



Accommodations Tax Advisory Committee

10:00 a.m., Wednesday, April 15, 2026

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 meeting's minutes – March 11, 2026** (p2)
3. **Presentation of ATAX Applications**
 - a. YWCA Greater Charleston MLK Event Application – LaVanda Brown (p26)
4. **Financial Statements** (p5)
5. **Old Business**
 - a. Consideration of ATAX Applications
 - i. IOP Chamber of Commerce – Zacharry Lary (p13)
 - ii. Lutheran Coastal Retreat Center – Elliot Cox (p19)
 - iii. Island School Literacy Events – Mary Alice Monroe (p35)
 - iv. YWCA Greater Charleston MLK Event Application – LaVanda Brown
6. **New Business**
 - a. Discussion of FY27 Budget for State Accommodations Tax Funds (p68)
7. **Miscellaneous**

Next meeting: Wednesday, May 13, 2026 at 10am

7. Adjournment



ACCOMMODATIONS TAX ADVISORY COMMITTEE

10:00am, Wednesday, March 11, 2026

1207 Palm Boulevard, Isle of Palms, SC

MINUTES

1. **Call to order**

Present: Rebecca Kovalich, Park Williams, Barb Bergwerf, Chrissy Lorenz, Margaret Miller, Mike Boykin (via Zoom)

Absent: Rod Turnage

Staff Present: Administrator Kerr, Director Hamilton

2. **Election of Chair and Vice Chair**

Ms. Bergwerf nominated Mr. Williams as Chair of the ATAX Committee. Ms. Lorenz seconded the motion. There being no other nominations, a vote was taken with all in favor of Mr. Williams as Chair of the ATAX Committee.

Ms. Lorenz nominated Ms. Kovalich as Vice Chair of the ATAX Committee. Ms. Bergwerf seconded the motion. There being no other nominations, a vote was taken with all in favor of Ms. Kovalich as Vice Chair of the ATAX Committee.

3. **Approval of previous meeting's minutes** – November 12, 2025

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

4. **Presentation of ATAX Applications**

A. **IOP Chamber of Commerce, Zacharry Lary**

Mr. Lary came before the Committee to present the IOP Chamber's request for \$55,000 in ATAX funding. He shared creatives and data from a previous campaign as well as the budget for the project and estimated economic benefit to the Isle of Palms. The Chamber is requesting \$55,000 to replicate and expand on this pilot project. Mr. Lary explained that while the CVB does an excellent job of promoting the Charleston area, the IOP Chamber is solely focused on promoting the Isle of Palms.

Committee members asked if there is a way the CVB can financially assist the IOP Chamber.

Committee members also requested a means by which the Committee could review the use of previously awarded funds. A January meeting will be added to the ATAX meeting schedule to invite the previous year's grant recipients to provide an accounting of ATAX funds.

B. YWCA Greater Charleston MLK Event Application – LaVanda Brown

No one from the YWCA was present to review their application.

C. Lutheran Coastal Retreat Center -- Elliot Cox

Mr. Cox came before the Committee to present the retreat center's request for \$12,000 in ATAX funding. Mr. Cox said their request is for the installation of new and updated reservation software and future subscription fees, noting the last software purchase was in 2012. Mr. Cox said while some of their groups bring their own food, many of them eat at least one meal on the island.

Mr. Williams asked if such software is an eligible expense, and Director Kerr later (after the meeting) provided documentation that it is an eligible expense.

Mr. Cox shared some details of the center's use of last year's grant award.

D. Island School Literacy Events – Mary Alice Monroe

Ms. Monroe and Ms. Polly Buxton came before the Committee to present her organization's request for \$40,000 in ATAX funding. Ms. Monroe said prior ATAX funding has allowed them to take her weekend event "to a whole new level." She has increased the management of the event, allowing for expanded direct marketing. Her weekend event and the other seasonal events are all sold out.

Ms. Buxton shared details of their marketing efforts, stating the event attracted people from 78 zip codes over 50 miles away from 28 states. The weekend event has received a lot of media attention.

Ms. Lorenz and Ms. Bergwerf both said this event is a success story of ATAX grant funding.

5. Financial Statements

Director Hamilton said the fund balance is 3.5% higher than this time last year. Revenues are 2% higher, but interest earned is down due to lower interest rates. Expenses are tracking at 41% of the annual budget.

She noted a few budgeted items will be deferred to FY27. There will be an expense overage for the ATV purchase that will come before the Committee at a later meeting.

6. Old Business

A. Update on BCDCOG Mobility Study

Administrator Kerr reported that BCDCOD is continuing to work on the final report of this study.

Ms. Bergwerf said there are several beach paths that flood. She believes some of them may need some grading for the flood waters to recede. Administrator Kerr asked her to send pictures of the paths that need attention.

7. New Business

A. Discussion of FY27 Budget for State Accommodations Tax Funds

Director Hamilton said the budget requests for FY27 are very similar to those in FY26. She noted increases in transfers out of the ATAX funds to pay for the upcoming beach renourishment project. She reviewed the expenses in the FY27 budget.

There was a brief discussion about safety measures at the marina boat ramp.

6. Miscellaneous Business

Administrator Kerr said the City has solicited proposals for a rebranding effort. The Committee has been asked to grade the proposals. This will likely be on the May agenda. The rebranding effort will be paid for by the CVB.

The next meeting of the ATAX Committee will be Wednesday, April 15, 2026 at 10am.

7. Adjournment

Ms. Bergwerf made a motion to adjourn, and Ms. Lorenz seconded the motion. The meeting was adjourned at 11:16am.

Respectfully submitted,

Nicole DeNeane
City Clerk

**City of Isle of Palms
State Accommodations Tax
Balance Sheet
as of March 31, 2026**

	3/31/2025	3/31/2026
CASH @ TRUIST	\$ 203,395	\$ 268,309
CASH @ SC LOCAL GOVERNMENT INVESTMENT POOL	5,885,442	6,045,472
ACCOUNTS RECEIVABLE	-	10,833
AMOUNTS DUE FROM OTHER FUNDS	-	-
	<hr/>	<hr/>
TOTAL ASSETS	6,088,837	6,324,614
	<hr/>	<hr/>
ACCOUNTS PAYABLE	19,078	(2,330)
AMOUNTS DUE TO OTHER FUNDS	84,172	-
	<hr/>	<hr/>
TOTAL LIABILITIES	103,251	(2,330)
	<hr/>	<hr/>
FUND BALANCE Beginning	4,893,009	5,754,886
Excess Revenues Over/(Under) Expenditures	1,092,577	572,059
FUND BALANCE	5,985,586	6,326,945
	<hr/>	<hr/>
TOTAL LIABILITIES & FUND BALANCE	\$ 6,088,837	\$ 6,324,615
	<hr/>	<hr/>

City of Isle of Palms
State Accommodations Tax
Revenue Statement for the 9 Months Ending March 31, 2026
Fiscal Year Ending June 30, 2026

Type	Description	FY2026 YTD Balance	FY2026 Annual Budget	Variance (Actual to Budget)
Revenues				
	September Quarterly Payment from State	1,469,280	2,329,344	(860,064)
	December Quarterly Payment from State	579,630	1,075,082	(495,452)
	March Quarterly Payment from State			
	June Quarterly Payment from State			
	YTD Interest Income	169,241	166,348	2,893
Grand Total		2,218,151	3,570,774	(1,352,623)

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2026
Fiscal Year Ending June 30, 2026

