

# ACCOMMODATIONS TAX APPLICATION

FISCAL YEAR 2023



CITY OF BEAUFORT

## TOURISM DEVELOPMENT ADVISORY COMMITTEE

This Grant Application is for funding from the Beaufort Accommodations Tax Fund (BATF). It will be reviewed by the City of Beaufort Tourism Development Advisory Committee (TDAC), who will make funding recommendations to the Beaufort City Council. Beaufort City Council makes all final BATF grant determinations for the City of Beaufort.

**Mandatory Learn and Share Workshops:** The City of Beaufort will hold a mandatory workshop for applicants on Tuesday, August 2nd at 10:00 AM and Thursday, August 11th at 2:00 PM. **All potential applicants are required to attend one of these workshops.** The workshops will be held at Beaufort City Hall. Potential applicants may also attend the workshops by Zoom video conference. The purpose of the workshops is to assist potential applicants with completing the application, review the new scoring method and identifying other organizations for collaboration opportunities for Accommodations Tax funds.

**It is mandatory for all applicants to attend one of these sessions.**

### Zoom links to Learn and Share Workshops

#### Topic: City of Beaufort ATAX Workshop 1

Time: Aug 2, 2022 10:00 AM

In-Person location, Beaufort City Hall, located at 1911 Boundary Street 2<sup>nd</sup> Floor, Council Chambers

Join Zoom Meeting

<https://us02web.zoom.us/j/83614988741?pwd=eVAwNEsxMk5jWGVza2c5d2tzYnU2QT09>

Meeting ID: 836 1498 8741

Passcode: 102565

**Topic: City of Beaufort ATAX Workshop 2**

Topic: ATAX FY2023 Workshop 2

Time: Aug 11, 2022 02:00 PM Eastern Time (US and Canada)

<https://us02web.zoom.us/j/83061954924?pwd=dllxTk12SzYyeU1wdTBvd0RMZnpUZz09>

Meeting ID: 830 6195 4924

Passcode: 914224

**All applications must be fully completed and received by:**  
**5:00 PM, August 26, 2022**

Completed applications can be delivered to:

City of Beaufort, Finance Department, 1911 Boundary Street, Beaufort, SC 29902.

Completed applications may also be sent by email to the following address: [jphillips@cityofbeaufort.org](mailto:jphillips@cityofbeaufort.org). Submit one (1) portable document format (pdf) file as an email attachment. After sending the completed application by email, applicants must send a separate email without an attachment to advise that an application has been submitted. Applicants will receive a reply to confirm receipt or additional instructions to complete the submission. A file sharing platform (i.e., Dropbox) may need to be used due email file size limitations. For more information contact Jay Phillips, ATAX Administrator, (843) 525-7071.

## ACCOMMODATIONS TAX FUNDS APPLICATION INSTRUCTIONS

### Policies and Procedures

1. All areas of the application must be completed. Incomplete applications will be deemed unresponsive and will not be considered for funding.
2. If your organizations received funding last year, a copy of the financial statement for this project **must** accompany your application.
3. Funding generally is of the reimbursement method; with appropriate back-up (i.e., signed contract(s), paid invoices, canceled checks, etc.).
4. All funding should be matched on at least a 50/50 basis ***with the exception of the City's Designated Tourism Marketing Organization for use in marketing, advertising, and promotion only***. Matching funds may not come from other accommodation tax sources.
5. Applications may be submitted in hard copy format or by email as an attachment in Portable Document Format (PDF).
6. Accommodation tax funds are for use by non-profit organizations, 501C3 and 501C6.
7. Accommodation tax funds may **NOT** be spent purely on local functions.
8. Accommodation tax funds are public funds and as such recipients of such funds must follow all applicable procurement policies and procedures of the City.
9. All organizations receiving Accommodation Tax funding are subject to an audit.
10. A reimbursement request form must be submitted upon completion of the project. Recipients must provide a final accounting for the project, copies of all invoices and canceled checks showing payment, and a completed final evaluation report that includes:
  - a. Percentage of Tourism generated by the event or project;
  - b. Total attendance to the event or project;
  - c. Overall budget of the event or project;
  - d. Description of how the event or project attracts and promotes tourist to the area.
11. **Any profit derived from your program/event may be deducted from your final grant reimbursement check pending the review of the reimbursement request or pending an audit.**

