Town of Hilton Head Island

Finance and Administrative Committee Meeting

Tuesday, February 25, 2025, 10:00 AM
1 Town Center Court, Hilton Head Island, SC
Benjamin M. Racusin Council Chambers

The meeting can be viewed on the Town's YouTube Channel, the Beaufort County Channel, and Spectrum Channel 1304.

1. **Call to Order**
2. **Adoption of the Agenda**
3. **Approval of the Minutes**
   a. Regular Meeting Minutes of October 29, 2024
4. **Presentation**
   a. Town of Hilton Head Island FY2025 Monthly Financial Update - Adriana Burnett, Finance Director
   b. Review and Discussion of the Town of Hilton Head Island's Affiliated Agency Funding Request Applications for Fiscal Year 2026 - Adriana Burnett, Finance Director
5. **Public Comment - Non Agenda Items**
6. **Adjournment**

Municipal Association of South Carolina (MASC) Civility Pledge:
"I pledge to build a stronger and more prosperous community by advocating for civil engagement, respecting others and their viewpoints, and finding solutions for the betterment of my city or town."

Town of Hilton Head Island
FINANCE AND ADMINISTRATIVE COMMITTEE MEETING
Tuesday, October 29, 2024, 10:00 AM
Minutes

Call to Order

Chairman Brown called the meeting to order at 10:00 a.m.

Committee Members Present: Alex Brown, Chair; Ward 1; David Ames, Ward 3; Steve Alfred Ward 5; and Glenn Stanford, Ward 6

Adoption of the Agenda

Mr. Ames moved to adopt the agenda. Mr. Alfred seconded. Motion carried 4-0.

Approval of the Minutes

Regular Meeting Minutes of September 24, 2024

Mr. Ames moved to approve. Mr. Stanford seconded. Motion carried 4-0.

New Business

Monthly Financial Report and Presentation - Adriana Burnett, Finance Director

Adriana Burnett, Finance Director, provided the Committee with a high-level summary of the Town's financial performance for the first quarter of the 2025 fiscal year.

The Town's total net position decreased by $15,826,231 from the start of the fiscal year. This decline is primarily attributed to operating expenses in the General Fund amounting to $12,371,144, CIP Fund expenses totaling $9,821,466, and Debt Service Fund expenditures of $4,371,513. All of these expenditures were anticipated. The General Fund covers the Town's operating expenses, while CIP expenditures include both actual costs incurred for approved projects and encumbered expenses under vendor contracts for designated work. Additionally, the Debt Service expenditure reflects payments on the Town's long-term debt, covering both principal and interest.

Revenues received during the first quarter account for only 9% of the total projected for the fiscal year, which explains why current expenditures exceed revenues. This trend is expected to reverse in the third and fourth quarters. Overall, the Town's consolidated financials show a balance that is $2,453,407 higher than the total balance at the end of the 2023 fiscal year. Consolidated fund balances for FY25 Q1 are 10% higher compared to FY24 Q1 fund balances.

The Fiscal Year 2025 Consolidated Financials year-to-date fund balances for Quarter 1 core funds expenses were higher than revenues. The first quarter revenues have not all been collected as of yet, however, Mrs. Burnett stated that this was a good start and by the second quarter the Committee would be able to see the change with reporting in the second quarter. Mr. Stanford felt that if this was a normal for-profit business it could be concerning to see this report if one is not aware of how the Town operates. This budgetary information follows a normal pattern as first quarter revenues traditionally are lower in the first quarter than in subsequent quarters.

Fiscal Year 2025 Budget Analysis - Quarter 1

General Fund:

a. Top uses of funds included $2.8M in personnel expenses and $1.1M in operating expenses.
b. Top sources of funds included $241K in local ATAX and $310K in interest earned.

Debt Service Fund:

a. No significant expenses in September.
b. Tops sources of funds included $71K in Interest earned and $30K in Property Tax.

CIP Fund

a. Top uses of funds included $1.3M for new Fire Trucks and $1.8M in land acquisition.
b. Tops sources of funds included $47K in interest earned.

Stormwater Utility Fund

a. Top uses of funds included $159K for Personnel & Operating expenses and $77K in Stormwater Maintenance.
b. Top sources of funds included $31K in interest and $23K in Stormwater Fees.

GGHNCDC Fund:

a. Top uses of funds included $15K for Personnel & Operating expenses.
b. Top sources of funds included $36K in Interest.

Housing Fund:

a. Top uses of funds included $15K for Workforce Housing consulting and events.

FY 2025 CIP Budget Balances - Quarter 1

Mrs. Burnette provided an overview of the Town's Capital Improvement Program (CIP) budget balances to the Committee, detailing year-to-date expenditures and encumbrances. Her review highlighted the remaining fiscal year 2025 budget of $53 million, which is allocated to support the completion of planned projects.

The Committee expressed their appreciation for the information presented. They suggested that, moving forward, Mrs. Burnette include details on cost savings in her reports to Town Council, similar to the way spending updates are provided. Additional discussion centered on the funding process for the Town's First Trucks prior to funds being available, the accuracy of project projections and evaluations, and the potential to enhance the Town's Small and Minority Business Program.

Public Comment - Non Agenda Items

There was no public comment at this time.

Adjournment

Chairman Brown adjourned the meeting at 10:44 a.m.

The recording of this Meeting can be found on the Town's website at www.hiltonheadislandsc.gov

FY 2025 FINANCIAL UPDATE

February 25, 2025

FINANCIAL UPDATE

FY 25 – YTD 1/31/25

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EXECUTIVE SUMMARY

FINANCIAL UPDATE – YEAR TO DATE – JANUARY 31, 2025

This financial update provides a high-level summary of the Town's financial performance as of January 31, 2025. The Town has had an exceptional year to date, as reflected in a 10% increase in fund balances compared to the previous year. Major fund revenues for FY25 have risen by 14% over the same period in FY24, while expenditures have increased by only 4% before accounting for transfers or other funding sources. This demonstrates the Town's operational efficiencies and strong cash flow management.

Key financial highlights include:

•General Fund revenue has increased by 26% year-over-year.
•Debt Service Fund revenue has grown by 78%.
•Stormwater revenue continues to show positive performance.
•CIP Fund expenses total $10.2 million (excluding new land acquisitions), with $14.9 million in encumbrances, leaving a remaining CIP balance of $54.5 million.

The General Fund supports the Town's operating expenses, while CIP expenditures include both actual costs incurred for approved projects and encumbered expenses under vendor contracts for designated work.

FY 2025 CONSOLIDATED FINANCIALS YTD FUND BALANCES – 1/31/25

CONSOLIDATED FUND BALANCES

FISCAL YEAR 2025
YTD (1/31/25)

CORE FUNDS	FY22	FY23	FY24	FY25 BEGINNING BALANCE	YTD REVENUES	YTD EXPENDITURES	YTD FUND ENDING BALANCE 1/31/25	YTD FUND ENDING BALANCE 1/31/24	% INC/DEC
GENERAL FUND	$ 29,062,865	$ 33,502,808	$ 39,536,669	$ 39,536,669	$ 23,072,333	$ 31,963,393	$ 30,645,610	$ 25,221,330	22%
DEBT SERVICE FUND	$ 11,239,657	$ 12,159,356	$ 13,716,563	$ 13,716,563	$ 4,664,206	$ 6,171,921	$ 12,208,848	$ 12,704,712	-4%
CIP FUND	$ 8,796,482	$ 3,402,646	$ 7,675,346	$ 7,675,346	$ 722,399	$ 19,090,935	$ (10,693,190)	$ 9,996,144	-207%
STORMWATER UTILITY FUND	$ 10,540,740	$ 13,178,610	$ 13,754,708	$ 13,754,708	$ 2,210,337	$ 2,098,974	$ 13,866,070	$ 11,998,207	16%
GGHNCDC FUND	$ -	$ 5,415,560	$ 5,561,896	$ 5,561,896	$ 167,583	$ 151,308	$ 5,578,171	$ 5,543,765	1%
HOUSING FUND	$ -	$ -	$ 2,148,477	$ 2,148,477	$ -	$ 119,256	$ 2,029,221	$ 1,971,166	3%
SUBTOTAL	$ 59,639,744	$ 67,658,980	$ 82,393,659	$ 82,393,659	$ 30,836,857	$ 59,595,787	$ 53,634,729	$ 67,435,324	-20%
OTHER FINANCING SOURCES	$ 129,980,212	$ 143,762,604	$ 147,377,808	$ 147,377,808	$ 32,608,086	$ 8,455,691	171,530,203	140,835,168	
TRANSFERS IN/OUT					$ 38,401,963	$ 35,293,541	$ 3,108,421		
TOTAL	$ 189,619,956	$ 211,421,584	$ 229,771,467	$ 229,771,467	$ 101,846,906	$ 103,345,020	$ 228,273,354	$ 208,270,492	10%

FY 2025 YEAR OVER YEAR REVENUES / EXPENDITURES ANALYSIS – YTD 1/31/25

Year over Year Comparison

CORE FUNDS	YTD REVENUES 1/31/25	YTD REVENUES 1/31/24	% Change	YTD EXPENDITURES 1/31/25	YTD EXPENDITURES 1/31/24	% Change
GENERAL FUND	$ 23,072,333	$ 18,321,007	26%	$ 31,963,393	$ 30,471,400	5%
DEBT SERVICE FUND	$ 4,664,206	$ 2,623,132	78%	$ 6,171,921	$ 7,353,697	-16%
CIP FUND	$ 722,399	$ 3,868,643	-81%	$ 19,090,935	$ 17,263,293	11%
STORMWATER UTILITY FUND	$ 2,210,337	$ 1,951,614	13%	$ 2,098,974	$ 2,199,101	-5%
GGHNCDC FUND	$ 167,583	$ 169,654	-1%	$ 151,308	$ 41,449	265%
HOUSING FUND	$ -	$ -		$ 119,256	$ 28,834	314%
SUBTOTAL	$ 30,836,857	$ 26,934,051	14%	$ 59,595,787	$ 57,357,774	4%
OTHER FINANCING SOURCES	$ 32,608,086	$ 33,213,847	-2%	$ 8,455,691	$ 7,955,898	6%
TRANSFERS IN/OUT	$ 38,401,963	$ 34,132,985	13%	$ 35,293,541	$ 32,118,301	10%
TOTAL	$ 101,846,906	$ 94,280,882	8%	$ 103,345,020	$ 97,431,973	6%

FY 2025 BUDGET ANALYSIS – YTD 1/31/25

	FY25 BUDGET APPROVED	YTD NET ACTIVITY	REMAINING BALANCE
GENERAL FUND	$ 62,546,927	$ 8,891,059	$ 53,655,868
DEBT SERVICE FUND	$ 16,700,000	$ 1,507,715	$ 15,192,285
CIP FUND	$ 82,802,799	$ 18,368,536	$ 64,434,263
STORMWATER UTILITY FUND	$ 9,082,691	$ (111,362)	$ 9,194,053
GGHNCDC FUND	$ 3,405,501	$ (16,275)	$ 3,421,776
HOUSING FUND	$ 4,000,000	$ 119,256	$ 3,880,744
CONSOLIDATED BUDGET	$ 178,537,918	$ 28,758,930	$ 149,778,988

January Notes:

General Fund:
a. Top uses of funds included $3.0M in personnel expenses and $1.4M in operating expenses.
b. Tops sources of funds included $9.8M in Property Tax, $570K in Local ATAX and $266K in Business License Fees

Debt Service Fund:
a. Top uses of funds included $274K in interest
b. Tops sources of funds included $46K in Interest and $3.4M in Property Tax

CIP Fund:
a. Top uses of funds included $531K on Park Improvements, $312K on Fire Station Improvements, $238K on Honey Horn Improvements
b. Tops sources of funds included $23K in Beaufort County Impact Fees and $43k in Interest

Stormwater Utility Fund:
a. Top uses of funds included $176K for Personnel, Operating & Debt Service expenses and $177K in Stormwater Maintenance
b. Tops sources of funds included $27K in Stormwater Permit Fees and $1.2M in Property Tax

GGHNCDC Fund:
a. Top uses of funds included $16K for Personnel expenses
b. Tops sources of funds included $20K in Interest

Housing Fund:
a. Top uses of funds included $32K for Workforce Housing consulting and events

TOWN OF HILTON HEAD ISLAND

FY 2025 APPROVED CIP BUDGET BALANCES – YTD 1/31/25

Summary	FY 2025 Approved Budget	YTD Expenditures	YTD Encumbrances	FY 2025 Remaining Budget
Beach Program	$ 21,599,000	$ 258,527	$ 745,094	$ 20,595,379
Pathway Program	$ 5,500,000	$ 346,206	$ 244,212	$ 4,909,582
Roadway Program	$ 10,317,218	$ 1,041,310	$ 1,241,894	$ 8,034,014
Park Program	$ 19,815,273	$ 1,477,258	$ 7,752,488	$ 10,585,526
Facility & Equipment Program	$ 8,402,291	$ 2,111,324	$ 1,128,109	$ 5,162,858
Stormwater Program	$ 2,193,310	$ 278,712	$ 1,352,600	$ 561,998
Fleet Program	$ 11,750,707	$ 4,693,181	$ 2,429,533	$ 4,627,993
Subtotal	$ 79,577,799	$ 10,206,518	$ 14,893,930	$ 54,477,351
Land Acquisition & Administration	$ 3,225,000	$ 8,884,417	$ 23,299	$ (5,682,716)
Total	**$ 82,802,799**	**$ 19,090,935**	**$ 14,917,229**	**$ 48,794,635**

QUESTIONS:

ADRIANA BURNETT
FINANCE DIRECTOR

EMAIL: ADRIANAB@HILTONHEADISLANDSC.GOV

TOWN OF HILTON HEAD ISLAND

Finance & Administrative Committee

TO:	Finance & Administrative Committee
FROM:	Adriana Burnett, Finance Director
CC:	Marc Orlando, ICMA-CM, *Town Manager*
DATE:	February 25, 2025
SUBJECT:	Town of Hilton Head Island's Affiliated Agency Funding Request Applications for FY2026

Town staff is bringing to the attention of the Finance & Administrative Committee all Affiliated Agency applications for FY2026. The application process began on January 14, 2025, and concluded on February 14, 2025.