Vendor	Description	A	B	C	B+C-A
		FY2026 YTD Balance	FY2026 Annual Budget	Committee Approved	Variance (Actual to Budget)
Public Restroom Operations					
Dominion	YTD electricity for restrooms	486	750		
IOP WSC	YTD water & irrigation	7,361	12,500		
Blitch, Steady Hands Painting, AAA Fence Co. etc.	YTD maintenance	9,264	45,000		
Port City Paper	YTD paper & cleaning supplies	4,385	11,000		
SCMIRF/Wright Flood	YTD property & flood insurance	9,238	10,940		
Irrigation By Design	YTD Backflow Testing		80		
Quality Touch Cleaning	YTD cleaning	20,935	40,000		
IOP Payroll	YTD attendant	16,085	30,465		
		67,754	150,735		82,981
Beach Barrel & Front Beach Business District Trash Pickup					
JLG Enterprise LLC	YTD trash pickup per contract				
		38,952	85,000		46,048
Irrigation at Breach Inlet Sign					
IOP WSC	YTD irrigation				
		315	400		85
Non- Capital					
Maintain Benches at Parks			5,000		
Beach Wheelchairs and Maintenance			1,000		
		-	6,000		6,000
Beach Trash Barrels					
Beach Trash Cans		2,333	7,500		
		2,333	7,500		5,167
IOP Promotions & Events					

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2026
Fiscal Year Ending June 30, 2026

Vendor	Description	A	B	C	B+C-A
		FY2026 YTD Balance	FY2026 Annual Budget	Committee Approved	Variance (Actual to Budget)
Connector Run		7,500	7,500		
Easter Egg Hunt		2,771	4,500		
Music Events			4,500		
		10,271	16,500		6,229
Programs & Sponsorship					
Provisional Events Approved By Committee			75,000		
Island School Literacy		35,000			
SC Lutheran Retreat Center		10,000			
YWCA		5,000			
July 4th Fireworks		22,707	51,000		
		72,707	126,000		53,293
Charleston CVB - 30% Tourism Promotion Funds					
Charleston Area CVB	30% distribution for Sept Qtr	463,983			
Charleston Area CVB	30% distribution for Dec Qtr	183,041			
Charleston Area CVB	30% distribution for Mar Qtr				
Charleston Area CVB	30% distribution for Jun Qtr				
State Mandated 30% Transfer			1,007,081		
CVB Quarterly Shared Payroll			34,000		
		647,024	1,041,081		394,057
Tourism Promotion Funds					
City Hall's Visitor T-Shirt/Promotions	CVB Shared Payroll Paid By CVB & Credit for Walkability Study	(43,081)	15,000		
Walkability Study		19,403			
		(23,678)	15,000		38,678
Transfer to IOP Marina for 75% of Bond Debt Service					
Isle of Palms Marina Enterprise Fund			249,864	-	249,864

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2026
Fiscal Year Ending June 30, 2026

Vendor	Description	A FY2026 YTD Balance	B FY2026 Annual Budget	C Committee Approved	B+C-A Variance (Actual to Budget)
Police					
	Body Armor	3,558	7,500		
		3,558	7,500		3,942
Capital Outlay					
Police					
	ATV	25,242	22,000		(3,242)
	Speed Radar & Trailer	19,009	20,000		991
	PSB Gate	5,043	6,000		957
	Computer Server	-	18,000		18,000
		49,293	66,000	-	16,707
Fire					
	Thermal Imaging Camera	8,566	20,000		
	Rescue Boat		100,000		
	PSB Gate	5,040	6,000		
		13,605	126,000		112,395
Public Works					
	Waterway Blvd Multi-Use Path		520,000		
	1/3 Rear Loader Garbage Truck	102,569	106,667		
		102,569	626,667		524,098
Recreation					
	Reconstruct 2 Tennis Courts		65,000		
	Playground Equipment	4,623	20,000		
		4,623	85,000		80,377
Front Beach & Restrooms					
	To Repair 4500 Linear Ft of Sidewalk		70,000		

State Accommodations Tax
Detailed Expense Statement for the 9 Months Ending March 31, 2026
Fiscal Year Ending June 30, 2026

Vendor	Description	A	B	C	B+C-A
		FY2026 YTD Balance	FY2026 Annual Budget	Committee Approved	Variance (Actual to Budget)
Resurface City Owned Parts of Ocean Blvd			25,000		
		-	95,000		95,000
Fire Dept Debt Service on 75' Ladder Truck					
Truist Govt Finance	75' Ladder Truck - Principal		85,483		85,483
	75' Ladder Truck - Interest		6,431		6,431
		-	91,914	-	91,914
Unexpended Projects/Miscellaneous					
	GF-Public Relations & Tourism Coordinator	23,170	42,101		
	GF-Firefighters (3)	294,126	294,127		
	GF-Paramedics (3)	339,470	339,470		
	GF-Police Officer (2)		212,427		
	GF-ALL Beach Service Officers & Marina Parking Attendant		60,027		
	GF-Police Overtime		20,000		
	GF-SRT Coordinator		79,224		
	GF-Code Enforcement Officer		80,077		
	MF-Beach Run Sponsorship		3,000		
	MF- Marina Green Space		50,000		
	Miscellaneous		1,000		
		656,766	1,181,453		524,686
Grand Total		1,646,092	3,977,614	-	2,085,449

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	399,770	1,276,190	3,789,601	7%
FY26	1,552,861	616,386			2,169,247	3%

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	118,056	380,982	1,129,380	7%
FY26	463,983	183,041			647,024	3%

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.

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 three prior 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: 4/1/26 - 3/31/27 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:

(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 _____
 - 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
6. In the event City of Isle of Palms grants your project/event ATAX grant in the future. 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: nicoled@iop.net

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

A. Project Name: *Coastal Retreat Guest Registration Software Grant Request*

B. Applicant Organization:

1. Mailing Address: *South Carolina Lutheran Retreat Centers*
6053 Two Notch Road
Batesburg-Leesville, SC 29070

Telephone: *803-532-3183*
Email: *contactus@sclrc.com*

Website: *www.sclrc.com*

2. Project Director: *Rev. Mary M. Finklea*

Telephone: *843-687-7425*

Email: *mary@sclrc.com*

3. Description of Organization, its goals and objectives:

__South Carolina Lutheran Retreat Centers is a 501(c)(3) nonprofit organization of the SC Synod, ELCA. Our mission is providing holy spaces for God to change lives. We host retreats, camps, and conferences at Coastal Retreat Center 2101 Palm Blvd, Isle of Palms. We welcome hundreds of people to Isle of Palms every year as guests at our facility. More groups than ever are utilizing our spaces, including school groups, congregations, youth organizations, and community programs. We often host multiple groups at the same time, making the most of our available spaces.

C. Description and Location of Project:

__Enabling a smooth and seamless registration process ensures guests have a satisfactory experience, which makes repeat business more likely. People have extremely high expectations nowadays and it is important to meet or exceed them. We would like to use these funds for new and updated guest registration software. This will allow us to improve the overall efficiency at which we can schedule groups to stay with us at Coastal Retreat on the Isle of Palms. Our current reservations software (Kinetic Express) was implemented in 2012 as a server-based application. In the past 14 years, there have been vast

improvements within the booking management sector that we can take advantage of to increase our guest usage and retreat center management.

Single Event

Ongoing Event/Annual Need

1. Date of project/event start date: *__Summer of 2026*

Completion Date: *__Ongoing*

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: *__76_ %*
Visitors from within 50 miles: *_23_ % (includes locals)*

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

__We had 115 separate reservations for Coastal Retreat in 2025. Of those 115 reservations, 57 were booked by groups whose address is more than 50 miles away. 20 were booked by groups whose address is under 50 miles away. 38 were booked by individuals of which 31 have addresses that are more than 50 miles away. This information was pulled from our 2025 reservation records. Better software will allow for more nuanced reports and help us with our advertising.

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?

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

__As we are at full capacity during some of the summer season, we hope to grow our offseason numbers and increase usage during mid-week. We anticipate continued growth to the benefit of our community. By encouraging and providing mid-week reservation and spreading out usage, this increases usage while minimizing strain on island resources and limits congestion during peak times.