12. Expectation is that organizations would work toward financial autonomy or other funding sources.

### **Guidelines for Tourism**

1. "Tourism-related expenditures" include:
  - a. advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity;
  - b. promotion of the arts and cultural events;
  - c. construction, maintenance, and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities;
  - d. the criminal justice system, law enforcement, fire protection, solid waste collection, and health facilities when required to serve tourists and tourist facilities. This is based on the estimated percentage of costs directly attributed to tourists;
  - e. public facilities such as restrooms, dressing rooms, parks, and parking lots;
  - f. tourist shuttle transportation;
  - g. control and repair of waterfront erosion, including beach re-nourishment;
  - h. operating visitor information centers.
2. "Travel" and "Tourism" mean the action and activities of people taking trips outside their home communities for any purpose, except daily commuting to and from work. "Tourist" is generally defined as those who travel at least 50 miles to attend an event.
3. Applicants must be able to substantiate how much of the total expenditure is related to tourism, and must be able to provide the "percentage of tourism" to the total budget of the project.
4. That the expenditure must be used for marketing and other qualified expenses directed toward increasing hotel/motel room nights (overnight visitors) and toward bringing people to Beaufort from outside the metropolitan area.
5. Individual organizations with a similar focus, constituency, or concern should work together within the framework of the designations below that are a part of the makeup of the Beaufort community. ATAX funding will be awarded to groups showing a willingness to coordinate their marketing efforts in conjunction with The City's DMO (Designated Marketing Organization). These 'sub-brands' are:
  - a. History & Culture – can include the history and culture of Beaufort; the Beaufort Historic District; history of the Gullah people and culture on the Sea Islands; the Gullah/Geechy Corridor; military history of the Beaufort Area; etc.
  - b. Events & Festivals – includes events and festivals of one day or longer that bring individuals from outside the Beaufort area.
  - c. The Arts – events and activities to support, promote, and highlight the arts in Beaufort. Includes visual, performing, and literary arts, etc.
  - d. Outdoor Recreation – includes watersports, golf, local recreational areas, etc.The expenditure may not be used for an item that would normally be provided by the county or municipality.
6. Allowable expenses include:
  - a. Development of new events or major exhibits and activities.
  - b. Promotional activities that compliment advertising, including materials that create awareness and build or maintain a good image of Beaufort.

- c. The purchase of recognized media advertising focusing on attracting visitors to Beaufort (print, broadcast, outdoor, digital).
  - d. Advertising buys must include markets more than 50 miles from Beaufort or with broadcast radii of 50+ miles. Local media outlets do not normally meet the intended purpose of the grant and will receive less consideration than media outlets located 50+ miles outside of Beaufort.
  - e. No more than 30% of grant funds may be used for postage.
7. **To maximize the awarded dollars and for the best use of marketing funds all applicants who receive grants for “Marketing and Promotion” for ad buys should be coordinated with the DMO and should fit within the DMO’s current advertising plan. It is critical to note, the DMO is not using its awarded Accommodations Tax Grant or “Advertising and Promotional Fund” to execute ad placements for Accommodations Tax Grant applicants.**
8. Organizations applying for funding must list any other Accommodations Tax funding they have requested or received from other municipalities or counties for the same funding year.
9. Grant recipients are required to include certain materials of the City of Beaufort’s Designated Marketing Organization in all of their marketing material:
- a. Organizations receiving a TDAC A-Tax Grant must have a reciprocal link on their Web site to the designated DMO. The consumer must be able to reach the DMO website in one click.
  - b. Inclusion of the DMO logo on printed pieces and any call-to-action.
  - c. The DMO must be listed as a sponsor in the event program and must be included in any call-to-action.
  - d. The addition of the DMO logo in banner ads with call-to-action.
10. Organizations out of compliance with deadlines and required procedures will result in possible penalties.
- a. Failure to use funds as specified in the contract may result in penalties up to and including a full refund of grant funds.
  - b. Failure to follow the agreed upon procedures and submission of final the report by the deadline is unacceptable and may result in penalties up to and including a full refund of grant funds.
  - c. Applicants who do not comply with all deadlines and procedures may be disqualified as eligible to receive TDAC A-Tax Grant Funds for two years.
11. Applicants that are holding events during the off-season (3<sup>rd</sup> week of July to the end of Sept. and 3<sup>rd</sup> week of Nov. to 1<sup>st</sup> week of March) will be reviewed more favorably.