A total of 11 applications were received, requesting a combined $3,241,567 in funding.

Next Steps:

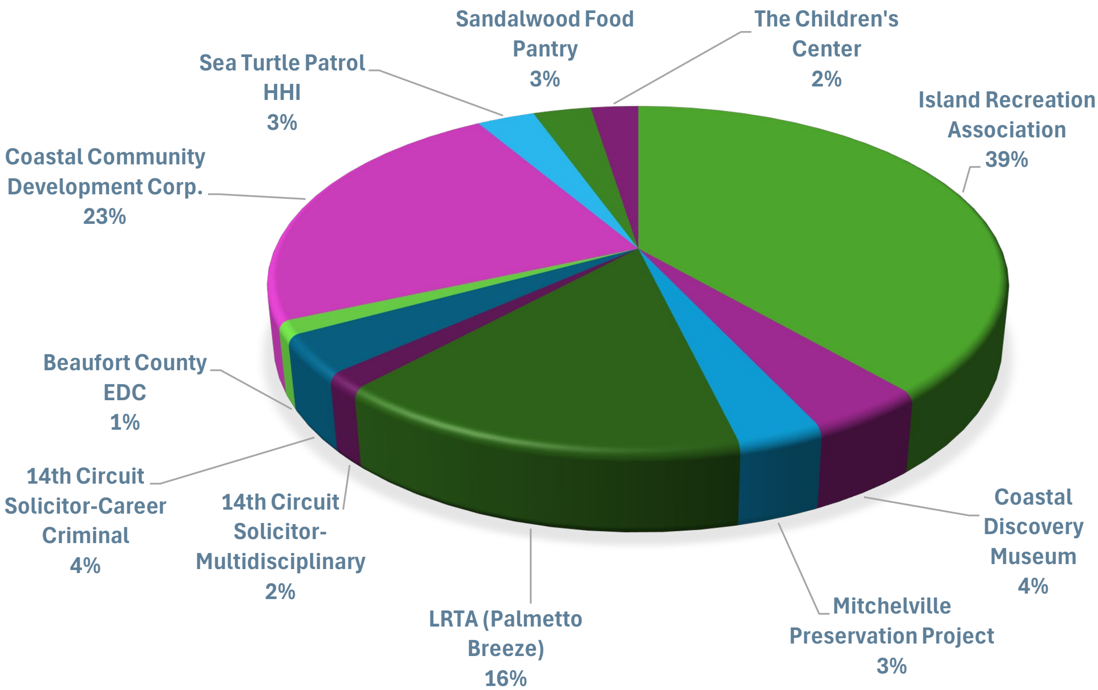
Town staff will present a detailed review of all 11 applications during the Finance & Administrative Committee meeting on March 18, 2025, for the Committee's consideration and approval.

Attachments:

1. Town of Hilton Head Island: FY2026 Affiliated Agencies Funding Requests Summary
2. Affiliated Agency Applications: 11 completed applications
3. Reference Document: Blank Affiliated Agency Application

TOWN OF HILTON HEAD ISLAND: FY2026 GENERAL FUND BUDGET - DRAFT

General Fund - Affiliated Agencies Funding Requests



	FY 2022 Actual	FY 2023 Actual	FY2024 Revised Budget	FY2024 Actual	FY 2025 Revised Budget	FY 2026 Requests
Island Recreation Association	$ 1,087,578	$ 1,099,304	$ 1,123,766	$ 1,123,766	$ 1,167,366	**$ 1,252,366**
Coastal Discovery Museum	75,000	92,775	102,432	102,432	107,700	**141,650**
Mitchelville Preservation Project	105,000	105,000	105,000	105,000	105,000	**105,000**
USCB Event Management/Ambassadors	186,367	173,447	238,985	238,985	235,000	**-**
LRTA (Palmetto Breeze)	225,165	282,404	277,842	277,842	253,595	**507,051**
14th Circuit Solicitor-Multidisciplinary	50,000	50,000	50,000	50,000	50,000	**50,000**
14th Circuit Solicitor-Career Criminal	118,500	118,500	118,500	118,500	118,500	**118,500**
Beaufort County EDC	25,000	25,000	40,000	40,000	40,000	**42,000**
Habitat for Humanity	-	-	500,000	-	500,000	**-**
Coastal Community Development Corp.	-	-	600,000	-	600,000	**750,000**
Sea Turtle Patrol HHI	-	-	-	-	73,480	**97,500**
Sandalwood Food Pantry	-	-	-	-	-	**97,500**
The Children's Center	-	-	-	-	-	**80,000**
Total	**$ 1,872,610**	**$ 1,946,430**	**$ 3,156,525**	**$ 2,056,525**	**$ 3,250,641**	**$ 3,241,567**

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: 14th Circuit Solicitors Office

Project Name: Career Criminal Unit and Multidisciplinary Court programs

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/10/2025	Time Received: 11:37 AM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. **SUMMARY OF GRANT REQUEST:**

ORGANIZATION NAME: 14th Circuit Solicitors Office

Project/Event Name: Career Criminal Unit and Multidisciplinary Court programs

Contact Name: Jeff Kidd	Title: Administrative Chief of Staff
Address: 108 Traders Cross, Suite 103, Bluffton, SC 29909	
Email Address: jkidd@scsolicitor14.org	Contact Phone: 843-790-6439
Total Budget: $1,362,177.00	**Grant Amount Requested:** $168,500.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

We seek continuation of $168,500 in funding to support our Career Criminal Unit and our Multidisciplinary Court. The former has a 15-year track record of reducing crime by targeting the most violent and habitual offenders for priority prosecution. The latter rehabilitates those on the opposite end of the spectrum – nonviolent offenders whose crimes are motivated by PTSD (former military service members) or alcohol/drug addiction. Through counseling, close supervision and regular drug testing, these offenders become productive, law-abiding citizens at a fraction of the cost of incarceration.

B. **DESCRIPTION OF OPERATIONS:**

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

The 14th Circuit Solicitor's Office is the chief prosecuting agency for Beaufort, Jasper, Allendale, Colleton and Hampton counties. Solicitor Duffie Stone has led the office since 2006. The office has 66 full-time employees, including 26 attorneys. The majority work and/or live in Beaufort County. Our primary role is to prosecute all criminal cases in General Sessions and Family courts. Each year, we receive about 5,000 new General Sessions warrants circuit-wide, including about 2,000 in Beaufort County, 500 of which involve crimes committed on Hilton Head or by defendants who live there. We also operate prevention programs for traffic and alcohol offenders, as well as alternative-sentencing programs, such as our treatment-based Multidisciplinary Court. Moreover, our role is to distinguish offenders who battle anti-social behavior from offenders who embrace anti-social behavior. Justice entails seeking the most appropriate and effective remedies for both kinds of offender.

2. Describe in detail how the grant would be used? *(250 words or less)*

The Career Criminal Unit in Beaufort County operates with about $785,225 annually. This includes salary and fringe benefits for attorneys, investigators and a victim advocate; court-related expenses; and other administrative costs. The Town's contribution supports these operations and is applied only to Beaufort County cases. This team has proven to be a highly effective crime-control tool, earning convictions against 508 of the 559 defendants it has prosecuted since its formation in 2009 (through Feb. 10, 2025). In fact, it helped make the circuit one of just two in the state to experience a simultaneous rise in population and decline in criminal warrants since 2010, according to a 2021 SLED analysis. Because the team typically seeks maximum penalties against those it prosecutes, a higher percentage of these cases are settled in jury trials than the rest of our docket. This is an expensive but worthwhile proposition, as career criminals account for but a sliver of the criminal population but a high percentage of criminal offenses.

We expect the MDC program to operate at a cost of about $576,952 in FY2026. This includes salary and fringe benefits for seven full-time employees; compensation and training for five part-time judges; random drug screening; and program materials. The town’s contribution would defray these costs and be applied to operations in Beaufort County. This program, like the Career Criminal Unit, has a history of success, with graduation rates over the past five years regularly exceeding 80% and a median recidivism rate of 29%.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

With regard to the CCU, we likely would have to pare back Beaufort County operations, translating to slower times to court, a larger overall General Sessions backlog and more dangerous defendants out on bond for longer periods – all likely to lead to an uptick in crime.

Diminished funding for MDC would mean fewer participants and reliance on more less effective punishments. It might also jeopardize the Veterans Court component of the program, a factor considered when the military determines base closures. MDC also crucial to the circuit's fight against the opioid crisis.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

The primary benefit of CCU is a lower crime rate, fewer violent offenders on the streets and greater deterrence to the most serious crimes. MDC's primary benefit is the prevention of future career criminals and the preservation of community fabric at a much lower cost than incarceration. It is also life-saving work in the era of opioids and fentanyl. In recent years, the program brought two Hilton Head participants out of the sex trade and a third out of homelessness. Other recent graduates include two men who started own construction firms, and a third who earned a college degree.

5. Additional comments. *(250 words or less)*

Additional facts worth knowing:

- Defendants in more than a dozen Hilton Head-related cases have been successfully prosecuted by the CCU since the start of 2017. In November 2023, Solicitor Duffie Stone personally prosecuted Hilton Head resident Timothy Herndon for sexually abusing two neighbors over a period of more than five years. Herndon was convicted of five charges of criminal sexual conduct with a minor and 12 charges of sexual exploitation of a minor. None of the crimes for which he was convicted carried the possibility of a life sentence, but Solicitor Stone argued that Herndon's sentences should be served consecutively, rather than concurrently, resulting in a 110-year prison term.
- In December 2024, Samantha Molina earned a 22-year sentence against Francisco Cortes of Bluffton for attempted murder and other offenses. Cortes brought his girlfriend to an island apartment complex to have a paid sexual encounter with another man, then rained gunfire through two apartment units when the transaction took longer than he preferred. One of those wounded was an innocent roommate of the man who arranged the tryst. Bullets also penetrated walls into an adjacent apartment where more innocents lived.
- In the past six years, the MDC has served 160 participants across Beaufort County, 45 of whom have either lived, worked or committed their offense on Hilton Head. Of those 45 participants,

only one has had to be terminated from the program.

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

Since FY 2018, our office has operated on an annual budget of between \$4.4 million and \$6.9 million. Currently, 38.9% of its revenue comes from each of the five county governments and some municipalities. However, no county's appropriation covers the actual expenses of operations within its jurisdiction. Funding also is derived from program fees, such as those charged to participate in Pretrial Intervention and MDC; and grants, such as those supporting our Victims Services Center and Special Victims Unit. State funding accounts for about 42% of revenues, but often can be used only for specific, pre-determined purposes.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

80.8%	Government Sources	14.4%	Private Contributions, Donations and Grants
	Corporate Support, Sponsors		Membership, Dues, Subscriptions
4.4%	Ticket Sales, or Sales and Services	0.4%	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

The Town of Hilton Head Island has provided \$168,500 to our office each year since the 2017-18 fiscal year. Beaufort County is to provide about \$1.8 million in funding in FY2025. We are seeking a signifcant increase in FY2026. Historically, Ridgeland and Hardeeville have contributed to its operations. They now do so indirectly, through an arrangement with Jasper County, which will roughly double its contribution to our office in FY2026.

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

The CCU is financed primarily through a combination of general appropriations from county governments and the General Assembly.

For much of its history, MDC has operated only in Beaufort County because it alone could provide the community resources necessary to support it. However, before the end of FY2025, we will have extended the program throughout the circuit. We have done this almost exclusively through grant funding. We extended into Jasper and Colleton counties in 2021 using a three-year $750,000 federal grant. We successfully applied for an extension that will continue funding through FY2028. That grant, coupled with grant funding from Colleton, Hampton and Allendale's opioid settlement money, will allow us to extend into Hampton and Allendale.

With each grant used to broaden MDC's geographic

D. FINANCIAL INFORMATION:

Fiscal Year Disclosure: Start Month: July End Month: June

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

A Current Profit & Loss Report has been attached to this Application.