4. Is your event to be conducted entirely on Isle of Palms?

If not, please set forth the percentage occurring on IOP, as well as the specific locations and the percentages occurring elsewhere.

__While SCLRC includes Camp Kinard in Batesburg-Leesville and Coastal Retreat at IOP, this software will be especially helpful in guest relations in reserving spots at Coastal Retreat.

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

__Our work is similar to others in the way that many places offer hospitality and a place to sleep on the island. However, our work is unique in that we can provide groups or individuals 20 rooms at a reasonable cost which allows common, everyday folks access to incredible island experiences. We are good

stewards of IOP ATAX funding and provide visitors with memorable experiences that ensure a return visit, growing our clientele as well as benefiting the local community.

6. Set forth fully the successes and failures you have experienced for your proposed project for which you seek IOP 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 IOP.

__ Our current system is 14 years old and does not always work effectively and efficiently. A new system will allow guests to gain confidence that their visit to IOP will be an easy, joyful experience. We know that a new system will benefit staff, leaving more time to serve guests. Another way we can evaluate the success of the new software system is through the evaluations guests complete.

7. Describe fully how and why your proposed project/event qualifies for IOP ATAX funding.

__ Coastal Retreat hosts hundreds of overnight visitors every year, which contributes to our IOP economy, along with numerous guests who visit on a daily basis. Many of our retreat programs bring in out of state guests as well as folks from within South Carolina. We continue to promote civic and cultural gatherings that bring people together.

Our facility served as an impromptu Town Hall during Hurricane Hugo, and throughout the years, during emergency weather, we have been a trusted partner for the community. It might not seem as if local community support and tourism are directly related, but I believe they are. Strengthening our local engagement also bolsters a healthy, resilient community that can welcome others. While guest registration software is not as visible as other infrastructure projects, it has a significant impact on guest relations and increases our capacity, while indicating a high standard of care.

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

__ We are a nonprofit organization.

If not, please explain fully, and include what you will do with the money. Note: It is impermissible to donate or "Pass through" City of IOP ATAX Grants to any other organization, except as authorized by City of IOP. Further, the City of IOP 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 IOP. Excess funds must be returned to the City of 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.

__ \$12,000 will go towards the purchase of the new registration software including installation and its first annual subscription. If the costs exceed the twelve thousand dollar grant, we would use money from our annual fund and donations from our donors to supplement the fees.

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 IOP, ie. those incurring accommodations taxes for lodging. Include the lodging providers addresses, phone numbers, rooms utilized, costs and nights stayed.

__ We are the lodging provider.

-Where do you project tourists for this year’s project to spend the night (ie. lodging for those expected to pay accommodation 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 is expected to be booked, etc.

__ Our guests stay overnight at our facility at 2101 Palm Blvd.

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

__ Guest registration software is part of the “welcome mat” that people first encounter when visiting our location. Having a hospitable, forward-looking initial encounter enables guests to have a positive first impression. We know that first impressions stick in guests’ memories, and we want that initial encounter to be positive. We regularly maintain and update our policies and procedures to better serve tourists who come to us. The entire \$12,000 requested will go towards this project. A capacity investment will also enable our staff to have an improved work-flow while simultaneously allowing us to better steward the limited lodging resources we have available through the year.

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

__ 2025: Approximately 115 group reservations; while we are unable to determine individual room records with our current software, the new software would provide this information. Each year our numbers have increased.

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

2026: Our 2026 group reservations goal would be 120.

5. Is the project/event for which you seek City of IOP 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?

NA; Our request benefits year-round visitors.

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 IOP.

NA; The number of visitors is already dictated by the size of our building and the rooms previously zoned for renting.

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 project costs involved.

Most information can be found on our website. Our plan that will help to increase tourism because of our newly refurbished registration software includes quick implementation. As soon as we have the funds, we will be able to purchase the software and execute the new system which would have an immediate effect on guest experience. Having happy guests also serves as its own continual advertising, as repeat clientele is just as important as welcoming new guests. We are currently seen as a good steward of what is placed in our care and this only increases our reputation as a good neighbor.

F. Funding

Sources of income for this project/event (Please attach all supporting documents.)

1. Sponsorships of Fundraising: Amount: \$__ From: __

2. Entry Fees: Amount: \$__ From: __

3. Donations: Amount: \$__ From: __

4. Accommodations Tax Funds Request: Amount: \$ 12,000

Dates Required: __ Whenever Possible Lump Sum: __ Preferred Installments:

5. Other

__Should we not be successful in receiving this grant from the City of IOP, we would be turning to our donor base, or continuing with the 14 year old software.

6. Total Funding: *__\$12,000* Total Budget: *__\$12,000*

G. Financial Analysis

Please provide a line item budget for your project/event

\$12,000 for software implementation and annual subscription

If awarded, IOP ATAX Funds are requested as follows:

1. Lump Sum: *__\$12,000 on whenever possible*
2. Payment of invoices as submitted to City Staff. Invoices should be submitted at least two weeks prior to due date.

H. Miscellaneous

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

- Festival
- Marketing
- Other; Please explain.

__This is a capacity building request that strengthens infrastructure to maximize guest satisfaction.

2. Have you reached out to the City of IOP 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 who?

__We received funds last year for our parking lot and were strongly encouraged to build upon this relationship. We were patient when funds were delayed due to an administrative oversight, and I believe we are a respected and trusted community partner. The committee seemed to enjoy its interactions with Resident Director Elliott Cox, who along with his wife and three children, live next door to Coastal Retreat.

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

__This question is answered under Section F: Funding.

4. Does your project/event have applicable liability insurance to include the City of IOP, 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 IOP, its employees and agents as a result of your project/event. A minimum of \$300,000 liability insurance is typically required unless that requirement is specifically waived in writing by the City of IOP in its sole discretion. If there is applicable insurance, do you commit to making the City of IOP, 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 IOP, its employees and agents are additional insured (s) for your project/event.

NA.

5. Do you assert that the project/event for which you seek City of IOP ATAX funding is sustainable in the future? Please explain.

Having the funding for the initial implementation and the beginning annual subscription will be significantly helpful. Later subscription costs would be covered in our annual budget.

6. In the event City of IOP 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, we acknowledge funds would never be spent on the purchase of alcohol or tobacco products.

7. In the event your project/event is awarded City of IOP 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 IOP all ATAX grant money received absent extraordinary circumstances and within the sole discretion of the City of IOP? Do you agree?

YES.

8. In the event your project/event is granted City of IOP ATAX grant funding, you must and do hereby agree by the filing of your application personally to hold harmless and indemnify the City of IOP, 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.

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

You would be listed in our annual report as a generous benefactor and loyal supporter. Thank you! We very much appreciate the ATAX funding returning to the community in order to strengthen our hospitality to new and returning guests to this amazing place we call home!

Thank you so much for your thoughtful consideration!

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 Accomodatoins. 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 Junior Tribute Week
VIP Reception

B. Applicant Organization: YWCA Greater Charleston(YWCAGC)

1. Mailing Address: PO Box 80935 Charleston SC 29416

Telephone: 843-722-1644 Email: LBrown@ywca-charlestonSC.org

2. Project Director: Lavanda Brown

Telephone: 843-722-1644 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 our mission, we are the organizer of the Charleston Region's Rev. Dr. Martin Luther King, Jr. Tribute (MLK) and have been doing so for 54 years.

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? In 2026 we saw an increase in registrants by 10%, however attendance was the same. During the event we did get several emails and texts that the weather was preventing some folks from attending.

*Source of tourist data Registration forms and sign-in sheets.