**Grant Review Criteria – Applications are evaluated and scored based on the following areas:**

1. **Impact on Tourism**
  - a. **What is the anticipated attendance (number) or number of people who will benefit from this project/event?**
  - b. **How many of the above are anticipated to be tourists (as defined by the guidelines)?**
  - c. **Describe how the impact on tourism will be evaluated and measured? Describe how tourist participation will be measured or documented?**
  - d. **If requesting marketing or promotional funding, describe in detail the marketing/promotional plan and how it will effectively reach tourists and attract them to the City of Beaufort. Explain why marketing or promotional concepts to be funded are the best or most effective, and how this determination was made.**
2. **Coordination and collaboration to leverage impact**

- a. How will the applicant coordinate the proposed project or event with other organizations, activities, or events to leverage impact?
  - b. What commitments are in place from others related to coordination and collaboration with the proposed project?
  - c. Describe how your marketing plan and event fits into one of the DMO's 'sub-brands for tourism' (Arts, Events & Festivals, History & Culture, Outdoor Recreation).
3. Fiscal stability and Administrative Ability
- a. Description of the applicant's organizational structure, operating budget, and history with similar projects or events.
  - b. What are the organization's goals? How does this project or event fit with the organization's mission?
  - c. Explain how project or event expenses will be covered until reimbursement is received.
4. Budget
- a. As part of the application each Applicant must submit their event or project budget on the provided budget document. The score will be a result of the review and understanding of the budget.
5. Prior History and success with City of Beaufort ATAX grants
- Prior ATAX grants received from the City of Beaufort in the past 5 years. Identify the project and amount awarded.
- a. Describe the success and/or obstacles in carrying out the project, what was learned.
- b. What was the impact on tourism, including number of tourists involved and how they were documented?

# CITY OF BEAUFORT ACCOMMODATIONS TAX GRANT APPLICATION

**A separate application is required for each event or project for which funding is requested.**

1. Name of Applicant: \_\_\_\_\_

2. Mailing Address: \_\_\_\_\_  
Street Address or P.O. Box      City      State      Zip

3. Project Director: \_\_\_\_\_

Project Treasurer or Administrative Official: \_\_\_\_\_

Telephone #: \_\_\_\_\_ Fax #: \_\_\_\_\_ Email: \_\_\_\_\_

4. Event or Project Name: \_\_\_\_\_

List below any Accommodations Tax funding that you have previously been awarded from the City of Beaufort for this specific event or project.

\_\_\_\_\_

List Accommodations Tax funding that you have received in the previous years for other events or projects.

\_\_\_\_\_

List any Accommodations Tax funds you have requested or received from other municipalities or counties for this proposed event or project.

\_\_\_\_\_

5. Date you will begin and complete work on your event or project: \_\_\_\_\_

Begin – Month/Year \_\_\_\_\_ End – Month/Year \_\_\_\_\_

***Note: Event or project must be completed within 12 months from date of award.***

6. Applicant Category (check all that apply)

Non-profit organization registered with the Secretary of South Carolina

Eleemosynary organization established under IRS Code 501 (c) 3,4,5,6,7,10

Other Non-profit organization

Government or governmental agency

For-profit organization

7. Federal Employee Identification number (EIN): \_\_\_\_\_

8. Total Estimated Costs of the Proposed Event or Project: \$ \_\_\_\_\_

Accommodation Tax Funds Requested: \$ \_\_\_\_\_

Project Funding from Other Sources: \$ \_\_\_\_\_

9. Source of Applicant's Other Funds: \_\_\_\_\_

10. What is the anticipated total attendance for your event? \_\_\_\_\_

Total "tourist" anticipated? \_\_\_\_\_

11. All applicants must show a collaborative effort in coordinating their marketing. Please list what organization you will be working with and explain collaboration:

\_\_\_\_\_

**12. Provide the information below as an attachment to your application:**

A. A detailed Budget showing projected revenues and expenditures for the entire event or project proposed (**complete attached budget template**).