Profit and Loss Years Provided:

2021

3. The previous two years and current year **balance sheets**.

A Current Balance Sheet has been attached to this Application.

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2021	$168,500.00	Career Criminal and Multidisciplinary Court
2022	$168,500.00	Career Criminal and Multidisciplinary Court
2023	$168,500.00	Career Criminal Unit and Multidisciplinary Court
2024	$168,500.00	Career Criminal Unit and Multidisciplinary Court
2025	$168,500.00	Career Criminal Unit and Multidisciplinary Court

2. How were those funds used? To what extent were the objectives achieved?
(200 words or less)

The Town of Hilton Head Island provided $168,500 to our office in FY2023 and FY2024 – $118,500 in support of CCU operations and $50,000 in support of MDC.

Both programs are quite healthy in terms of key metrics, despite lingering effects of the COVID-19 pandemic. CCU has earned convictions against 132 defendants in the three years since General Sessions Court operations essentially returned to normal. In CY2024, the unit secured convictions against 27 defendants overall, 17 of them in Beaufort County. Six lived or committed their crimes in southern Beaufort County.

The MDC program also thrives. We serviced 40 Beaufort County participants at some point in CY2024. Thirty-four of its participants have graduated since the start of FY2022, 14 of them from Hilton Head. MDC maintained a 89% graduation rate in CY2023 and in CY2024 posted a 22% two-year recidivism rate (a calculation that checks the records of 2021 graduates for criminality), both surpassing the program's historic averages.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

We believe the Solicitor's Office's role is to distinguish offenders who battle anti-social behavior from offenders who embrace anti-social behavior and to seek appropriate, cost-effective remedies for both. Arguably, no two programs speak more clearly to this distinction and our mission than the Career Criminal Unit and the Multidisciplinary Court. The CCU continues to keep crime low in Beaufort County by removing the most violent and habitual offenders, an aim that is vital to public safety and the health of a tourism-based economy. The MDC helps prevent the next generation of career criminals from forming by helping residents teetering on the brink of lawlessness return to productive lives. We are particularly proud of the MDC's Veterans track, which allows us to give back to those who have sacrificed for our country, sometimes in ways that make reintegrating into civilian life difficult. Further, by its mere existence, the veterans track helps protect another important component of the local economy – our military bases. BRAC committees consider the existence of and support for programs for veterans, such as MDC's Veterans Track, in deciding which bases to close and which to keep open during realignment periods.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

Since the Career Criminal program's inception in late 2009, we have tracked the percentage of defendants convicted and the sentences they have received. Our communications team accesses our case-management system to maintain these tabulations, and they are reviewed regularly by Solicitor Stone to ensure we meet program objectives – specifically, high conviction rates and appropriately severe penalties for offenders. Our attorneys also frequently review cases collectively – both before and after disposition – to ensure our cases are thoroughly and ethically presented, and to improve the quality of future prosecutions.

Similarly, data-driven procedures are coupled with qualitative exercises to ensure the efficacy of other Solicitor's Office programs, including MDC. Participation statistics are tracked monthly. Recidivism statistics are updated and tracked quarterly and annually. Program director Lee Reavis also communicates regularly with other program leaders, during which they discuss the key performance indicators of each and suggest ways to create synergies across departments. Comments from these interactions, as well as data performance indicators are compiled into a monthly dashboard presented to Solicitor Stone. This ensures progress is constantly monitored and problems quickly addressed at our office's highest level.

F. **EXECUTIVE SUMMARY**

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

An Effectiveness Measurement spreadsheet has been attached to this application.

Signature: Jeffrey Kidd

Title/Position: Administrative Chief of Staff

Mailing Address: 108 Traders Cross, Suite 103, Bluffton, SC 29909

Email Address: jkidd@scsolicitor14.org

Phone Number: 843-790-6439

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Beaufort County Economic Development Corporation

Project Name: BCEDC FY 25 Affiliate Agency Application

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

The $42,000 in funds contributed will be used to fund overall operations that drive to the success that you can see in the attached scorecard that the BCEDC uses to measure success. As you can see in the attached materials the largest portion of funds are used for staffing, marketing, lead generation, office space and equipment.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/13/2025	Time Received: 08:57 PM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Beaufort County Economic Development Corporation

Project/Event Name: BCEDC FY 25 Affiliate Agency Application

Contact Name: John A. O'Toole Title: Executive Director

Address: PO Box 7017, Hilton Head Island, SC 29938

Email Address: jotoole@thrivebeaufort.org Contact Phone: 860-685-0689

Total Budget: $2,103,669.00 **Grant Amount Requested:** $42,000.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

We will use the requested funds for operations of the Beaufort County Economic Development Corp. The BCEDC's focus is on diversifying the county's economy and fostering responsible growth. We are positioned to be the collaborative entity for organizing, structuring and leading economic Development efforts on behalf of Beaufort County's residents. Since inception (2017) we have facilitated 75 deals, amounting to $503 million and 2,081 new and retained jobs. The BCEDC will use the funds (leveraged with county funds) for overall operations which includes marketing, lead generation, staff and benefits, travel and meals, site development and incentives.

B. **DESCRIPTION OF OPERATIONS:**

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

We will use the requested funds for operations of the Beaufort County Economic Development Corp. The BCEDC's focus is on diversifying the county's economy and fostering responsible growth. We are positioned to be the collaborative entity for organizing, structuring and leading economic Development efforts on behalf of Beaufort County's residents. Since inception (2017) we have facilitated 75 deals, amounting to $503 million and 2,081 new and retained jobs. The BCEDC will use the funds for overall operations which includes marketing, lead generation, staff and benefits, travel and meals, site development and incentives.

2. Describe in detail how the grant would be used? *(250 words or less)*

As stated earlier, The BCEDC will use the funds for overall operations which includes marketing, lead generation, staff and benefits, travel and meals, site development and incentives. The requested funds are leveraged with $42,000 contributions from Bluffton, Beaufort and Port Royal, and $393,750 operations funding from Beaufort County, and $3.5 million from the County for site development and grants to companies. The balance of our budget comes from utility tax credits, sponsors, interest income and state grants.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

If we were partially funded, we would find a way to still provide services to Hilton Head Island. With that said, we hope that the town believes that its contribution of $42,000 provides an excellent return on investment.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

Our work diversifies the local economy, puts underutilized properties into productive use, increases tax base and provides jobs for community members. We have worked with the county to fund product development in the county. These funds could be utilized for developments at 355 William Hilton Parkway, Palmetto Bay Business Park, Summit Drive and other sites to be identified as Hilton Head Island priorities. The BCEDC looks forward to working with the Town of Hilton Head Island using county site funds and Special Source Revenue Credits to move workforce housing forward on the island.

5. Additional comments. *(250 words or less)*

We consider it a priveledge to provide economic development services to Hilton Head Island and Beaufort County. We strive to deliver value and believe we have and will continue to do so! We will continue to work with town staff to make sure our work is on target with community expectations.

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

Currently our funding is as follows:

Town of Hilton Head Island $40,000, City of Beaufort $40,000, Town of Bluffton $40,000, Town of Port Royal $40,000

Beaufort County (Operations) $375,000, Beaufort County (Site and Jobs Fund - new and carry-over) $3,500,000

Grants, Utility Tax Credits and Sponsorships $650,869.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

86	Government Sources	10	Private Contributions, Donations and Grants
2	Corporate Support, Sponsors	0	Membership, Dues, Subscriptions
0	Ticket Sales, or Sales and Services	2	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

We are requesting the amounts shown below from each government entity:

- Bluffton - $42,000
- Beaufort - $42,000
- Hilton Head Island - $42,000
- Port Royal - $42,000
- Beaufort County - $ 393,750 operations, $3,500,000 for site development and project incentives.

This represents a 5% increase for operations.

This represents a 5% increase to each of our municipal parters.

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

Throughout the year we apply for funding through the South Carolina's Departments of Agriculture and Commerce as notices of funding are announced.

D. **FINANCIAL INFORMATION:**

Fiscal Year Disclosure: Start Month: July End Month: June

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   FY 22
   FY 23
   FY 24

3. The previous two years and current year **balance sheets**.

   A Current Balance Sheet has been attached to this Application.

   Balance Sheet Years Provided:

   22

23

FY 24

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2022	$25,000.00	BCEDC - Town Contribution
2022	$25,000.00	BCEDC - Annual Town Support
2021	$25,000.00	Operations
2020	$25,000.00	BCEDC - Annual Town Support
2023	$40,000.00	BCEDC - Annual Town Support
2024	$40,000.00	BCEDC - Annual Town Support

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

The Hilton Head Island Funds were used to support operations.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

According to Clemson's Regional Economic Analysis Lab, the work of the BCEDC will have the following impact on Hilton Head Island: "The total impact on compensation is projected to be approximately $6.1 million in 2024; cumulatively (summed across all years), compensation in the Town is projected to be $236 million over the years 2024-2030. Annual output (total sales) is projected to be approximately $157.1 million in 2024, for a cumulative impact of $1.1 billion over the years

2024-2030. Note that the employment and output numbers for the Town include direct effects, as these businesses will be located within the Town. Compensation projections are by place of residence, so they are not assumed to be localized within the Town limits.

The estimated impact of the new entrants' capital investment and operations on town government is projected to be net positive in each year, i.e., the positive impact on revenues is projected to exceed the impact on expenditures. The impact on annual net revenue is projected to be approximately $229,000 in 2023 and $712,000 in 2024. Cumulatively, the Town is projected to see a positive net revenue impact of $4.4 million between 2024-2030."

This report can be updated if requested.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

We measure success by the total investments made, job creation and the quality of the jobs - annual salary.

F. **EXECUTIVE SUMMARY**

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

An Effectiveness Measurement spreadsheet has been attached to this application.

The $42,000 in funds contributed will be used to fund overall operations that drive to the success that you can see in the attached scorecard that the BCEDC uses to measure success. As you can see in the attached materials the largest portion of funds are used for staffing, marketing, lead generation, office space and equipment.

Signature: John A. O'Toole

Title/Position: Executive Director

Mailing Address: PO Box 7017, Hilton Head Island, SC 29938

Email Address: jotoole@thrivebeaufort.org

Phone Number: 860-685-0689

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Coastal Community Development Corporation

Project Name: Hilton Head Island Workforce Housing

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/11/2025	Time Received: 12:07 AM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Coastal Community Development Corporation

Project/Event Name: Hilton Head Island Workforce Housing

Contact Name: Carletha Frazier Title: Project Manager

Address: 1000 Main Street Suite 100 B, Hilton Head, SC 29926

Email Address: carletha@ccdc-sc.org Contact Phone: 843-715-4209

Total Budget: $6,000,000.00 **Grant Amount Requested:** $750,000.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

$700,000 of the grant would be used for down payment capital for the purchase of affordable workforce housing. The grant would be used for no more than 20% of the down payment on units and will be matched by 80% of down payment capital from sources including donations, altruistic capital and private and bank mortgages.

$50,000 of the grant would be used to assist in administrative operations funding.

B. DESCRIPTION OF OPERATIONS:

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

   The Coastal Community Development Corporation (CCDC) seeks to increase the availability of homes for our local and regional workforce by preserving existing housing, redeveloping existing property and developing new property to meet the demand of our region while serving working residents.

   The purpose of requested funding is to purchase units that are for sale on Hilton Head Island and make them available as rental units to workers earning between 50% - 120% of area median income and keep the future rents of those units tied to the AMI restrictions for a period of 99 years. The requested funds would be used as down payment capital representing no more than 20% of the purchase price of units purchased.

   Preservation of workforce housing units by the CCDC ensures that units that are sold will not end up in the short term rental market and will often return inventory of housing to the long term market from the short term market. The benefit to the Island's citizens and visitors is an increase in workforce availability and increased quality and availability of services as well as increased tax revenues to the Town from local businesses who are, at present, unable to operate at full staffing and business levels.

2. Describe in detail how the grant would be used? *(250 words or less)*

   The CCDC will deploy $700,000 of grant funds as downpayment capital for housing units on HHI that will serve workers and families with household incomes between 50%-120% of AMI. The units will be deed restricted to serve those AMIs for 99 years to provide long term benefits to the community.

   The grant funds used for down payment capital of purchases would be matched by altruistic capital and donations that the CCDC has raised for a total of 40-50% in down payment capital.

Local bank and private mortgages will fund the remaining 50-60% of the purchases

The sources of other funds includes altruistic capital loaned to CCDC for 10 years at 3% APR raised through unsecured promissory notes and through local bank and private mortgage funding secured for 10 years at 7.25% or lower.

$50,000 of the grant funds would be used to assist in funding administrative operations of the organization.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

Partial funding would reduce the amount of units the CCDC can purchase to preserve workforce housing units. The CCDC would continue to pursue its mission of providing workforce housing but would be limited in its impact due to partial funding.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

Preservation of workforce housing units by the CCDC ensures that units that are sold will not end up in the short term rental market and will often return inventory of housing to the long term market from the short term market. The benefit to the Island's citizens and visitors is an increase in workforce availability and increased quality and availability of services as well as increased tax revenues to the Town from local businesses who are, at present, unable to operate at full staffing and business levels.