(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. Explore Charleston along with the Sweetgrass Inn have agreed to help support this event once again, 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

Revised February 8, 2021

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. _____

Feedback indicates that the event is a welcomed and anticipated component of the MLK tribute. The partnership with Loews, Wild Dunes, and Explore Charleston has been a pleasure to coordinate and continue to learn. Marketing continues to be an area where we learn the most and make the most significant changes.

7. Describe fully how and why your proposed project/event qualifies for City of Isle of Palms ATAX funding. YWCAGC's MLK multi day events is now in its 54th. 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.
YWCAGC 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 YWCAGC 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. In year two, 2025, we had our first experience with securing lodging on the Island at The Sweet Grass Inn. That year we secured 2 rooms, 4 guests. In 2026, our second year arranging for a room block for lodging, we secured 3 rooms, 6 guests. We continue to revamp our marketing plan, initiate our plan much earlier, and invite more speakers and program participants from out of the tricounty strategically to encourage overnight stays for 2026. We have not developed a plan for gathering data for lodging at other IOP establishments but will work with our partner at Explore Charleston for advice on collecting that data if possible.

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 an increase in attendees and stays in 2027 from 2026.
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 has evolved into a much-anticipated event during the week-long tribute. We believe that this event could be the catalyst for IOP becoming a winter 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. Based on history we expect 100 attendees. Approximately 30% will be public attendees, the other 70% will come from YWCA top sponsors, donors, supporters and special guests.

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. The majority of attendees come from 15+ miles away. Some may be visiting the Island for the first time. The charm and beauty of the island will encourage even those who are just across the bridge but rarely visit to make a quick day or overnight trip to IOP for all it has to offer.
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 an average of 5-7 media appearances to an average of 8-10 including local networks, print, and radio. In the last year our engagement through Facebook increased by 66%, Instagram by 45%, and our website traffic increased by 35%. 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 and The Post and Courier for targeted advertising to their constituents.

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

1. Sponsorships or Fundraising: Amount \$43,000 From Wild Dunes Resort
2. Entry Fees : Amount \$ _____ From _____
3. Donations: Amount \$ _____ From _____
4. Accommodations Tax Funds Request: Amount \$10,000

Date(s) Required: 11/1/2026 Lump Sum Installments _____

YES

5. Other:

6. Total Funding: \$43,000 Total Budget: \$53,500

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

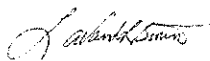
Room rental/Food and Bev \$43,500
Marketing/Communications - \$3,000
Photography/AV - \$2,500
Administrative oversight (logistics, reminders, event coordination) - \$2,000
Branded collateral - \$1,500
Invitations/mailing - \$1,000

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

Revised February 8, 2021

Respectfully submitted by



Lavanda Brown

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

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

H. Miscellaneous

1. In what category do you place your project/event and why?
 - Festival _____
 - Marketing _____
 - Other (Please Explain): _____
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?

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. _____
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. _____
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. _____
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? ____ 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? ____ 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.

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: Literary Series Founded by Mary Alice Monroe

B. Applicant Organization: Island School Literacy Events (ISLE Non Profit)

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

Telephone: 8433274270 Email: maryalice@maryalicemonroe.com

2. Project Director: Mary Alice Monroe and Polly Buxton

Telephone: 8436965050 Email: mam@buxtonbooks.com

3. Description of Organization, Its Goals and Objectives:

Maintain the presence of the January Wild Dunes Author's Series

as we welcome the 22nd annual event in 2027. We look to

fine tune the event offerings to make Isle of Palms a destination
vacation destination.

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? yes 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.
See addendum.

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

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

E. Marketing Plan

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

See addendum.

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

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

2. Entry Fees : Amount \$ _____ From _____

3. Donations: Amount \$ _____ From _____

4. Accommodations Tax Funds Request: Amount \$ _____

Date(s) Required: _____ Lump Sum _____ Installments _____

5. Other:

6. Total Funding: _____ Total Budget: _____

G. Financial Analysis

Please Provide a Line Item Budget for your project/event

See attached.

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

(1) Lump Sum(s): \$ 40,000.00 on July 1, 2026 (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 events.
 - 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. See attached.
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.
n/a
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.

_____See attached._____

ATTACHED ANSWERS TO ATAX QUESTIONS:

C. Description and Location

1. Dates of project/event: July 1, 2026-June 30 2027.

The Wild Dunes Authors 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 Fall events are one-day events and attract a smaller crowd of 100-125 guests. All events celebrate literature and continue to solidify the Isle of Palms as a year round literary destination for regional and national travelers as well as locals.

2. Impact on Tourism:

The percentages were calculated from our feedback survey emailed to all attendees. We received responses back from 91 guests. Additionally, we use the ticketing platform, Bold Type Tickets, to export billing address information to compile the data included in the addendum. 85% of the attendees that stayed for the event two or more nights- generating a total of fifty room nights, plus meals and activity expenditures on the island. We see an opportunity for more growth attendees staying multiple nights.

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

3. Increase/Decrease in Attendance Over Three Years:

In 2024 we sold out every event with waiting lists for both summer and winter gala events. For the 2025 winter authors weekend, a major author cancelled, and although we saw a slight drop in attendance, we still had a full house and highly successful weekend. In 2026 we saw a significant increase in ticket sales with 450 tickets sold with an additional 39 complimentary guests. 197 tickets were sold for Saturday events which were all at capacity. Ticket sales are trending up year after year. Lodging data available from Wild Dunes including use of a promo code indicates an increase of overnight stays for the author's weekend.

*Source of tourist data: Survey Monkey survey, Bold Type Tickets, Wild Dunes reservation feedback, written communication feedback from guests.

4. Yes

5. No

6. Successes and Failures:

2020: 425 tickets

2021: cancelled due to covid

2022: 353 tickets sold but refunded / cancelled due to covid

2023: SOLD OUT 500 tickets plus an additional 128 tickets sold for Saturday events

2024: SOLD OUT 425 tickets (lowered maximum capacity for a better guest experience) +168 tickets for Saturday events + a sold out Friday night locals event at Islander 71

2025: Numbers were down to 301 tickets for Sunday (due in part to author cancellation). 168 additional tickets were sold for Saturday events + over 100 for Friday night for a very impressive 560+ tickets for the weekend.

2026: SOLD OUT for Sunday's event as well as Saturday events: 450 + on Sunday and 197 tickets on Saturday + a full house for the Friday night locals event at Islander 71.

We are dedicated to continuing the year to year growth and seek to increase the percentage of overnight stays at all events by amplifying booking information with all ticketing descriptions as well as in confirmation letters. We will continue to bring nationally recognized literary events to the island with an increased focus on encouraging overnight stays by adding more value added opportunities to the attendees for staying overnight on the island. We are also continuing the intentional timing of events to encourage dining and staying on the island. We are proud of the reputation we have built with 21 years of successful events that continue to grow annually in numbers, scope, and nationally notoriety.

7. Project ATAX Qualifications:

We are in our third decade of the literary series on Isle of Palms and have hosted a stellar list of nationally recognized authors to establish Isle of Palms as a year round literary event destination. ATax funding from the Isle of Palms has

provided incentive and means to gather essential data to help determine our course forward. We are proceeding with intention and measures to continue serving the community while growing the scope and breadth of the events. We actively seek to solidify Isle of Palms as a nationally recognized destination event for each season (both fly and drive markets) as well as a "stay-cation" for locals.

The event has grown from its origins of 50 people to over 500 pp for the flagship weekend event. We are extremely proud of the ongoing, increased success of the event and how it is rooted firmly on the Isle of Palms.

Each year, a growing number of attendees are choosing to stay one or more nights on the isle of Palms. We will continue to encourage tourists to spend the night on the island and explore more of what the Isle of Palms has to offer. We plan to meet with more businesses on the island to explore additional opportunities to benefit Isle of Palms businesses, restaurants, and tourist attractions and activities - particularly during the quieter winter months.