B. A defined budget for the particular costs of the event or project for which you are seeking accommodations tax funding. **The Tourism Development Advisory Committee must know specifically how you intend to spend your award.**

C. A brief summary description of the proposed event or project. This description will be used in executive summaries and for annual reporting purposes where space is limited. Accordingly, this description must be limited to no more than 100 words.

D. Describe how the proposed event or project relates to the organization's purposes and identify who is expected to benefit.

E. Describe the expected impact on tourism and the tourism industry in the area served. Certain tourism-related expenditures must be awarded on a "percentage of tourism" basis. Applicant must be able to substantiate how much of the total expenditure is related to tourism.

F. Describe how the effectiveness of the event or project in attracting or providing for tourist will be evaluated?

SIGNING THIS DOCUMENT CONSTITUTES A STATEMENT OF INTENT TO COMPLY WITH ALL ACCOMMODATION TAX GRANT GUIDELINES, INCLUDING THE REQUIREMENT TO FOLLOW THE CITY OF BEAUFORT'S PROCUREMENT POLICIES AND PROCEDURES AS OUTLINED IN THE PACKET INSTRUCTIONS.

**I CERTIFY THE INFORMATION PROVIDED IN THIS APPLICATION IS TRUE, CORRECT AND COMPLETE.**

**Event or Project Director:** \_\_\_\_\_

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



Organization Name: \_\_\_\_\_ Project Name: \_\_\_\_\_

Event/Project Revenue Projected \_\_\_\_\_  
Admissions Receipts \_\_\_\_\_  
Private Donations \_\_\_\_\_  
City of Beaufort ATAX Requests \_\_\_\_\_  
Port Royal ATAX Requests \_\_\_\_\_  
Hilton Head ATAX Requests \_\_\_\_\_  
Bluffton ATAX Requests \_\_\_\_\_  
Beaufort County ATAX Requests \_\_\_\_\_  
Other Area ATAX Requests \_\_\_\_\_  
**Total Revenues** \_\_\_\_\_

**Expenses:**

Sales Promotions Expenses \_\_\_\_\_  
Publicity Materials Expense \_\_\_\_\_  
Newspaper Advertising \_\_\_\_\_  
Radio Advertising \_\_\_\_\_  
Magazine Advertising \_\_\_\_\_  
Television Advertising \_\_\_\_\_  
Billboard Advertising \_\_\_\_\_  
Printing \_\_\_\_\_  
Direct Mail Expenses \_\_\_\_\_  
Brochure Printing \_\_\_\_\_  
Flyer Printing \_\_\_\_\_  
Other Promotional Items \_\_\_\_\_  
Postage Supplies \_\_\_\_\_  
Equipment Rental \_\_\_\_\_  
Service Rental \_\_\_\_\_  
Entertainment Fees \_\_\_\_\_  
Speaker Fees \_\_\_\_\_  
Hospitality Fees \_\_\_\_\_  
Decorations \_\_\_\_\_  
Refreshments \_\_\_\_\_

Other Expenses (detail below)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Total Expenses** \_\_\_\_\_

**Event Profit (Loss) Total Request for ATAX Grant** \_\_\_\_\_

Return to: **CITY OF BEAUFORT**  
**Attn: Finance Department**  
**C/O TDAC**  
**1911 Boundary Street**  
**Beaufort, SC 29902**

Any questions, please contact Jay Phillips at 843-525-7071 or [jphillips@cityofbeaufort.org](mailto:jphillips@cityofbeaufort.org).

**Only submit pages 7-10 including the event budget as part of this packet. Pages 1-6 are for the applicant's records.**

I \_\_\_\_\_ have read the ACCOMMODATION TAX FUNDS APPLICATION INSTRUCTIONS and fully understand the "Policies and Procedures", "Guidelines for Tourism" and "Grant Review Criteria" as noted on pages 3-6 of the application. I acknowledge that a misrepresentation of the required information or failure to provide required information will remove me from consideration of the 2022-2023 Accommodations Tax Funds.

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date