5. Additional comments. *(250 words or less)*

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

The administrative budget is funded through donations from local businesses and residents which total in excess of $100,000 in 2024. Additional the operation of the CCDC produces positive cash flows from rental activity that provides administrative operating funds which totaled over $10,000 in 2024. All funding through municipal sources, altruistic capital and bank loans is used for acquisition capital.

The acquisition capital raised from 2023-2024 for the organization's work on Hilton Head Island totaled over $3.5m from donations, altruistic capital, private and bank mortgages and a $600,000 grant from the Town of Hilton Head Island in 2024.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

15	Government Sources	35	Private Contributions, Donations and Grants
15	Corporate Support, Sponsors		Membership, Dues, Subscriptions
	Ticket Sales, or Sales and Services	35	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

Over $100,000 has been secured in donations and altruistic capital from residents of Hilton Head Island. CCDC will be seeking altruistic capital from other communities on Hilton Head Island and throughout Beaufort County.

Bank loan and private mortgage funding has been secured with a 10 year term for the debt financed at 7.25% or lower for a total of $400,000.

D. FINANCIAL INFORMATION:

Fiscal Year Disclosure: Start Month: January End Month: December

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   2023

3. The previous two years and current year **balance sheets**.

   A Current Balance Sheet has been attached to this Application.

   Balance Sheet Years Provided:

   2023

E. MEASURING EFFECTIVENESS:

1. List any award amounts received in fiscal year 2024 and/or 2025.

2024	$600,000.00	Hilton Head 1

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

The $600,000 grant from the Town of Hilton Head Island assisted the CCDC in purchasing 14 housing units on Hilton Head Island. Those units are now preserved for Workforce Housing for 99 years and will be rented to households earning between 50%-120% of Beaufort County Area Median Income. We set out to purchase at least 12 units with the funds and were able to to extend the funds to 14 units.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

The 14 units purchased by the CCDC had a dramatic impact on our organization, allowing us to make an impact in providing housing to 14 working households who now can count on affordable workforce housing availability in the future. Each of these properties has been restricted via deed restriction or board consent to ensure they remain affordable to workers whose household income is between 50-120% of area median income. This outcome offers housing security and each of the renters will have the opportunity to purchase the unit they currently rent and the deed restriction will remain in place after a sale to ensure affordability for future renters.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

The Coastal Community Development Corporation measures effectiveness by successfully purchasing units and renting them to workers in the community that they live in.

F. EXECUTIVE SUMMARY

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

An Effectiveness Measurement spreadsheet has been attached to this application.

Signature: Alan Wolf

Title/Position: Board Chairman

Mailing Address: 92 Toppin Drive, Hilton Head Island, SC 29926

Email Address: alan.wolf.jr@gmail.com

Phone Number: 843-226-2840

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Coastal Discovery Museum

Project Name: Museum Management Fee

Executive Summary

When the Coastal Discovery Museum moved to Honey Horn in 2002, it was because of the vision of Tom Peeples - that this special piece of property should be preserved and that the town should have a great museum. The Town invested in infrastructure - water, sewer, electricity, and roads. The museum invested in restoring historic buildings, developing permanent and temporary exhibitions, and creating new structures such as our docks and butterfly habitat. Over the course of five years, the land was transformed from a dilapidated farm to a Lowcountry gem.

The Coastal Discovery Museum is now a mainstay for both local residents and tourists visiting Hilton Head Island. Our 68-acre historic property and museum are open for all to enjoy free of charge, and we offer year-round programming for all ages. We hosted our first visitors at Honey Horn in 2007 and have steadily grown our programs to become a vital part of the island's recreation, leisure, and educational economy. Since then we have reached over 1.7 million patrons, including over 1 million tourists. The Town of Hilton Head Island grant support over the past 23 years is a significant part of this success. It has allowed us to continue operating in difficult times, including while we served as a FEMA debris management site after Hurricane Matthew and during the COVID-19 pandemic.

The Coastal Discovery Museum has an important mission – to inspire people to care for the Lowcountry – but we also strive to be a business that operates ethically, sustainably, and efficiently. Governmental funding provides approximately 30% of the museum's operating budget and without it our marketing efforts, programming, and facilities would not be performing at the level required to maximize our benefit to the tourism economy and the local community. We know that funding is limited and we are careful to be responsible stewards of this grant.

Governmental funding has allowed us to serve the public good, to market and maintain the Town of Hilton Head Island's Honey Horn property as an active and vibrant destination for residents and visitors to enjoy. We want to continue to be a strong partner with the town in hosting community-focused events on our property and town support allows us to do so at no charge to the town when is serves the public good. We are particularly proud of the service that we provide to area schools, teaching the next generation of Hilton Head residents to value our environment, history, culture, and art so that we can maintain the island that we love today for future generations. Town support of this initiative means that we can provide 10,000 school program experiences at Honey Horn per year, in addition to all of the other ways we enrich living on this island.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/14/2025	Time Received: 02:18 PM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Coastal Discovery Museum

Project/Event Name: Museum Management Fee

Contact Name: Rex Garniewicz	Title: President and CEO
Address: 70 Honey Horn Drive, Hilton Head Island, SC 29926	
Email Address: rgarniewicz@coastaldiscovery.org	Contact Phone: 843-415-8500
Total Budget: $1,931,200.00	**Grant Amount Requested:** $141,650.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

Coastal Discovery Museum has flourished through support from the Town of Hilton Head Island. The private/public partnership keeps the museum and grounds open free of charge as a public benefit to residents and visitors. We request continued support for three partial salaries, the Director of Finance 50%; Curator of Education 70%; Museum Educator 70%, providing museum management and educational opportunities for local children and adults. We are requesting a new line of 50% salary of a horticulturalist who will work on our grounds and in collaboration with the Town on initiatives including environmentally friendly landscaping, integrated pest management and composting.

B. **DESCRIPTION OF OPERATIONS:**

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

The mission of the Coastal Discovery Museum is to inspire people to care for the Lowcountry. We do so by teaching them about our fragile environment, fascinating history, complex culture, and by encouraging them to take an active role as stewards of these resources. This requested funding for our 501(c)3 allows us to fulfill this mission with a focus on local residents. We have identified a strong need for hands-on activities in art, nature, and science with local schools - both public and private, but many of these programs are scholarshipped or have fees that only cover the cost of materials. Likewise, many of our adult-focused educational opportunities with the highest impact are not revenue positive. This affiliated agency request helps us serve the local community and enhance education on the island.

We have also added a new line to this request. In alignment with the town's "Our Plan" we want to be a lead partner in environmental sustainability. We are hiring a full-time horticulturalist who will help with our gardens and grounds, but will also be the lead in helping us design sustainable landscaping options, work with the town on our integrated pest management policy over our 70-acre property, and help manage an onsite composting effort that will help us process all of the organic waste produced onsite into compost for our grounds and gardens.

These positions truly support our public private partnership with the town and will help to continue improving environmental sustainability through both education and implementation.

2. Describe in detail how the grant would be used? *(250 words or less)*

The museum makes every attempt to secure revenue from outside the town's operating budget. Most museum positions are self sufficient from program fees, grants (including ATAX), and fundraising activities. The management of museum operations and finances by the Director of Finance and our two education positions serve the public good by keeping the museum open to the public and providing 10,000 student experiences per year for our local school kids. These positions are not fully funded through earned revenue because we do not want to have a barrier to access for people who cannot afford to pay to come to the museum or participate in our school programs. This grant, which we have received for the past 18 years will allow us to continue providing these services. Support from the Town of Hilton Head Island through the Museum Management Fee allows the museum to be open to the public free of charge, and permits us to serve all members of our community with our engaging education programs.

For our additional request to provide support for a horticulturalist, we want to enhance the experience for residents visiting our property and exploring our grounds and gardens, but we also want to support town-driven efforts towards sustainability with our environment, pest management, and waste reduction. Honey Horn is one of the town's premier properties and we want to ensure that it is cared for in a way that highlights the natural environment and historic landscape that is so well-loved by our community.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

The Town has provided Museum Management Fee support to the Museum since 2007. This request includes a $3,950 cost of living increase and a new funding line of $30,000, which is 50% share of a horticulturalist position.

The museum has and will fund any unfunded portions of these positions through our regular operating funds. If we were not fully funded we would continue our outside fundraising efforts to cover the difference, and if we did not succeed the horticulturalist position would likely be a half-time position with decreased availability to coordinate and collaborate with town staff.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

The town is fortunate to have a museum that is open to all, free of charge, which can inspire everyone here. The museum, as a private 501c3, can raise philanthropic donations and grants to help cover operational costs and fully staff this 70-acre property at a cost that is significantly less than if the town maintained and operated the property itself. We intend to continue to broaden what we do to serve citizens, visitors, and the Town. As part of our new strategic plan we are focusing significant efforts to better serve the community and engage local residents.

5. Additional comments. *(250 words or less)*

Coastal Discovery Museum has become an integral part of Hilton Head Island's recreation, leisure, and educational landscape and will continue to grow to better serve the Island's citizens and visitors. The museum has recently completed a $1.8m project to renovate the existing hay barn into an exhibition space to tell the story of Santa Elena, named in 1526 on Hilton Head Island and in 1566 on Parris Island, the first European capital in North America. This first chapter of American history is now in SC 4th and 8th grade textbooks and will see increased demand on our educators in the coming years. We are excited that the museum will be the center for telling this great American story.

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

Coastal Discovery Museum operations are funded through multiple income streams. Grants total $534,000; including ATAX, corporate, and federal grants. Our program, events, and rental revenues total $375,000. Our store sales, membership, and individual donations total $600,000. We receive $32,000 in interest on CDs. We also benefit from $107,700 in direct town funding as an Affiliated Agency. We earn approximately half of our operating budget through our business operations while still keeping the grounds open to visitors free of charge. Earned revenue reduces the public cost of operating this town-owned property and maintains it as one of the jewels of HHI.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

30	Government Sources	33	Private Contributions, Donations and Grants
4	Corporate Support, Sponsors	4	Membership, Dues, Subscriptions
10	Ticket Sales, or Sales and Services	19	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

2026 HHI ATAX Cultural and Ecotourism $400,000

2026 Beaufort ATAX 2% $12,500

2025 Beaufort 3% ATAX $250,000

2025 Beaufort ATAX 2% $37,500

2025 HHI ATAX Cultural and Ecotourism $375,000

2025 HHI ATAX Capital $300,000

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

Funding for the remaining portions of these salaries come from other grants and donations to the museum. We are particularly indebted to Bargain Box for supporting the materials cost for most of our educational programs.

We have raised $60k of a $100k goal to develop a comprehensive master plan for our property which will include a botanical garden. We envision this new horticulturalist position a key part of this overall initiative to improve our property to better serve the community.

D. **FINANCIAL INFORMATION:**

Fiscal Year Disclosure: Start Month: July End Month: June

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   FY 2022
   FY 2023
   2024

3. The previous two years and current year **balance sheets**.

A Current Balance Sheet has been attached to this Application.

Balance Sheet Years Provided:

FY 2023

FY2024

FY2024

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2023	$102,432.00	Museum Management Fee
2024	$107,700.00	Museum Management Fee

2. How were those funds used? To what extent were the objectives achieved?
(200 words or less)

These funds were used to manage the museum and operate some of our educational programs. In our fiscal year ending June 2024 we served over 129,000 people, over 123k on our Honey Horn property, including 7320 in our educational programs and over 10,000 other family program experiences led by our education staff. In the first six months of this year, from July-December 2023 we have had over 60,000 people on our property, a 10% increase from the prior year. Much of this is due to our strong programming which is made possible by the support we receive from the Town of Hilton Head, specifically the partial funding for staff positions including our Director of Finance and our Museum Educators. Without this support we would not be able to serve so many people and fully maintain this town-owned property.

We hear from both students and teachers that the experiences we provide improve the educational opportunities for everyone on the island - many of these programs are not possible in the schools - hands on programs on our property expose kids to science, art, culture, and history in new and exciting ways. This is one of the ways the town enhances local education.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

Over the past 17 years, support from the Town of Hilton Head Island has really allowed the museum to flourish and serve our entire community. Over that period of time, the museum has more than doubled its attendance and revenue. The museum has, or is in the process of, renovating all of the town-owned buildings on the Honey Horn property, and staffs and manages the property for the benefit of all Hilton Head Island residents. We would not have this success without the support of the town in the form of the management fee, assistance with financial accounting and reporting, as well as regular landscaping services. This museum on Town-owned land which is operated by a separate 501(c)3 organization is a model public-private partnership in serving the Hilton Head Island community.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

Overall effectiveness is measured in increased mission-based attendance, serving as a community resource, and connecting residents to the assets that make this island so special. One of our strongest qualitative measures of success in this category is the quality of reviews we receive online from sources like TripAdvisor where we are the top thing to do on the Island after the beach and bike trails. We have also started a regular survey of participants in our programs to see if they have changed the way they think about things or take new actions based on our programs. Some have had a success rate of over 80% of respondents. We use these data to improve our mission based programming and develop new educational opportunities.