We anticipate the flagship winter weekend event in January to continue to sell out and bring 500 people to the island. We are creatively adding new incentives to get more of them to stay two or more nights. Please note that the other seasonal events are smaller (around 100 people each) and usually on a weekday in order to not overcrowd during the warmer month weekends.

This literary event is receiving more and more national attention each year.. This upward trend (thanks in part to the ATAX grant) has allowed I.S.L.E. to firmly establish Isle of Palms as a literary destination through the Wild Dunes Literary Series with Mary Alice Monroe.

8. Yes

9. See attached: Bold Type Ticketing Revenue, Invoices, Projected Budget, Receipts

D. Financial Justification

1.

Via surveys, Ticketing data from Bold Type Tickets, and Lodging Data from Wild Dunes, Data confirms significant out of area draw that directly aligns with goals of promoting tourism beyond our local market. The number of attendees traveling from zip codes more than 50 miles away is continuing to trend upward and that the percentage of guests staying 1 to 3 nights on the island is also trending upwards.

- Attendees from 24 states.
- 78 zip codes located more than 50 miles away.
- The top six states represented were: SC, NC, GA, NY, TN, ME
- 35 (1/3) respondents to the survey said this was their first time attending the series indicating continued growth and new visitor acquisition.

1. See addendum.

2. Additional relevant economic justification of requested ATax grant:

- Increased production costs have risen. While we work with sympathetic vendors who give significant discounts, AV, staging venue enhancements and augmented guest experiences costs have continued to rise. We remain committed to a top tier guest experience while keeping ticket prices accessible to encourage broad attendance.
- Expanded marketing strategy as outlined in other areas of the application require time and expertise to research and execute.
- We are actively exploring a second multi day, shoulder season event to encourage overnight stays on the island. We are also exploring overnight literary field trips.
- Enhanced data collection via real-time attendee data collection during events; Expanded post-event surveys; Strengthen reporting metrics related to overnight stays and geographic origin.

Ticket revenue continues to cover the majority of hard event costs.

ATax funds will be used specifically for:

- Event management support
- Tourism-focused expanded marketing strategies
- Guest experience enhancements that increase competitive standing
- Production upgrades that maintain national-caliber programming

Partner Wild Dunes contributes:

- Significant management and logistical support
- Complimentary author accommodations
- Operational staff time

Partner Buxton Books contributes:

- Event planning expertise and management
- Author booking and industry relationships

- programming / author booking and handling
- Marketing and ticketing infrastructure

ATax funds are held in a separate ISLE account and used exclusively for eligible Isle of Palms events in compliance with ATax directives.

3. See addendum.
4. See addendum.
5. Yes
6. None

E. Marketing Plan

I.S.L.E. will specifically emphasize benefits of overnight lodging and dining on the Isle of Palms as well as:

- Confirm and Announce events further in advance to encourage destination planning
- Target drive markets in SC, NC, GA, TN, FL, and VA.
- Promote to fly markets leveraging expanded CHS direct routes
- Position events as:
 - Literary weekends,
 - Book Club travel
 - Multi generational getaways
 - Girls trip cultural tourism
- Utilize:
 - Email marketing
 - Regional and national literary networks.
 - Social media advertising (geo tagging fly markets x specific featured authors)
 - Publisher support outreach for official author tours
 - Partner amplification via Wild Dunes Resort and Buxton Books
 - Seek regional and national coverage in print and online media

F. FUNDING Sources of Income for this project / event

1. Sponsorship and fundraising: unspecified
Sponsorships have traditionally been product donations from loyal supporters of Mary Alice Monroe: Charleston Coffee Roasters, Nothing Bundt Cakes, Firefly

Distillery, Barrier Island Eco Tours, Islander 71, Wild Dunes Resort, Buxton Books (and more!)

2. Entry Fees: Ticketed events only. Tickets cover the hard cost of each event (and when possible include a copy of the author's featured book).
3. Monetary Donations: None collected to date.
4. Accommodations Tax Funds Request: Amount \$40, 000
5. None
6. Total Funding: \$40,000 + ticketing revenue Total Budget: dependent upon ticket revenue

G. Financial Analysis

Line Item Budget: see addendum
(1) Lump Sum(s): \$ 40,000 on July 1, 2026.

H. Miscellaneous

1. Festival: Literary Festival
2. Yes. Mary Alice Monroe initially spoke with Desiree Fragoso for earlier applications.
3. n/a. All events are ticketed to cover the basic hard costs. No other outside funding is sought. Originally, Mary Alice Monroe helped personally fund these events. As the events grew in scope and importance , with the support of the Wild Dunes resort, the ticketed events strive to remain viable through ticket sales and volunteers. Working closely with Isle of Palms businesses creates greater potential for growth opportunities.
4. Yes. Wild Dunes resort has liability insurance for the event.
5. Yes. The literary series has proven to be sustainable and all data indicates that it will continue to grow and flourish.

6. Yes

7. Yes

8. Yes

9. Acknowledgement of the City of Isle of Palms:

As Master of Ceremonies, Mary Alice Monroe proudly acknowledges the City of Isle of Palms and the Accommodations Tax Committee verbally at each hosted event. In addition to verbal acknowledgement, in 2026 I.S.L.E. thanks guests for their attendance by email – highlighting the generous donation of the City that makes the events possible. As these events continue, we will further provide links to the City website and invitational language to stay and explore all the IOP has to offer in all correspondence from the initial offering through the followup thank you letters. We encourage all guests to return to the island for other, non-literary events as well as for upcoming I.S.L.E. events.

ADDENDUM TO ATAX APPLICATION: ISLE WILD DUNES AUTHORS EVENT JULY 2026- JUNE 2027

FALL 2025

The Fall event features adult fiction. Sometimes a cocktail party, sometimes a luncheon. November, 2025 we hosted a cocktail party at the Gallery at Wild Dunes featuring a traditional author talk with Grace Helena Walz (Thomas Nelson).

Winter 2027

Wild Dunes Author Event & Weekend with Mary Alice Monroe

The main flagship event held every Martin Luther King Weekend on Isle of Palms is the foundation of the literary series. Over 21 years, the literary weekend has grown into a three day weekend experience bringing nationally recognized, best-selling authors together with book lovers. There is a varied offering of workshops, a luncheon, cocktail parties with authors, culminating in a sold out Sunday afternoon author panel in the Osprey ballroom. All feature up-close and personal conversations about the works and lives of the featured authors: Kardea Brown, Virginia Evans, Paula McLain, Marie Benedict, Virginia Christopher Murray. Attendance 450..

