later than 30 days from invoice date | payment information in notes section

cliEnt name : Mary Alice Monroe, Author Event
 event location + address : Wild Dunes Resort, (varied locations) Isle of Palms, SC 29451
 project day, date + timing : Friday, January 17-19, 2025, times vary based on event
 installation day, date + timing : Saturday, January 18-19, 2025, times vary based on event
 strike day, date + timing : Sunday, January 19, 2025, immediately following the final event
 project type : signature event "Author Event"

DESIGN + DECOR	Cost	Amt	Price
large centerpieces - grasses + blooms to emulate MA book cove	\$175.00	x 12	\$2,100.00
medium centerpieces - grasses + blooms	\$75.00	x 14	\$1,050.00
stage plants - 8' potted palms	\$150.00	x 2	\$300.00
stage backdrop - soft celadon draped fabric	\$1,750.00	x 1	\$1,750.00
signs - overall creative, design, etc. for all event signs	\$3,500.00	x 1	\$3,500.00
			\$8,700.00

RECAP OF COSTS	Cost	Amt	Price
DESIGN + DECOR			\$8,700.00
PRE-PLANNING + COORDINATION	\$2,500.00	x 1	\$2,500.00
LABOR (install + strike)	\$750.00	x 2	\$1,500.00
total			\$12,700.00
preferred cliEnt discount** received			-\$10,000.00
deposit received			\$0.00
BALANCE REMAINING:			\$2,700.00

NOTES :

payment via check to : inventivENVIRONMENTS 1996 Davant Circle, Mount Pleasant, SC 29464

Thank you for working with us. We look forward to many more projects!



5757 Palm Blvd
Isle of Palms, SC 29451
Phone 843-886-2234
Fax 843-886-2915

BILL TO:

Island School Literacy Events
Attn: Mary Alice Monroe
7 2nd Ave
Isle of Palms, SC 29451

Invoice #: 110

DESCRIPTION	#	RATE	AMOUNT
Mary Alice Monroe Authors Event			
01/17/25: Program and Sign Printing	1	833.99	\$833.99
01/17/25: Gift Baskets	1	345.76	\$345.76
01/18/25: Mary Alice Monroe Brunch	1	2861.01	\$2,861.01
01/18/25: Happy Hour with Kwame Alexander	1	2298.37	\$2,298.37
01/18/25: Authors Dinner at Coastal Provisions	1	199.70	\$199.70
01/19/25: Authors Main Event	1	10707.71	\$10,707.71
01/18/25: Staff Lunch and Drinks	1	217.25	\$217.25
01/18/25: F&F Book Club	1	76.94	\$76.94
1/18/25: Poetry Event	1	160.00	\$160.00
Balance Due			\$17,700.73

Please mail checks to:
Wild Dunes Resort
5757 Palm Blvd
Isle of Palms, SC 29451
Attn: Accounting

If you have any questions, please call Allison at 843-290-2897

FINAL SUMMARY

MARY ALICE MONROE EVENT - JANUARY 2025

Buxton Books

TICKETING

SUNDAY - JANUARY 19, 2025

MAIN EVENT

VIP

TICKETS SOLD	126		TICKETS REDEEMED	106	
COST			\$ 155.00	DUE TO BUXTON BOOKS	DUE TO ISLE
TICKET INCOME			\$ 19,530.00		
BOOK INCLUDED BY BUXTON	MSRP	SALES TAX	TOTAL COST	QTY	
WHY FATHERS CRY AT NIGHT	\$ 28.00	\$ 2.52	\$ 30.52	126	\$ 3,845.52
THE STOLEN LIFE OF COLLETTE MARCEAU	\$ 28.99	\$ 2.61	\$ 31.60	126 shipped	\$ 3,981.49
THE STORY SHE LEFT BEHIND	\$ 29.99	\$ 2.70	\$ 32.69	126 shipped	\$ 4,118.83
1st Edition Hardcover - Where the Rivers Merge by Mary Alice Monroe	\$ 30.00	\$ 2.70	\$ 32.70	126 shipped	\$ 4,120.20
BACKLIST - DONATED BY MAM	\$ -	\$ -	\$ -	126	\$ -
SHIPPING CHARGES	\$ 21.00			126	\$ 2,646.00
BUXTON BOOKS OVERHEAD FEE \$5	\$ 5.00			126	\$ 630.00
TOTALS DUE TO EVERYONE					\$ 19,342.03 \$ 187.97