F. **EXECUTIVE SUMMARY**

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

When the Coastal Discovery Museum moved to Honey Horn in 2002, it was because of the vision of Tom Peeples - that this special piece of property should be preserved and that the town should have a great museum. The Town invested in infrastructure - water, sewer, electricity, and roads. The museum invested in restoring historic buildings, developing permanent and temporary exhibitions, and creating new structures such as our docks and butterfly habitat. Over the course of five years, the land was transformed from a dilapidated farm to a Lowcountry gem.

The Coastal Discovery Museum is now a mainstay for both local residents and tourists visiting Hilton Head Island. Our 68-acre historic property and museum are open for all to enjoy free of charge, and we offer year-round programming for all ages. We hosted our first visitors at Honey Horn in 2007 and have steadily grown our programs to become a vital part of the island's recreation, leisure, and educational economy. Since then we have reached over 1.7 million patrons, including over 1 million tourists. The Town of Hilton Head Island grant support over the past 23 years is a significant part of this success. It has allowed us to continue operating in difficult times, including while we served as a FEMA debris management site after Hurricane Matthew and during the COVID-19 pandemic.

The Coastal Discovery Museum has an important mission – to inspire people to care for the Lowcountry – but we also strive to be a business that operates ethically, sustainably, and efficiently. Governmental funding provides approximately 30% of the museum’s operating budget and without it our marketing efforts, programming, and facilities would not be performing at the level required to maximize our benefit to the tourism economy and the local community. We know that funding is limited and we are careful to be responsible stewards of this grant.

Governmental funding has allowed us to serve the public good, to market and maintain the Town of Hilton Head Island’s Honey Horn property as an active and vibrant destination for residents and visitors to enjoy. We want to continue to be a strong partner with the town in hosting community-focused events on our property and town support allows us to do so at no charge to the town when is serves the public good. We are particularly proud of the service that we provide to area schools, teaching the next generation of Hilton Head residents to value our environment, history, culture, and art so that we can maintain the island that we love today for future generations. Town support of this initiative means that we can provide 10,000 school program experiences at Honey Horn per year, in addition to all of the other ways we enrich living on this island.

Signature: Rex Garniewicz

Title/Position: President and CEO

Mailing Address: 70 Honey Horn Dr, Hilton Head, SC 29926

Email Address: rgarniewicz@coastaldiscovery.org

Phone Number: 843-415-8500

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Hilton Head Island Recreation Association

Project Name: Island Rec Budget

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

The Association has greatly appreciated the 40-plus year relationship with the Town. The partnership has helped the Association and the Town thrive while serving the community. In 2024, we provided 125 plus programs and events for community members of all ages, and managed the scheduling of the Island Recreation and Senior Center, also while coordinating the scheduling of Town owned parks.

The Board of Directors believed that the request for FY 26 has anticipated growth through the Association's programs. The funding request to the Town in FY26 is a (5.5%) increase from FY25. The program (2%) and event/other income (2%) are budgeted for increases. The overall FY 26 budget has a (3.5%) increase.

In the NRPA Performance review for both 2023 and 2024, the Association provides programs and events that are similar to communities of the same size.

The Board is anticipating several headwinds, including the continued recruiting and maintaining quality employees—the additional cost of doing business. The Board has a Human Resource Committee working with the staff to tackle employment issues.

We appreciate the opportunity to come before the F&A Committee to outline our services and funding request for FY 26.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/14/2025	Time Received: 10:10 AM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Hilton Head Island Recreation Association

Project/Event Name: Island Rec Budget

Contact Name: Frank Soule   Title: Executive Parks and Recreation Director

Address: P.O. Box 22593, HILTON HEAD ISLAND, SC 29925

Email Address: frank.soule@islandreccenter.org   Contact Phone: 843-683-7203

Total Budget: $3,920,645.00   **Grant Amount Requested:** $1,252,366.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

The Association presents this funding request with these objectives; to provide the best in class recreational services to the community, while effectively managing the world-class recreational facilities.

B. DESCRIPTION OF OPERATIONS:

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

The Hilton Head Island Recreation Association is a non-profit organization founded in 1977 to provide recreation programs to the community with the development of the Island Youth Center by the Hilton Head Island Rotary Club. As the Island continued to grow so did the Association. The first MOU with the Town was in 1986 for the development, construction, and program management of the Island Recreation Center which opened in 1988. This long-standing partnership has led to many projects such as the development of Crossings and Chaplin Parks and the Island Recreation Center's enhancement and expansion, which reopened in 2019. In 1992, the Senior Center joined the Association to provide senior programs. The Association and the Town of Hilton Head Island renewed their MOU in 2024 for another 10 years.

The Association has 17 volunteer board members, 20 volunteer advisory board members, a Town Council member who is an ex-officio member of the Board, and a Town staff member who serves as a liaison to the Island Rec staff.

There are 19 full-time staff members, and 33 part-time (summertime/part-time is 60 plus). The Association provides over 125 programs and community events annually, with 651,414 participant visits. Through the Carmine's Scholarship Foundation, the Association has awarded over $252,740 to families in need to ensure that no child is denied recreation or education programs at the Island Recreation Center. The main focus of these scholarships is on Preschool and Youth Programs.

Volunteers donate over 20,574 hourly assistance to the Association annually.

2. Describe in detail how the grant would be used? *(250 words or less)*

The funding provided by the Town of Hilton Head Island allows residents to participate in community-wide public recreation programs, community events, and effective facility management. These efforts promote health and wellness and build community through positive parks and recreation programs.

The Island Recreation Center is open seven days a week. Monday-Friday 5:30 am – 9:00 pm, Saturday 8:00 am to 3:00 pm, and Sunday 11:00 am to 3:00 pm. Hours vary and will be extended depending on programs and program times. The Hilton Head Island Senior Center hours are Monday-Friday, 8:30 am to 4:00 pm. There are times when usage starts early or goes beyond normal hours of operation.

The Association staff coordinates the scheduling of Town-owned parks, including the following: Bristol Sports Rink, Crossings Park, Chaplin Community Park and Tennis Facility, Shelter Cove Community Park, Barker Field Extention, Barker Field, Lowcountry Celebration Park, Jarvis Creek Park, Middle Island Tract, the Sailing and Rowing Center at Squire Pope Rd and through the extended MOU are additional parks to schedule. The scheduling includes athletics, shelter rentals, and community events.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

If full funding was not received, there would be an increase in program fees and sponsorships, along with exploring grant and fundraising opportunities. The Association would also have to look at a reduction in the hours of operations at Island

Rec and Senior Centers. The elimination of programs and events in conjunction with cutting staff salary increases, reducing part-time staff hours, and termination of staff positions.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

Here are five statements showcasing the fundamental role of parks and recreation in our community, and the services the Association provides to the residents and visitors.

Promoting Health and Wellness

Programs and educational activities are critical to childhood development

Drives economic opportunities

Strengthens communities and brings people together

Parks Build Community

5. Additional comments. *(250 words or less)*

The Town's Finance Department prepares weekly payable checks and bi-weekly payroll for the Association. The Town provides a monthly financial statement and general ledger report. The Town and the Association coordinate the production of an annual audit through the contracted firm. Annual Capital Expenditures are reviewed by the Town for reimbursement to the Association. All financial records are available to the public.

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

The Association's funding comes from program fees, sponsorships, community events, annual fundraising, and government support. These resources
allow the Association to continue the effective
management of recreational facilities, as well as the coordination of recreation programs and community events. The percentage
breakdown is below in the application.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

32	Government Sources	5	Private Contributions, Donations and Grants
5	Corporate Support, Sponsors	58	Membership, Dues, Subscriptions
0	Ticket Sales, or Sales and Services	0	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

FY 24 $1,123,766

FY 25 $1,167,388

FY 26 request $1,252,366

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

The Association anticipates funds totaling $2,668,279 from program fees, sponsorships, community events, and fundraising.

D. **FINANCIAL INFORMATION:**

Fiscal Year Disclosure: Start Month: July 1 End Month: June 30

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   FY 21 and FY 22

FY 23
FY 24

3. The previous two years and current year **balance sheets**.

A Current Balance Sheet has been attached to this Application.

Balance Sheet Years Provided:

FY 22

FY 23

FY 24

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2021	$1,060,707.00	Recreation Programs and facilities management
2022	$1,087,578.00	Recreation Programs and facilities management
2023	$1,099,304.00	Recreation Programs and facilities management
2024	$1,123,766.00	Recreation Programs and facilities management
2025	$1,167,366.00	Recreation Programs and facilities management

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

The funds received were used to implement community-wide recreation programs and maintain the Island Recreation and Senior Centers, along with schedule coordination of the Town parks.

The participation levels at programs and community events met the expectations set by the Board.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

The success of the Association is critical to the well-being of the community. Without positive recreation programs for all ages along with established park systems, our community will fail its residents. The partnership with the Town has allowed the Association to create world-class recreation programs and aided in the management of facilities. The residents have had far-reaching benefits from health and wellness to social activities which produce an ongoing sense of community.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

The Association measures the effectiveness of our program through the evaluations of program participants, staff, and volunteers. These evaluations are then reviewed by the Association's Program Review Committee, which reports to the Board of Directors. The Board and Staff address any suggestions or concerns.

The Association surveys the community annually. It addresses facilities' usage, event attendance, and marketing, along with opportunities to suggest improvements and how to receive information for the Association. Survey results are reviewed by the Executive Committee and then by the Board with recommendations being given to the staff for implementation.

The Association also surveys the attendees to make certain that we are providing great community events. The Association works to ensure that the marketing dollars spent to market the events are being spent to attract the most attendees as possible by specifically asking which marketing source drew them to the area and if it was specifically for the event or secondary.

Our program success is also measured by the children's success in our programs, the return of attendees, and parents' responses through program surveys. We could not continue to grow the programs every year without the overwhelming response from families about how their children have thrived and enjoyed the programs and the joy they see in their children during these programs.

F. **EXECUTIVE SUMMARY**

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

An Effectiveness Measurement spreadsheet has been attached to this application.

The Association has greatly appreciated the 40-plus year relationship with the Town. The partnership has helped the Association and the Town thrive while serving the community. In 2024, we provided 125 plus programs and events for community members of all ages, and managed the scheduling of the Island Recreation and Senior Center, also while coordinating the scheduling of Town owned parks.

The Board of Directors believed that the request for FY 26 has anticipated growth through the Association's programs. The funding request to the Town in FY26 is a (5.5%) increase from FY25. The program (2%) and event/other income (2%) are budgeted for increases. The overall FY 26 budget has a (3.5%) increase.

In the NRPA Performance review for both 2023 and 2024, the Association provides programs and events that are similar to communities of the same size.

The Board is anticipating several headwinds, including the continued recruiting and maintaining quality employees—the additional cost of doing business. The Board has a Human Resource Committee working with the staff to tackle employment issues.

We appreciate the opportunity to come before the F&A Committee to outline our services and funding request for FY 26.

Signature: frank soule

Title/Position:

Mailing Address: P.O. Box 22593, HILTON HEAD ISLAND, SC 29925

Email Address: frank.soule@islandreccenter.org

Phone Number: 843-683-7203

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Lowcountry Regional Transportation Authority

Project Name: Lowcountry Regional Transportation Agency Local Match Request

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

In FY2025, Palmetto Breeze provided its daily commuter service to and from Hilton Head Island, the seasonal Breeze Trolley service, the weekend Coligny Beach Parking Shuttle (from May to September), and a variety of special event transportation services. We estimate that the Town's FY25 $253,595 affiliated agency grant investment returned $1,267,975 (according to APTA-standard economic impact ratio of 5X) in economic benefits to the community. Additionally, the seasonal Breeze Trolley service provided significant congestion relief and enhanced the Island experience for tens of thousands of visitors and residents alike.

Summary of 2024 Breeze Trolley Season

Hilton Head Island's Breeze Trolleys delivered a total of approximately 35,303 passenger trips for the entire 2024 season, representing steady use of the trolley service year-over-year. Having an increase in ridership over 2023 is considered especially successful since we had 11 fewer operating days due to starting the season later than 2023, and missed two service days for severe weather. We estimate this equates to keeping approximately 13,000 cars off the Town's roadways during the peak season.

Additional 2024 Season highlights included:

- We adjusted our South Island Route to include a stop at Shelter Cover Harbour & Marina (trolley stop #2) in both the southbound and northbound directions to enhance passengers convenience and reduce ride times.
- The safety performance was once again outstanding.
- Our trolley maintenance team achieved a season that included 100% PM

compliance and 100% vehicle availabilty for the two trolley routes.