Proceeds support local literacy organizations (Reading Partners SC 2024-2026)

Attendance was up 38% this year for a sold out event with 450 + attendees at the Sunday event and 197 of whom attended Saturday events as well:

Attendees came from 24 states. Organized by zip code:

- Scottsdale, Arizona 85262
- Los Angeles, California 90024
- Darien, Connecticut 06820
- Key West, Florida 33040
- Palm City, Florida 34990
- Athens, Georgia 30606
- Augusta, Georgia 30909, 30904

- Bostwick, Georgia 30623
- Saint Simons Island, Georgia 31522
- Valdosta, Georgia 31602
- Wilmette, Illinois 60091
- Evanston, Illinois 60201
- Cedar Rapids, Iowa 52404
- Louisville, Kentucky 40242
- Aubumdale, Massachusetts 02466
- Newbury, Massachusetts 01951
- Westborough, Massachusetts 01581
- Cape Neddick, Maine 03902
- Casco, Maine 04015
- Falmouth, Maine 04105
- Wells, Maine 04090
- Bloomfield Hills, Michigan 48304
- Petosky, Michigan 49770
- Detroit Lakes, Minnesota 56501
- Edina, Minnesota 55424, 55410
- Minnetonka, Minnesota 55345
- Saint Louis, Missouri 63122
- Asheville, North Carolina 28804
- Charlotte, North Carolina 28226, 28207, 28270, 28226, 28277, 28203, 28209
- Cherryville, North Carolina 28021

- Chochwinity, North Carolina 27817
- Cornelius, North Carolina 28031
- Gastonia, North Carolina 28056
- Greensboro, North Carolina 27403
- High Point, North Carolina 27262
- Lake Lure, North Carolina 28746
- Lexington, North Carolina 272295
- Matthews, North Carolina 28105
- Mill Spring, North Carolina 28756
- Southport, North Carolina 28461
- Trinity, North Carolina 27370
- Waxhaw, North Carolina 28173
- Wilmington, North Carolina 28411
- Winnabow, North Carolina 28479
- Sunapee, New Hampshire 03782
- Pennington, New Jersey 08534
- Spring Lake, New Jersey 07762
- Upper Montclair, New Jersey 07043
- Garden City, New York 11530
- New York, New York 10013, 10025
- Rochester, New York 14618
- Sauquoit, New York 13456
- Brecksville, Ohio 44141

- Highland Heights, Ohio 44134
- Saint Clairsville, Ohio 43950
- Pittsburgh, Pennsylvania 15216
- Aiken, South Carolina 29803
- Awendaw, South Carolina 29429
- Belton, South Carolina 29627
- Charleston, South Carolina 29401, 29407, 29414, 29492, 29412, 29422, 29403
- Columbia, South Carolina 29204
- Daniel Island, South Carolina 29492
- Florence, South Carolina 29506, 29505
- Folly Beach, South Carolina 29439
- Fort Mill, South Carolina 29715
- Hanahan, South Carolina 29410
- Isle of Palms, South Carolina 29451
- John's Island, South Carolina 29455
- Kiawah Island, South Carolina 29455
- Laurens, South Carolina 29360
- Lexington, South Carolina 29072
- Little River, South Carolina 29566
- Mount Pleasant, South Carolina 29464, 29466
- Murrells Inlet, South Carolina 29576
- Myrtle Beach, South Carolina 29575
- North Augusta, South Carolina 29860

- 31522	- 27370
- 31602	- 27403
	- 27817
Iowa	- 28021
- 52404	- 28031
	- 28056
Illinois	- 28105
- 60091	- 28173
- 60201	- 28203
	- 28207
Kentucky	- 28209
- 40242	- 28226
	- 28270
Maine	- 28277
- 03902	- 28411
- 04015	- 28461
- 04090	- 28479
- 04105	- 28746
	- 28756
Massachusetts	- 28804
- 02466	- 28226
- 01581	
- 01951	New Hampshire
	- 03782
Michigan	
- 48304	New Jersey
- 49770	- 07043
	- 07762
Minnesota	- 08534
- 55345	
- 55410	New York
- 55242	- 10013
- 56501	- 10025
	- 11530
Missouri	- 13456
- 63122	- 14618
North Carolina	Ohio
- 27262	- 43950
- 27295	- 44141

- 44143	- 29485
	- 29486
Pennsylvania	- 29492
- 15216	- 29505
	- 29506
South Carolina	- 29566
- 29072	- 29575
- 29150	- 29576
- 29204	- 29577
- 29301	- 29627
- 29360	- 29672
- 29388	- 29715
- 29401	- 29803
- 29403	- 29860
- 29407	
- 29410	Tennessee
- 29412	- 37919
- 29414	- 37922
- 29418	- 38053
- 29420	- 37604
- 29422	- 37919
- 29429	
- 29439	Texas
- 29451	- 77354
- 29455	
- 29457	Virginia
- 29464	- 22030
- 29466	- 23113
- 29470	Wisconsin
- 29482	- 53186
- 29483	

TOP EIGHT STATES BY ZIP CODE REPRESENTED

1. South Carolina, 39 ZIP Codes
2. North Carolina, 23 ZIP Codes
3. Georgia, 6 ZIP Codes
4. New York & Tennessee, TIED 5 ZIP Codes
5. Maine & Minnesota, TIED 4 ZIP Codes
6. Massachusetts & Ohio, TIED 3 ZIP Codes

TOTAL NUMBER OF ATTENDEES AT THE 21ST ANNUAL WILD DUNES AUTHOR EVENT AND WEEKEND

Sunday, January 18

Sold out room of 450 + attendees.

- General Admission- 294
- VIP and Distinguished Guests- 156

Saturday, January 17

- 11 a.m. Brunch- 77
- 2 p.m. Writing Workshop- 39
- 5 p.m. Pinot and Prose- 81

Friday, January 16

- Kick-off Event 77

Total Number of Survey Respondents:

91 respondents participated in the survey.

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

45% respondents stated that they stayed on the Isle of Palms for the event.

A Tally of Where These Respondents Stayed:

- Wild Dunes Resort Hotel: 11% of the respondents
- Rental Unit Inside Wild Dunes: 8% of the respondents
- Outside of the Gates of Wild Dunes: 9% of the respondents

Number of Attendees Visiting the Event for the First Time:

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

Additional Pertinent Information for the ATAX Committee:

1. Geographic Reach of Attendees:
 - a. The event attracted attendees from North Carolina, South Carolina, Georgia, Tennessee, Florida, Virginia, and Kentucky showing a strong regional presence.
 - b. Local attendees from Mount Pleasant, Awendaw, Daniel Island, Charleston, James Island, John's Island, Kiawah Island, Seabrook Island, Summerville, and Hanahan were also present.
2. Economic Impact on the Isle of Palms:
 - a. With 45% of the respondents staying on the Isle of Palms, the event successfully generated overnight stays, contributing to tax revenue.

July 1, 2026-June 30, 2027
ISLE Budget

Revenue	Amount
General Donations	\$2,000
In-Kind Donations	\$5,000
Grants	\$40,000
Event Income	\$60,000
	\$107,000
Expenses	Amount
Professional Services	\$7,500
Insurance	\$1,000
Marketing & PR	\$22,500
Office Supplies	\$750
Postage & Printing	\$1,000
Program Supplies	\$2,000
Technology & Phone	\$1,500
Travel, Lodging & Mileage	\$5,000
Accounting Fees	\$10,000
Taxes	\$2,000
Event Hard Cost (Books, venue, flood, fees, etc.)	\$53,500
	\$106,750

inventiv

ENVIRONMENTS

PAID 2/10/26

INVOICE # 11201 - Mount Pleasant, SC. Payment for the work performed on the project as per the contract. Payment is due within 30 days from invoice date. Payment should be made to the following:

Client name: [faded]
Client location / address: [faded]
project day, date + timing: [faded]
installation day, date + timing: [faded]
strike day, date + timing: [faded]
project type: [faded]

DESIGN + DECOR	Cost	Qty	Price
2" x 4" wood planter boxes - 100% recycled wood	\$100.00	x 10	\$2,000.00
medium variety plants - colorful blooms in 1/2 gallon pots	\$150.00	x 11	\$1,650.00
single flowers - geraniums - 4 large color mixes in 1/2 gallon pots	\$100.00	x 20	\$2,000.00
variety of ferns - 100% recycled wood planters	\$150.00	x 4	\$600.00
100% recycled wood planters - 100% recycled wood planters	\$100.00	x 10	\$1,000.00
100% recycled wood planters - 100% recycled wood planters	\$100.00	x 10	\$1,000.00
100% recycled wood planters - 100% recycled wood planters	\$100.00	x 10	\$1,000.00
total			\$18,000.00

RECAP OF COSTS	Cost	Amnt	Price
DESIGN + DECOR			\$18,000.00
SALES TAX (9.375%)			\$1,687.50
total			\$19,687.50
preferred client discount** received			-\$13,000.00
deposit received			\$0.00
BALANCE REMAINING:			\$6,687.50

NOTES:
payment via check to: inventiv ENVIRONMENTS 1936 Dovent Circle, Mount Pleasant, SC 29464
Thank you for working with us. We look forward to many more projects!