SUNDAY - JANUARY 19, 2025

MAIN EVENT

TICKETS SOLD	182		TICKETS REDEEMED	154	
COST			\$ 70.00	DUE TO BUXTON BOOKS	DUE TO ISLE
TICKET INCOME			\$ 12,740.00		
BOOK INCLUDED BY BUXTON	MSRP	SALES TAX	TOTAL COST	QTY	
WHY FATHERS CRY AT NIGHT	\$ 28.00	\$ 2.52	\$ 30.52	26	\$ 793.52
THE STOLEN LIFE OF COLLETTE MARCEAU	\$ 28.99	\$ 2.61	\$ 31.60	45 shipped	\$ 1,421.96
THE STORY SHE LEFT BEHIND	\$ 29.99	\$ 2.70	\$ 32.69	46 shipped	\$ 1,487.35
1st Edition Hardcover - Where the Rivers Merge by Mary Alice Monroe	\$ 30.00	\$ 2.70	\$ 32.70	65 shipped	\$ 2,125.50
SHIPPING CHARGES	\$ 7.00			156	\$ 1,274.00
BUXTON BOOKS OVERHEAD FEE \$5	\$ 5.00			182	\$ 910.00
TOTALS DUE TO EVERYONE					\$ 8,012.33 \$ 4,727.67

GRAND TOTAL RECAP

	TO BUXTON	TO ISLE
KICK OFF EVENT	\$ -	\$ 1,200.00
BOOKS & BRUNCH	\$ 3,970.00	\$ 1,430.00
WRITING POETRY FOR SPECIAL OCCASIONS	\$ -	\$ 300.00
COCKTAILS & CONVERSATIONS	\$ 666.34	\$ 1,373.66
Main Event - General Admission	\$ 8,012.33	\$ 4,727.67
Main Event - VIP	\$ 19,342.03	\$ 187.97
TOTAL DUE	\$ 31,990.71	\$ 8,019.29

- * Buxton Books to pay publishers wholesale cost of the books plus shipping for the returns
- * Buxton Books donated \$630 worth of tote bags for the VIPs
- * Actual cost of shipping each book is \$8.66 (Buxton is absorbing the \$1.66 x 634 books = \$1052.44)

FINAL SUMMARY

MARY ALICE MONROE EVENT - JANUARY 2025

FRIDAY - JANUARY 17TH, 2025

FRIDAY KICK OFF EVENT

TICKETS SOLD	120	TICKETS REDEEMED			
COST		\$ 10.00	DUE TO BUXTON BOOKS	DUE TO ISLE	
TICKET INCOME		\$ 1,200.00	\$ -	\$ 1,200.00	
TOTALS DUE TO EVERYONE			\$ -	\$ 1,200.00	

SATURDAY - JANUARY 18, 2025

BOOKS & BRUNCH - 11AM / INDIGO ROOM & ROOFTOP

TICKETS SOLD	100	TICKETS REDEEMED			84
COST		\$ 54.00	DUE TO BUXTON BOOKS	DUE TO ISLE	
TICKET INCOME		\$ 5,400.00			
BOOK INCLUDED BY BUXTON	MSRP	SALES TAX	TOTAL COST	QTY	
1st Edition Hardcover - Where the Rivers Merge by Mary Alice Monroe	\$ 30.00	\$ 2.70	\$ 32.70	100 shipped	\$ 3,270.00
SHIPPING	\$ 7.00			100	\$ 700.00
TOTALS DUE TO EVERYONE					\$ 3,970.00 \$ 1,430.00

SATURDAY - JANUARY 18TH, 2025

WRITING POETRY FOR SPECIAL OCCASIONS

TICKETS SOLD	20	TICKETS REDEEMED			14
COST		15	DUE TO BUXTON BOOKS	DUE TO ISLE	
TICKET INCOME		\$ 300.00	\$ -	\$ 300.00	
TOTALS DUE TO EVERYONE			\$ -	\$ 300.00	

SATURDAY - JANUARY 18TH, 2025

COCKTAILS & CONVERSATIONS

TICKETS SOLD	68	TICKETS REDEEMED			47
COST		\$ 30.00	DUE TO BUXTON BOOKS	DUE TO ISLE	
TICKET INCOME		\$ 2,040.00			
	MSRP	SALES TAX	TOTAL COST	QTY	
SIGNED PAPERBACK OF THE DOOR OF NO RETURN	\$ 8.99	\$ 0.81	\$ 9.80	68	\$ 666.34
TOTALS DUE TO EVERYONE					\$ 666.34 \$ 1,373.66

2024

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

ATTACHMENTS:

[1] EXPENSE SUMMARIES (SPREADSHEET)

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

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

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

2023 BUDGET AND EXPENSES FOR WILD DUNES AUTHOR EVENT

From Ticket Sales

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

\$30,925.83

Assistant Expenses \$3000.

Airfare \$1000.

Total: \$34,925.83