- We increased our Facebook followers to 5,150, representing a 20% percent increase over 2023. Most of these followers (about 80%) continue to be from outside the HHI/Savannah area.
- Website traffic continues to be strong with expedient responses to all inquiries.
- Passenger reviews online and in person were consistently positive, especially concerning trolley operator courtesy, convenience, the free fares, and the new route changes.
- Improved vehicle tracking for passengers via the free CatchTheBreeze app.
- A total of 35,000 24-panel Rider's Guides were printed and distributed throughout the season. The Guides were made possible due to advertising support from a record 22 local businesses and organizations, mostly located along the trolley routes.
- Development and distribution of a Spanish version of the Breeze Trolley Map and times.
- 2024 promotions included several special ride-along events, adjustments for the July 4th fireworks in Shelter Cove, and the successful pilot test of a solar-powered trolley stop light to enhance safety and security.
- The last weekend of August (between the end of the high travel season and the Labor Day weekend) we again conducted a special promotion called "Breeze Trolley ROCKS! – A Ride and Find Adventure" involving painted rocks for passengers to find, re-hide and share on social media. This second annual event was very popular amongst our passengers and followers, and included prize packages with contributions from more than a dozen of our trolley partners. The result was a weekend of ridership on par with other similar summer weekends instead of experiencing a drop in ridership as the number of visitors riding trailed off.
- An additional 1,800 passengers were transported to support the Culture HHI Lantern Parade activities in November.

Comparison of 2024 Ridership to Previous Seasons

Service Year	Notes	Total Passengers
2018	Inaugural year (July to Oct)	5,000
2019	First Full season (April to Sept)	18,000

2020	COVID-shortened (late Jun-Sept); fare-free	4,400
2021	Full season (April to Sept); fare-free; added Mid-Island Route	52,000
2022	Full season (April to Sept); fare-free; adjusted both the Mid-Island and South Island Routes	43,000
2023	Full season (April to Sept); fare-free	34,500
2024	Full season (April to Sept); fare-free	35,300

Expected Public Benefit

The most important benefit to the Town's citizens, visitors, and the community as a whole is the enhanced mobility and access to jobs provided by Palmetto Breeze's daily commuter services. With limited affordable workforce housing in the immediate area, the Island's economy depends heavily on cost-effective, low-fare, daily commuter services for employees to access jobs.

Additionally, the Breeze Trolley service has become an enhancement to the Island Experience for thousands of annual visitors, and is significantly contributing to reduced congestion on the Town's roadways.

If approved and funded, the special Holiday Season Trolley service will give back to the community in a whole new way, making free trolley service available for the first time in the off-season, and affording residents and visitors a "hands-free" alternative to taking in many of the Island's most notable holiday light displays.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/12/2025	Time Received: 02:58 PM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Lowcountry Regional Transportation Authority

Project/Event Name: Lowcountry Regional Transportation Agency Local Match Request

Contact Name: Kristine Hepburn	Title: Director of Finance & Administration
Address: P.O. Box 2029, 25 Benton Field Rd., Bluffton, SC 29910	
Email Address: khepburn@palmettobreezetransit.com	Contact Phone: 843-757-5784
Total Budget: $7,274,595.00	**Grant Amount Requested:** $507,051.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

The LRTA (Palmetto Breeze) respectfully requests **$507,051** for Fiscal Year 2026 in order to support the provision of public transportation throughout the Hilton Head Island/Lowcountry area.

The amount requested consists of a **$55,000** contribution toward the local match for the daily rural commuter program, **$20,000** toward extending the Breeze Trolley season, **$35,000** to cover the cost of Breeze Trolley passenger trips (i.e., estimated fares to be paid by the Town of Hilton Head Island so the service can remain fare-free) and **$397,051** to cover the local match needed to secure our 5307 FTA grant (earmarked for small urbanized area operations).

B. DESCRIPTION OF OPERATIONS:

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

Lowcountry RTA has been a rural (Section 5311) transportation provider since its inception in 1978. South Carolina Department of Transportation (SCDOT) administers the federal rural grant programs that, combined with fares and both state and local matching funds, account for the revenue necessary to operate the system.

Historically, the required local match has been provided by Allendale, Beaufort, Colleton, Hampton, and Jasper Counties, as well as the Town of Hilton Head Island. In February 2017, Lowcountry RTA was approved by the FTA as a direct recipient of urban (Section 5307) funds, designated to serve the Hilton Head Island/Bluffton Urbanized Area.

Lowcountry RTA is one of the 10 regional public transportation systems created under South Carolina state law and, at present day, is the designated public transportation provider for the five-county region that encompasses Allendale, Beaufort, Colleton, Hampton, and Jasper Counties. Our mission is “(to) provide regionally the safest, most innovative, cost efficient, multi-modal public transportation system possible” and it carries out this mission by providing a mixture of commuter bus services, local public transit in several of the region’s greater municipal areas (including Hilton Head Island, Beaufort, and Bluffton), and through some shuttle services and other operations. As a result, there is some level of public transit service available in all of the five counties in the LRTA region, with a primary focus on Beaufort County.

2. Describe in detail how the grant would be used? *(250 words or less)*

The most recent urban (Section 5307) grant project (for Federal Fiscal Year 2024) includes the continuation of the Breeze Trolley service on Hilton Head Island, operation of the Bluffton Breeze service, and facility improvements at our Benton Field Road campus, and it has a total project cost $2,874,069. The grant funding for this project consists of $1,206,375 in Federal funds and $74,552 in State Mass Transit Funds (SMTF). This leaves a total of $1,593,142 in local matching funds that must be raised for the project. After reducing this cost by fares received overall and local agreements/special trips, the local match cost is $1,178,894. Traditionally, these funds have been provided from the general funds of the Town of Bluffton, the Town of Hilton Head Island, and Beaufort County based on each jurisdiction's respective share of the total population of the urbanized area.

The most recent rural (Section 5311) grant project (for State Fiscal 2025) has a total project cost of $3,297,438. The grant funding for this project consists of $1,565,599 in Federal funds and $417,963 in SMTF. The remainder is covered by fares received and local match provided by our five counties.

When compared to the LRTA's FY25 request, there is a substantial increase in local match for all of LRTA's local-match partners due to rising insurance, operating, and maintenance costs, and a population base that is growing at a rate that is outpacing the rate at which our federal and state apportionments are made.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

If only partial funding is received, the LRTA would have to adjust service plans to reflect the adjusted budget allocations. These adjustments would primarily include reduced public transit services through a combination of reduced service hours, reduced frequency, or cancellation of service. Reductions would not affect the safety of any remaining operations, but they would likely have an adverse effect on the region's mobility and access to jobs (both of which are critical to our limited infrastructure and local economies), and in the case of the Breeze Trolley service, a degraded Island experience for visitors and residents alike.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

The most important public benefit is the enhanced access to jobs provided by LRTA's commuter services. With limited workforce housing, the Island's economy depends heavily on cost-effective, low-fare, daily commuter services for 100s of local employees to access jobs for our local employers. Additionally, the Breeze Trolley service enhances the Island Experience for visitors and provides congestion relief. The funds for the extension of the Trolley season will allow LRTA to provide a special Holiday Trolley service which will offer a safer alternative for residents and visitors to tour the Town's most notable holiday light displays and the tree-lighting ceremony.

5. Additional comments. *(250 words or less)*

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

Lowcountry RTA, like other public transit agencies across South Carolina receives most of its funding from a mixture of state and federal grants and annual discretionary allocations made by local governments. While the state and federal grants make up a majority of the funding stream, the local funding is imperative. It makes up what is referred to as “local match,” without which the agencies would not qualify for the grant funding.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

86	Government Sources	2	Private Contributions, Donations and Grants
1	Corporate Support, Sponsors	0	Membership, Dues, Subscriptions
11	Ticket Sales, or Sales and Services	0	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

LRTA has always been funded as described above, primarily by federal and state grants, with the required local match from local governments. In addition to governmental funding, Lowcountry RTA has sought to establish agreements whereby private businesses support the provision of public transit in their area. Several of these agreements are in place to support several of the Island's key employers. Our operations are also partially funded by fares paid by our commuter passengers.

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

In addition to governmental funding and agreements with private businesses described above, LRTA collects a nominal amount of revenue from advertising agreements (most of which is used to fund the production of maps, rider’s guides and other marketing materials).

D. FINANCIAL INFORMATION:

Fiscal Year Disclosure: Start Month: July   End Month: June

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   FY 2020 & FY 2021
   FY23 & FY24

3. The previous two years and current year **balance sheets**.

   A Current Balance Sheet has been attached to this Application.

   Balance Sheet Years Provided:

   FY 2020 & FY 2021

   FY23 & FY24

E. MEASURING EFFECTIVENESS:

1. List any award amounts received in fiscal year 2024 and/or 2025.

2021	$225,165.00	Palmetto Breeze
2022	$282,404.00	Palmetto Breeze

2023	$282,404.00	Palmetto Breeze
2024	$277,842.00	Palmetto Breeze
2025	$253,595.00	Palmetto Breeze Transit Services

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

Funds received in 2024 and currently receiving in 2025 were utilized asthe local match portion of our operating budgets for our Palmetto Breeze Transit daily commuter services and our seasonal Breeze Trolley services (which includes provision of required complementary ADA paratransit services through our Easy Breeze paratransit program).

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

The Town's contribution of our local match is critical to the success of our public transit services. Our funding through the State and Federal Departments of Transportation require the provision of a local match in order for those funds to be completely allocated to the LRTA. So, in short, without the Town's local match, the provision of these regionally significant services would not be possible.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

LRTA measures effectiveness in several ways. We assess our contribution to the local economy in terms of our ability to enhance access to jobs for commuters who reside outside the immediate area. We also monitor our commuter ridership as well as our Breeze Trolley ridership. Our internal key performance indicators include safety performance, passenger satisfaction, on-time performance, maintenance achievements, public support, social media impacts, and our overall image in the Hilton Head Island community and the surrounding Lowcountry communities.

F. EXECUTIVE SUMMARY

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

An Effectiveness Measurement spreadsheet has been attached to this application.

In FY2025, Palmetto Breeze provided its daily commuter service to and from Hilton Head Island, the seasonal Breeze Trolley service, the weekend Coligny Beach Parking Shuttle (from May to September), and a variety of special event transportation services. We estimate that the Town's FY25 $253,595 affiliated agency grant investment returned $1,267,975 (according to APTA-standard economic impact ratio of 5X) in economic benefits to the community. Additionally, the seasonal Breeze Trolley service provided significant congestion relief and enhanced the Island experience for tens of thousands of visitors and residents alike.

Summary of 2024 Breeze Trolley Season

Hilton Head Island's Breeze Trolleys delivered a total of approximately 35,303 passenger trips for the entire 2024 season, representing steady use of the trolley service year-over-year. Having an increase in ridership over 2023 is considered especially successful since we had 11 fewer operating days due to starting the season later than 2023, and missed two service days for severe weather. We estimate this equates to keeping approximately 13,000 cars off the Town's roadways during the peak season.

Additional 2024 Season highlights included:

- We adjusted our South Island Route to include a stop at Shelter Cover Harbour & Marina (trolley stop #2) in both the southbound and northbound directions to enhance passengers convenience and reduce ride times.
- The safety performance was once again outstanding.
- Our trolley maintenance team achieved a season that included 100% PM compliance and 100% vehicle availabilty for the two trolley routes.
- We increased our Facebook followers to 5,150, representing a 20% percent increase over 2023. Most of these followers (about 80%) continue to be from outside the HHI/Savannah area.
- Website traffic continues to be strong with expedient responses to all inquiries.
- Passenger reviews online and in person were consistently positive, especially concerning trolley operator courtesy, convenience, the free fares, and the new route changes.
- Improved vehicle tracking for passengers via the free CatchTheBreeze app.
- A total of 35,000 24-panel Rider's Guides were printed and distributed throughout the season. The Guides were made possible due to advertising support from a record 22 local businesses and organizations, mostly located along the trolley routes.
- Development and distribution of a Spanish version of the Breeze Trolley Map and times.
- 2024 promotions included several special ride-along events, adjustments for the July 4th fireworks in Shelter Cove, and the successful pilot test of a solar-powered trolley stop light to enhance safety and security.
- The last weekend of August (between the end of the high travel season and the Labor Day weekend) we again conducted a special promotion called "Breeze Trolley ROCKS! – A Ride and Find Adventure" involving painted rocks for passengers to find, re-hide and share on social media. This second annual event was very popular amongst our passengers and followers, and included prize packages with contributions from more than a dozen of our trolley partners. The result was a weekend of ridership on par with other similar summer weekends instead of experiencing a drop in ridership as the number of visitors riding trailed off.
- An additional 1,800 passengers were transported to support the Culture

HHI Lantern Parade activities in November.

Comparison of 2024 Ridership to Previous Seasons

Service Year	Notes	Total Passengers
2018	Inaugural year (July to Oct)	5,000
2019	First Full season (April to Sept)	18,000
2020	COVID-shortened (late Jun-Sept); fare-free	4,400
2021	Full season (April to Sept); fare-free; added Mid-Island Route	52,000
2022	Full season (April to Sept); fare-free; adjusted both the Mid-Island and South Island Routes	43,000
2023	Full season (April to Sept); fare-free	34,500
2024	Full season (April to Sept); fare-free	35,300

Expected Public Benefit

The most important benefit to the Town's citizens, visitors, and the community as a whole is the enhanced mobility and access to jobs provided by Palmetto Breeze's daily commuter services. With limited affordable workforce housing in the immediate area, the Island's economy depends heavily on cost-effective, low-fare, daily commuter services for employees to access jobs.