Wild Dunes Resort

5757 Palm Blvd
Isle of Palms, SC 29451

Phone 843-886-2234

Bill To:

Buxton Books
Attn: Island School Literacy Events (ISLE)

160 King Street

Charleston Sc, 29401

843-723-1670

Date: 1/30/2026

Invoice # 1182026

DESCRIPTION

01/17/25: Program and Sign Printing

Décor & Stands

01/17/25: Gift Baskets

01/17/25: Mary Alice Monroe Brunch

01/17/25: Writing Workshop

#		AMOUNT
S	1.00	\$1,023.51
S	1.00	\$404.56
S	1.00	\$242.80
S	1.00	\$2,316
S	1.00	\$476.25

01/17/25: Prose & Pinot

01/17/25: Authors Dinner at Coastal Provisions

01/19/25: Authors Main Event

01/18/25: Staff Lunch and Drinks

01/18/25: Authors Dinner at Oyster Catcher

Total

THANK YOU FOR YOUR BUSINESS!

\$ 1.00 \$1,793.80

\$ 1.00 \$165.50

\$ 1.00 \$2,668.50

\$ 1.00 \$91.50

\$ 1.00 \$117.00

#ERROR!

\$9,299.42

Buxton Books

PO Box 22604
 Charleston, SC 29413-2604
 +18434422305
 accounting@buxtonbooks.com
 www.buxtonbooks.com



PAID 2/10/26

INVOICE

To:
 Island School Literacy Events
 1000 Palm Blvd
 Isle Of Palms, SC 29451-1605
 USA

Island School Literacy Events
 1000 Palm Blvd
 Isle Of Palms, SC 29451-1605
 USA

01/26/2026

230287
 02/09/2026
 Net 30
 03/11/2026

From:
 Wild Dunes MAM weekend

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL PRICE
98	VIP Tickets plus 4 books included	125.00	12,250.00
			OT
223	GA tickets plus books included	30.00	6,690.00
			T
81	GA tickets plus books ordered	35.00	2,835.00
			T
18	AA tickets plus books included	155.00	2,790.00
			T
77	Brunch tickets w/books	32.00	2,464.00
			T
11	Brunch w/11 comp books	16.00	176.00
39	Workshop w/journal and pen	20.00	780.00
81	Pinot and Prose	5.00	405.00
610	Facilitator fee	5.00	3,050.00
610	Ticket service charge	2.00	1,220.00

Subtotal 32,660.00
 Tax 2,448.45
 Total 35,108.45

Ways to pay

BANK

\$35,108.45

[View and pay](#)



Meredith Buyck <accounting@buxtonbooks.com>

Invoice

MAM Weekend <mam@buxtonbooks.com>

Mon, Feb 9, 2026 at 2:58 PM

To: Polly Buxton <polly@buxtonbooks.com>, Julian Buxton <julian@buxtonbooks.com>, Accounting Buxton Books <accounting@buxtonbooks.com>

Invoice for January 2026

Expenses: \$82.08

Time: \$1,600.00

Amy Gay

#1682.08

Paid

Dashboard (/admin/134318419/dashboard) / Events (/admin/134318419/events) / 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe (/admin/134318419/events/175473709/overview) / Sales Overview

January 17th & January 18th • Wild Dunes Resort

21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe

(/admin/134318419/events/175473709/overview)

Switch Event

Live
 Off Sale

[Event Page \(http\)](#)
[Event Link](#)

Sales Overview

Including sales from all dates. [Filter](#)

Revenue ?

Total	\$47,526.37
Product	\$42,378.00
Fees	\$5,148.37
\$1,222.00 Facility Fee	
\$2,450.15 Service Fee	
\$1,476.22 Processing Fee	
Shipping	\$0.00

Processor: Bold Type Tickets · Stripe

Tickets

Total Units ?	610
Units Sold	610
Units Pulled	?

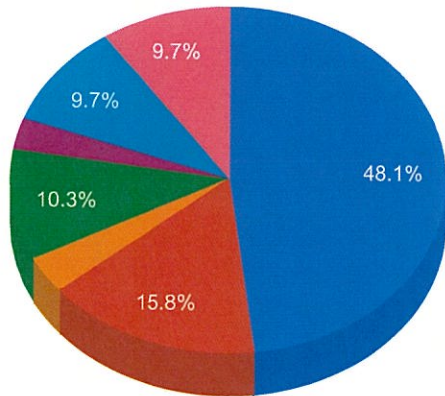


Total Items 	610
Items Sold	610
Items Pulled	0

Orders

Total Orders	376
Units per Transaction	1.62
Items per Transaction	1.62
Average Transaction Value	\$126.40

Tickets Sold by Product



- General Admission- Dark Blue (48.1%)
- VIP Ticket- Red (15.8%)
- 2:00 pm Writing Workshop- Orange (3.4%)
- 5:00 pm Prose and Pinot- Green (10.3%)
- VIP All-Access Ticket - Purple (3%)
- 11 am Books & Brunch - Light Blue (9.7%)
- Friday Kick-off Event - Pink (9.7%)

Product Breakdown

Product	Units	Sold	Pulled	Revenue	% of Rev.
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : General Admission \$52 × 294 · General Admission · \$15,288 \$15,288 Product Total	294	294	0	\$17,457.55	36.7%
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : VIP Ticket \$145 × 96 · VIP Ticket · \$13,920 \$13,920 Product Total	96	96	0	\$15,191.82	32.0%
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : 5:00 pm Prose and Pinot with Paula McLain and Victoria Christopher Murray \$35 × 63 · 5:00 pm Prose and Pinot with Paula McLain and Victoria Christopher Murray · \$2,205 \$2,205 Product Total	63	63	0	\$2,587.45	5.4%
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : Friday Kick-off Event \$12 × 59 · Friday Kick-off Event · \$708 \$708 Product Total	59	59	0	\$995.49	2.1%
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : 11 am Books & Brunch with Kardea Brown and Mary Alice Monroe \$75 × 12 · 11 am Books & Brunch with Kardea Brown and Mary Alice Monroe · \$900 \$75 × 47 · 11 am Books & Brunch with Kardea Brown · \$3,525 \$4,425 Product Total	59	59	0	\$4,943.82	10.4%

Product	Units	Sold	Pulled	Revenue	% of Rev.
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : 2:00 pm Writing Workshop with Paula McLain \$42 x 20 · 2:00 pm Writing Workshop with Paula McLain · \$840 \$42 x 1 · 2:00 pm Writing Workshop with Paula McLain · \$42 \$882 Product Total	21	21	0	\$1,018.28	2.1%
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : VIP All-Access Ticket \$275 x 18 · VIP All-Access Ticket · \$4,950 \$4,950 Product Total	18	18	0	\$5,331.28	11.2%
1/17 11am <i>21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe</i> 21st Annual Wild Dunes Author Event and Weekend with Mary Alice Monroe : Friday Kick-Off Event Day-of \$10 \$8 x 0 · Friday Kick-Off Event Day-of \$10 · \$0 \$0 Product Total	0	0	0	\$0.68	0.0%



BOLD TYPE TICKETS (<http://boldtypetickets.com>)

MANAGE

Events (</admin/134318419/events>)

Venues (</admin/134318419/venues>)

ANALYZE

Sales Overview (</admin/134318419/sales-overview>)

Sales Reports (</admin/134318419/sales-reports/orders>)