Additionally, the Breeze Trolley service has become an enhancement to the Island Experience for thousands of annual visitors, and is significantly contributing to reduced congestion on the Town's roadways.

If approved and funded, the special Holiday Season Trolley service will give back to the community in a whole new way, making free trolley service available for the first time in the off-season, and affording residents and visitors a “hands-free” alternative to taking in many of the Island’s most notable holiday light displays.

Signature: Kristine Hepburn

Title/Position: Director of Finance & Administration

Mailing Address: 25 Benton Field Rd., Bluffton, SC 29910

Email Address: khepburn@palmettobreezetransit.com

Phone Number: 843-757-5784

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Mitchelville Preservation Project

Project Name: Executive Director

Executive Summary

After three decades of attention, particularly the last 10 years of organized effort, the Mitchelville project's tipping point has been reached. The apparent consensus at the State, County, and Town level, as well as the public's outlook, is that HMFP will become a reality. We see HMFP not only as benefiting strategically from its historical uniqueness as the first town of self-governing formerly enslaved people, but also as having opportunities to create value from its continuing relevance as an exemplar of the importance of citizenship, helping to prepare citizens for 21st century America. Going forward, the managment agreement will take care of staff,and park improvements / maintenance as well as Park utiliities. The following assessment will highlight the work of the Executive Director and the organization from the previous year

Strategic Focus and Significant Achievements

1. On June 7, 2024, HMFP unveiled five "Ghosted Structures" that are aligned almost exactly as the historic homes would have been during the 1860's, 70's and 80's. The framework of the homes gives you an idea of the size and scale of the actual buildings and the doors and windows feature interpretive panels that provide insight into the lives of Mitchelville residents

#2. HMFP received $2.5 Million dollars from the Mellon Foundation and this funding supports the implementation of the Freedom Plaza in the Park, an Archaeological Research Facility and aspects of the Interpretative Trail. The Archaeological Research Facility and Auditorium (ARFA) will allow HMFP to process objects on site and conduct public events and educational programs on site. This project is in progress now and could open in early 2026.

#3. We moved into the fourth year of our "QR code stations" partnership with the Town of Hilton Head Island Office of Cultural Affairs. The three stations in the Park highlight the story of Mitchelville, a performance by Marlena Smalls and the Hallelujah Singers and an interpretation of Harriet Tubman by Cora Miller. The three stations have yielded 2,068 scans since January 2024 (over 9,700 total) with tourists ranging from 33 states. Some of the states not commonly recorded at Mitchelville programming include Arkansas, Colorado, Idaho, Illinois, Missouri, Montana, Oklahoma, Oregon, Texas, Washington and the commonwealth of Puerto Rico. In addition, the codes were scanned by tourists from Australia, Canada, Germany and Mexico

#4. HMFP is developing Augmented Reality for the Mitchelville story with the North Carolina State University school of Design and Technology. Boeing Global Engagement is funding this project, and the organization will field camps to train high school students on how to create AR in the future. The program will be housed at the upcoming ARFA building.

#5. Continuing to provide high level programming that attracts new visitors to the Hilton Head Island / Beaufort County area. The Holiday Nights and Lights boasted 3,000 people (a 6.6% increase from the previous year) over a three-day period with 1,800 tourists participating according to the donation cards passed out at the entrance and collected at the exit. The States represented in the data were: Florida, Georgia, Louisiana, Kentucky Mississippi, New York, New Jersey, North Carolina, Ohio, Pennsylvania and Tennessee. The Freedom Day program highlighting Aunt Pearlie Sue and the Gullah Kinfolk had 250 people in attendance. HMFP welcomed 1,530 people (an 8.5% increase from 2023) to the tenth annual Juneteenth celebration on June 15th and 2,305 people during the full week of Juneteenth events. The states represented during Juneteenth: Alabama, Florida, Georgia, Kentucky, Michigan, New York, New Jersey, North Carolina, Ohio, Pennsylvania, Tennessee and Virginia. The HMFP QR code stations yielded 2,068 scans with tourists ranging from over 33 states including: Arkansas, Colorado, Idaho, Illinois, Missouri, Montana, Oklahoma, Oregon, Texas, Washington and West Virginia. The Finding Freedom's Home exhibition at the Westin Resort and Spa reached 25,000 people during the period up to August 30, 2024.

#6. Important Archaeology research continues on the site and the organization is working to introduce a Youth Archaeology Camp as well as an Adult Archaeology Experience in 2025.

#7. HMFP received $922,000 from the State of South Carolina to fund the Interpretive Trail for the Park site. In 2024, the organization launched a national public art competition to solicit ideas for four statues / art installations that will be included along the Trail from the "observation deck" to the beachfront. Submissions are due in March 2025 and installation of the Trail and sculptures will take place later this year.

#8. HMFP is now at $9.5 million of its overall $22.8 million goal.

#9. HMFP completed its second official audit of the organization and received a clean, unmodified opinion.

#10. HMFP has started a definitive outreach program to bring educational programming to the Beaufort, Jasper and Hampton County area schools. This initiative is sponsored by The Palmetto Electric Trust and Boeing Global Engagement.

HMFP is working with the Association of African American Museums, the Southeastern Museums Conference and the Association for the Study of African American Life and History to promote the Park as construction begins in the Park. In addition, HMFP is working with the National Park Service Reconstruction Monument and the International African American Museum on program partnerships. HMFP enjoys meaningful relationships with the Smithsonian Institution, specifically, the National Museum of African American History and Culture and the National Museum of American History that will continue to lift the profile of our site. HMFP is engaged with the National Museum of American History to assist them in presenting an important exhibition on Gullah artifacts from the Lowcountry that will go on display at the facility in 2026.

Coupled with the promotion of the new Ghosted Structures in the Park, the overall profile of the organization continues to increase. Our metrics suggest that this will lead to more cultural heritage travelers attending the Juneteenth and other Mitchelville events next year. Survey / evaluation results from programming indicated that patrons noted the quality of the educational material and acknowledged the diverse audience demographics of HMFP events. In addition, Mitchelville events have become renowned for its highly diverse audiences, enriching the unification of the community at large. HMFP is distinguishing itself as the Cultural Heritage hub on Hilton Head Island and our programs are drawing expanded new audiences to the area.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/13/2025	Time Received: 05:22 PM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. **SUMMARY OF GRANT REQUEST:**

ORGANIZATION NAME: Mitchelville Preservation Project

Project/Event Name: Executive Director

Contact Name: Ahmad Ward — Title: Executive Director

Address: P O Box 21758, Hilton Head Island, SC 29925

Email Address: award@exploremitchelville.org — Contact Phone: 205-276-5376

Total Budget: $978,000.00 — **Grant Amount Requested:** $105,000.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

Affiliated Agency funds will be used to maintain the Historic Mitchelville Freedom Park (HMFP) site and support staff, operations and Park utilities. This historic site, drenched in Hilton Head's pristine island atmosphere, endeavors to be known as the Lowcountry key Heritage Tourism attraction. HMFP is in a pivot point in its development as exterior interpretive construction begins on the site this year. As the organization endeavors to complete its $22.8 Million fundraising goal, Affiliated Agency funds will help to undergird operational costs during this process.

B. **DESCRIPTION OF OPERATIONS:**

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

The Historic Mitchelville Freedom Park (HMFP) is a 501(c) non-profit organization whose mission is: to preserve, promote and honor Historic Mitchelville, the first self-governed town of formerly enslaved people in the United States. The brave men and women that built this community planted strong and enduring familial roots for generations of future African-Americans. HMFP educates the public on the compelling story of its inhabitants and their quest for education, self-reliance and inclusion as members of a free society. HMFP is thriving through feature exhibits, signature events and guided tours of Historic Mitchelville. In addition, it continues to enhance knowledge of Mitchelville through a series of learning opportunities including lectures, forums, and related cultural experiences. Thanks to the generosity of the Beaufort County Council, HMFP has completed its master plan for the Park, which serves as the blueprint for its transformation into a cultural attraction.

This expands the offerings of the Park to include replicas of the historic homes, churches, stores and other structures that align with the themes that govern the interpretation of the site. Those themes include: the importance of education, the desire for land ownership, laws and citizenship, the power of opportunity, everyday life before Reconstruction, and others. This historic site, drenched in Hilton Head's pristine island atmosphere, endeavors to be known as the Lowcountry's key Heritage Tourism attraction, inspiring visitors from around the world to travel to South Carolina to experience the people of the Mitchelville's first taste of freedom.

2. Describe in detail how the grant would be used? *(250 words or less)*

Creating a commemorative Park on a site where no visible elements of the town remain is a challenging and rewarding undertaking, but also unavoidably a capital-intensive endeavor. Execution of the entire Master Plan and Interpretive Plan is estimated at $22.8 million, of which 60% is for Master Plan implementation and contingency, 29% for interpretive design and elements, and 11% in assorted fees and archaeology costs. Affiliated Agency funds will allow HMFP to maintain the Park site and operations as the organization continues its captial campaign with the goal to raise $22.8 million. Funds will support staff such as the Executive Director, who has been instrumental in creating the Master Plan that governs implementation of the site, expanding the scope of the organization to a national level which has led to HMFP being reconized in renowned spaces such as **The New York Times**, **Travel + Leisure, Conde Nast Traveler, USA Today** magazine, exposure to national museum organizations and conferences and securing important funding from national foundations and organizations in order to

In addition, Affiliated Agency fund will also support maintainance of the Park site, so HMFP can continue to provide its important programming, such as the Juneteenth Celebration, Freedom Day, Blues and BBQ, the Griot's Corner literacy program and the Holiday Nights and Lights program which attracted **3000** people over three days last December.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

Partial funding would have a substantial impact on the functionality of operations as we move into a captial campaign to fully fund the Park site. HMFP would need to redirect funds to making sure certain activities would be able to happen, and make some determination on the viability of other programs and events.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

Because HMFP will have the uniqueness of a positive message of freedom and citizenship, it has the potential to become a major culture and heritage tourism draw in its own right. We foresee HMFP occupying a comfortable market niche and uniquely positioned to increase culture and heritage tourism in the local area. In the preliminary base case operating HMFP pro forma we anticipate **HMFP will contribute $1.1 million** initially to local nonprofit arts and cultural organization spending annually. In addition, HMFP will elevate the historic resonance of Hilton Head Island in ways that reach outside of the South Carolina area.

5. Additional comments. *(250 words or less)*

The current Board and leadership of HMFP are indebted to the former leaders, directors, and supporters of the Historic Mitchelville Freedom Park for their past efforts / continued support over the last decade. This has positioned HMFP to gain the momentum necessary to change the public mindset from "if" to "when" Mitchelville will be reborn as Historic Mitchelville Freedom Park.

Momentum behind the Park has been building rapidly recently for several reasons. Among them, HMFP has demonstrated effective stewardship of committed resources, prompting increasing levels of government commitment and support and public participation. Also, a strong Board, with appropriate structure and competencies, and key leadership are in place to undertake the next phase in Park development. Our strategy is to position HMFP to have both niche appeal and the potential ability to reach and attract a wider audience on the basis of its contemporary relevance to today's discussions of citizenship rights and responsibilities. We see HMFP not only benefiting strategically from its historical uniqueness as the first self-governed town of the formerly enslaved, but also as having opportunities to create value from its continuing relevance as an exemplar of the importance of citizenship, helping to prepare citizens for 21st century America.

By geographic location, time period of focus, and uniqueness of its self-governance by the formerly enslaved, HMFP will be a complementary resource and destination, especially for visitors to the recently opened.International African American Museum and/or the newly established Institute for the Study of the Reconstruction Era at USCB in Beaufort.

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

HMFP is currently funded through a Management Agreement with the Town of Hilton Head, ATAX funds from the Town of Hilton Head and Beaufort County, Foundation funding, public donations, Governmental grants, event admissions, Board pledges and individual gifts.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

38	Government Sources	36.3	Private Contributions, Donations and Grants
15.8	Corporate Support, Sponsors	3.5	Membership, Dues, Subscriptions
5.8	Ticket Sales, or Sales and Services	0.6	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

HMFP requested and was approved for $190,000 in Town of Hilton Head ATAX funds for 2025. The State of South Carolina approved $1 Million in 2024 for necessary archaeology and infrastructure for the Interpretive Center.

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

HMFP is engaging in the silent phase of a capital campaign. Bouyed by an influential, nearly $2 Million funding effort from the HMFP Board, individual donations, $575.000 from a Beaufort County resolution involving the completion of the Master Plan and funding from the State of South Carolina, pledges and received funds to this point, total $5 Million. HMFP requested and received $2,500,000 from the Mellon Foundation, to fund the implementation of site components consisting of the Freedom Plaza, The Classroom / Lab building, the Interpretative Trail and necessary infrastructure for the future Interpretive Center. This funding will be disbursed over a two year period. HMFP is targeting several high value individual donors and organizations across the nation.