BOX OFFICE

Ticket Lookup (</admin/134318419/box-office/ticket-lookup>)

Admissions Data (</admin/134318419/box-office/admissions-data>)

Point of Sale (</admin/134318419/pos>)

HELP

Help Center (<https://help.boldtypetickets.com>)

Contact Support

City of Isle of Palms, SC
 FY27 Budget Planning Model
 Scenario 1
 State Accommodations Tax Fund

	Actual 2024	Actual 2025	Forecast 2026	Projected 2027	Projected 2028	Projected 2029	Projected 2030	Projected 2031	Projected 2032	Projected 2033	Projected 2034	Projected 2035	Projected 2036	NOTES	Actual 2025	Forecast 2026	Increase/Decrease From Actual 2025	Projected 2027	Increase/Decrease From Forecast 2026
Revenues:																			
Recurring Annually	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Structured	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Total - Proposed Operating Expenses	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Debt service (existing):																			
50-4520.5009 Principal	82,439	83,815	83,815	87,048	88,641	90,263	-	-	-	-	-	-	-	DEBT SERVICE - PRINCIPAL	83,815	83,815	-	87,048	3,233
50-4520.5011 Interest	9,476	8,099	8,099	4,867	3,274	1,652	-	-	-	-	-	-	-	DEBT SERVICE - INTEREST	8,099	8,099	-	4,867	(3,232)
Total - Debt service (existing):	91,915	91,914	91,914	91,915	91,915	91,915	-	-	-	-	-	-	-		91,914	91,914	-	91,915	1
Debt service (proposed):																			
Principal repayments	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Interest	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Total - Debt service (proposed):	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Total expenditures	1,738,692	1,703,262	2,421,817	2,352,015	2,144,236	1,897,897	2,315,808	2,045,799	2,016,957	1,910,784	2,332,281	2,026,451	2,624,796		1,703,262	2,421,817	880,659	2,352,015	(69,802)
Actual growth	-2.07%	-2.04%	42.19%	-2.88%	-8.83%	-11.49%	22.02%	-11.66%	-1.41%	-5.26%	22.06%	-13.11%	29.53%		-2.04%	n/a	n/a	38.09%	-2.88%
Revenues over (under) expenditures	1,872,096	2,124,330	1,474,513	1,584,673	1,871,271	2,220,803	1,907,658	2,284,948	2,425,142	2,639,938	2,320,703	2,727,598	2,146,798		2,124,330	1,474,513	(811,921)	1,584,673	110,160
Other Financing Sources (Uses):																			
Sale of Assets	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Lease Liabilities	-	68,968	-	-	-	-	-	-	-	-	-	-	-		68,968	-	(68,968)	-	-
Transfers in																			
Transfers in	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From General Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From Capital Projects Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From Municipal Accommodations Fee Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From Hospitality Tax Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From Beach Preservation Fee Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From Marina Enterprise Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From Victim Assistance Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
From Recreation Building Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Total - Transfers in	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Transfers out																			
Transfers out	-	(1,331,421)	-	-	-	-	-	-	-	-	-	-	-		(1,331,421)	-	1,331,421	-	-
To General Fund	(1,355,544)	(1,060,994)	(1,157,917)	(632,577)	(882,532)	(916,562)	(916,711)	(916,208)	(1,266,568)	(1,566,275)	(1,704,535)	(1,850,219)	(2,300,000)		(1,060,994)	(1,157,917)	(96,923)	(632,577)	525,340
To Capital Projects Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
To Municipal Accommodations Fee Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
To Hospitality Tax Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
To Beach Preservation Fee Fund	-	-	-	(674,708)	-	-	-	-	-	-	-	-	(5,249,664)		-	-	-	(674,708)	(674,708)
To Marina Enterprise Fund	-	(386,300)	(249,864)	(500,006)	(250,051)	(249,999)	(249,850)	(250,353)	(249,993)	(250,286)	(250,465)	(249,781)	-		(386,300)	(249,864)	136,436	(500,006)	(250,142)
To Victim Assistance Fund	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
To Recreation Building Fund	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)	(3,000)		(3,000)	(3,000)	-	(3,000)	-
Total - Transfers out	(1,133,147)	(1,331,421)	(1,410,781)	(1,810,292)	(1,135,583)	(1,169,561)	(1,169,561)	(1,169,561)	(1,519,561)	(1,819,561)	(1,958,000)	(2,103,000)	(7,552,664)		(1,331,421)	(1,410,781)	(79,360)	(1,810,292)	(399,511)
Total other financing sources (uses)	(1,133,147)	(1,262,453)	(1,410,781)	(1,810,292)	(1,135,583)	(1,169,561)	(1,169,561)	(1,169,561)	(1,519,561)	(1,819,561)	(1,958,000)	(2,103,000)	(7,552,664)		(1,262,453)	(1,410,781)	(148,328)	(1,810,292)	(399,511)
Net change in fund balances	738,949	861,877	63,732	(225,618)	735,687	1,051,242	738,098	1,115,387	905,581	820,377	362,703	624,598	(5,405,866)		861,877	63,732	(960,249)	(225,618)	(289,351)
Fund Balances:																			
Nonspendable																			
-placeholder-	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Total - Nonspendable	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Restricted																			
Tourism Related	4,893,009	5,504,887	5,568,620	5,343,001	6,078,688	7,129,931	7,868,028	8,983,415	9,888,997	10,709,374	11,072,077	11,696,675	6,290,808		5,504,887	5,568,620	63,732	5,343,001	(225,618)
Total - Restricted	4,893,010	5,504,887	5,568,620	5,343,001	6,078,688	7,129,931	7,868,028	8,983,415	9,888,997	10,709,374	11,072,077	11,696,675	6,290,808		5,504,887	5,568,620	63,732	5,343,001	(225,618)
Assigned																			
Front Beach Maintenance	-	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000		250,000	250,000	-	250,000	-
Total - Assigned	-	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000		250,000	250,000	-	250,000	-
Unassigned																			
Unassigned fund balance	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Total - Unassigned	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-	-	-	-
Total Fund Balance	4,893,010	5,754,887	5,818,620	5,593,001	6,328,688	7,379,931	8,118,028	9,233,415	10,138,997	10,959,374	11,322,077	11,946,675	6,540,808		5,754,887	5,818,620	63,732	5,593,001	(161,886)
Total Fund Balance - % of Revenues	135.5%	150.4%	149.3%	142.1%	157.61%	179.18%	192.21%	213.21%	228.25%	240.83%	243.33%	251.29%	137.08%		150.4%	149.3%	92.7%	142.1%	0.0%
Unassigned Fund Balance - % of Revenues	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0.0%	0.0%	0.0%	0.0%	0.0%
Unassigned Fund Balance - % of Expenditures	281.4%	337.9%	240.3%	237.8%	295.15%	388.85%	350.55%	451.34%	502.69%	573.55%	485.45%	589.54%	249.19%		337.9%	240.3%	7.2%	237.8%	0.0%
Net Earnings	738,949	861,877	63,732	(225,618)	735,687	1,051,242	738,098	1,115,387	905,581	820,377	362,703	624,598	(5,405,866)		861,877	63,732	(960,249)	(225,618)	(1,087,495)

	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T		
1																				
2	City of Isle of Palms, SC																			
3	FY27 Budget Planning Model																			
4																				
5																				
6	Capital Improvement Plan																			
256	On	Repair sidewalks on Ocean Blvd between 10th and 14th	Police	Cash	State Accommodations Tax Fund			70,000	70000											
257	On	Assign Fund Balance for Future Expenditures	Police	Cash	State Accommodations Tax Fund			25000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000		
338					State Accommodations Tax Fund			365,681	216,024	998,667	660,000	507,000	619,500	678,000	391,500	346,000	223,000	627,500	304,500	885,500