D. **FINANCIAL INFORMATION:**

Fiscal Year Disclosure: Start Month: January End Month: December

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

A Current Profit & Loss Report has been attached to this Application.

Profit and Loss Years Provided:

2022
2023
2024

3. The previous two years and current year **balance sheets**.

A Current Balance Sheet has been attached to this Application.

Balance Sheet Years Provided:

2023

2024

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2021	$105,000.00	Executive Director
2022	$105,000.00	Executive Director
2023	$105,000.00	Executive Director
2024	$105,000.00	Executive Director

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

The Executive Director was able to: manage programming, events and interpretative elements that reached thousands of people across at least 37 states. The organization / Executive Director have memberships with The National Underground Railroad Network to Freedom, the Association of African American Museums, the Southeastern Museum Conference, the American Association of State and Local History and the Association for the Study of African American Life and History. HMFP raised $1.5 Million in Capital funds in 2024 and the organization has raised $9.5 Million in pledges / funding in hand toward the overall goal of $22.8 Million. The assets of the organization currently stand at the $3.4 Million level

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

HMFP events, such as the Juneteenth Celebration(1,530 participants in 2024) and Holiday Nights and Lights (3,000 participants in 2024) continue to reach beyond South Carolina to attract thousands of people from the country to HHI. Mitchelville's prominence in national conferences, programming, programs and publications; invitations to national grant opportunities and the growing scope of the organization places HMFP in position to draw even more people to HHI in 2025. HMFP continues to maintain a high percentage of tourists to the Park site with or without targeted programming. Through Park tours, programming, on site "QR code stations" and presentations, HMFP has spread its outreach across the country with tourists ranging from 38 states. Some of the states not commonly recorded at Mitchelville programming include Arkansas, Colorado, Idaho, Illinois, Missouri, Montana, Oklahoma, Oregon, Texas, Washington and the commonwealth of Puerto Rico.

HMFP opened its first exterior exhibition with the unveiling of the Ghosted Structures in June 2024. Currently, the orgainzation is working on a public arts competition and the resurfacing of the Interpretive Trail as well as conducting archaeological research for an upcoming Archaeological Research Facility.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

HMFP measures the effectiveness of programming by tracking the number of visitors, tourism trends and responses to each of the hosted exhibits, programs and events. The organization also takes note of how the messaging around branding reaches new audiences each year. Data is collected through online ticket sales, visitor surveys and on-site surveys at
signature events. HMFP also employs program / event specific evaluations, using both quantitative and qualitative data to measure effectiveness of our offerings. Regarding programs like the Roots of Reconstruction tour, we coordinate evaluation information with the Coastal Discovery Museum and the Hilton Head Land Trust. For Griot's Corner, the teachers are engaged before they leave the Park, to secure feedback about the story, activities and connection to literacy/reading standards. The majority of this year's data was compiled through online analytics on Facebook, the exploremitchelville.org website,
Instagram and YouTube. Staff efffectiveness is measured through employee evaluation processes that happen throughout the fiscal year.

F. **EXECUTIVE SUMMARY**

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

After three decades of attention, particularly the last 10 years of organized effort, the Mitchelville project's tipping point has been
reached. The apparent consensus at the State, County, and Town level, as well as the public's outlook, is that HMFP will become a reality. We see HMFP not only as benefiting strategically from its historical uniqueness as the first town of self-governing formerly enslaved people,
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HMFP is working with the Association of African American Museums, the Southeastern Museums Conference and the Association for the Study of African American Life and History to promote the Park as construction begins in the Park. In addition, HMFP is working with the National Park Service Reconstruction Monument and the International African American Museum on program partnerships. HMFP enjoys meaningful relationships with the Smithsonian Institution, specifically, the National Museum of African American History and Culture and the National Museum of American History that will continue to lift the profile of our site. HMFP is engaged with the National Museum of American History to assist them in presenting an important exhibition on Gullah artifacts from the Lowcountry that will go on display at the facility in 2026.

Coupled with the promotion of the new Ghosted Structures in the Park, the overall profile of the organization continues to increase. Our metrics suggest that this will lead to more cultural heritage travelers attending the Juneteenth and other Mitchelville events next year. Survey / evaluation results from programming indicated that patrons noted the quality of the educational material and acknowledged the diverse audience demographics of HMFP events. In addition, Mitchelville events have become renowned for its highly diverse audiences, enriching the unification of the community at large. HMFP is distinguishing itself as the Cultural Heritage hub on Hilton Head Island and our programs are drawing expanded new audiences to the area.

Signature: Ahmad Ward

Title/Position: Executive Director

Mailing Address: P.O. Box 21758, Hilton Head Island, SC 29925

Email Address: award@exploremitchelville.org

Phone Number: 843-255-7301

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Sandalwood Community Food Pantry

Project Name: Resilient Food Pantry

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 01/22/2025	Time Received: 12:22 PM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Sandalwood Community Food Pantry

Project/Event Name: Resilient Food Pantry

Contact Name: Nannette Pierson   Title: Executive Director

Address: P.O. Box 5061, Hilton Head Island, SC 29938

Email Address: nononannette@gmail.com   Contact Phone: 973-349-7970

Total Budget: $624,500.00   **Grant Amount Requested:** $97,500.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

The Resilient Food Pantry will: 1) keep Sandalwood clients safe and dry in all weather; 2) provide more hours and days of services for working clients; 3) deliver food to shut-in clients throughout the week; 4) be a community center that provides voter registration, vaccinations, cooking classes, etc. This project will occur in six Phases over 15 months at an estimated cost of $624,500. The requested $97,500 would be used for Phase 6: Surface Parking to build a 50-space, 16,250 sqft parking lot with driving aisles and maneuvering room using pervious materials and including site preperation, paving, signage, and markings.

B. **DESCRIPTION OF OPERATIONS:**

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

Sandalwood serves low-income clients whose family earns less than the poverty line defined by the United States Department of Agriculture (USDA) based on family size. Our food pantry serves largely three populations. One is the Gullah population that lives on the north end of Hilton Head Island. The two others are the Hispanic and immigrant populations, many of whom work in the hospitality industries (e.g. restaurants, hotels, landscaping, maid service, etc.) on Hilton Head Island. Sandalwood is open each Tuesday morning, and provides thousands of pounds of food to ~100 families serving over 400 low-income people each week.

Sandalwood takes advantage of all available free food sources and seeks grant funding from all appropriate philanthropic sources to purchase additional food. Our two main free food sources are: 1) Second Helpings, which gathers excess food that local supermarkets cannot sell due to overstocking or near expiration date. Second Helpings delivers over a thousand pounds of food to our food pantry each Tuesday morning; and 2) Lowcountry Food Bank, which is the distributor for the USDA that makes available excess government food.

Sandalwood, along with other non-profits serving the “working poor” on the island, is a key supportive partner with the Town of Hilton Head Island in accommodating the needs of the labor workforce that power the economy of our beautiful resort island. These low-income and sometimes immigrant laborers working in low-paying jobs without benefits depend on the food, hygiene supplies, clothing, etc. provided each week by Sandalwood to support their families.

2. Describe in detail how the grant would be used? *(250 words or less)*

The requested $97,500 grant will fund Phase 6: Surface Parking of the Resilient Food Pantry. Phase 6 , which will be of 3 months duration and begin 14 months after initiation of Phase 1, will develop a 50-space, 16,250 square foot parking lot. This parking lot will be paved with pervious gravel material costing about $7 per square foot. Hence, the total cost of Phase 6 is estimated to be $7/sqft x 16,250 sqft = $97,500. Included with the 50 parking spaces (best practice allocation of 325 sqft each) are driving aisles and maneuvering room.

The plan to accomplish Phase 6: Surface Parking includes:

- Site Preparation: The cost of removing existing structures and grading the site for drainage.

- Signage and Markings: The cost of installing signs and markings to guide drivers and pedestrians.

- Maintenance: The cost of resealing, repaving, additional gravel, and grading the parking lot over time.

- Permeable Pavers: Permeable pavers are porous, eco-friendly, and lightweight. They require less maintenance than asphalt or concrete. This solution has proven to be cost-effectie on similar projects.

Phase 6: Surface Parking will begin after the following Phases have been accomplished:

- Phase 1: Initial Site Assessment and Site Plan (4 months, $25,000)

- Phase 2: Building Design and Permitting Process (4 months, $40,000)

- Phase 3: Land Clearing and Site Development (2 months, $$112,00)

- Phase 4: Pantry Building Construction (2 months, $300,000)

- Phase 5: Landscaping and Site Beautification (2 months, $50,000)

Funds for Phase 6 will be required 14 months after project initiation in late calendar year 2026.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

No building plan changes will be made due to partial funding..

Phase 6:Surface Parking is an essential element of the building of the Resilient Food Pantry since it is required by law that our building have sufficient parking for our clients. If the full $97,500 grant for Phase 6: Surface Parking is not received, Sandalwood will have to increase its bank loan amount. The total estimated cost of Phase 1 through Phase 5 is $527,000. Since Church Mouse has provided a $100,000 grant, Sandalwood's requested bank loan amount would be $427,000 plus the deficit due to partial funding.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

Sandalwood serves a population is largely made up of native Gullah descendants or recent immigrants, who typically work in the hospitality industries (e.g. restaurants, hotels, maid service, landscapers, etc.). These jobs are low-paying and often do not include benefits. Our clients typically live in mobile homes on the north end of the island away from the manicured gated communities. Our clients often live from paycheck to paycheck, and are greatly affected by economic downturns and weather events. Our clients are thrilled with the prospect of having a permanent food pantry site that will also serve as a community gathering location.

5. Additional comments. *(250 words or less)*

The economy of Hilton Head Island is tourist based, and depends on having world-class hotels, restaurants, and resort options. The town also depends on the plantations and other resident and tourist housing options having manicured landscapes that attract new residents and appeal to tourists. All of these hospitality industries depend on our community's Gullah, Hispanic, and immigrant populations to provide the workforce required to power Hilton Head Island's economy. Yet this indispensable workforce has little to no voice in the housing and budget decisions made by the Town Council of Hilton Head Island. Without a unified voice, the Gullah, Hispanic, and immigrant populations will not be able to affect their social, economic, and political conditions as required to build pathways to self-sufficiency.

As stated earlier, the greatest impact of the Resilient Pantry on our low-income, minority, and immigrant (often non-English speaking) clients is the affirmation that our community sees them and cares about their well-being. This project has been made possible by many local agencies working together, including the Town of Hilton Head leasing the land at $1/year, the Community Foundation of the Lowcountry (CFL) providing several Impact Grants, the Savannah College of Art and Design (SCAD) developing the design concepts for the Resilient Food Pantry buildings, the Institute for Business and Home Safety (IBHS) determining the most cost-effective building design and materials, and many local businesses and agencies contributing to our Resilient Food Pantry Building Fund over the past 16 years since the Sandalwood Community Food Pantry opened in 2009.

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

In 2024, Sandalwood Revenue of $265,000 consisted of:

- Grants: $35,000

- Restricted Grants: $85,000

- Heritage Classic: $5,000

- Events: $10,000

- Corporate Contributions: $30,000

- Individual Contributions: $100,000

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

	Government Sources	83	Private Contributions, Donations and Grants
13	Corporate Support, Sponsors		Membership, Dues, Subscriptions
	Ticket Sales, or Sales and Services	4	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

Sandalwood has sought a $157,000 Impact Grant from the Community Foundation of the Lowcountry to fund Phase 1 through Phase 3 of the Resilient Food Pantry. This requested $157,000 Impact Grant was deemed worthy by the Community Foundation of the Lowcountry in 2024 but not funded because the land lease from the town of Hilton Head Island of 15 years plus two five-year option was considered too speculative to invest considerable funds. Sandalwood is working with the Town to extend the lease duration.

Sandalwood has received a $100,000 grant from Church Mouse for the Resilient Food Pantry. If the Impact Grant is not received in time, Sandalwood will use the Church Mouse grant to initiate Phase 1 through Phase 3.

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

Sandalwood has sought a $157,000 Impact Grant from the Community Foundation of the Lowcountry to fund Phase 1 through Phase 3 of the Resilient Food Pantry. This requested $157,000 Impact Grant was deemed worthy by the Community Foundation of the Lowcountry in 2024 but not funded because the land lease from the town of Hilton Head Island of 15 years plus two five-year option was considered too speculative to invest considerable funds. Sandalwood is working with the Town to extend the lease duration.

Sandalwood has received a $100,000 grant from Church Mouse for the Resilient Food Pantry. If the Impact Grant is not received in time, Sandalwood will use the Church Mouse grant to initiate Phase 1 through Phase 3.

D. **FINANCIAL INFORMATION:**

Fiscal Year Disclosure: Start Month: January End Month: December

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   2022
   2023
   2024
   2025

3. The previous two years and current year **balance sheets**.

   A Current Balance Sheet has been attached to this Application.

   Balance Sheet Years Provided:

2022

2023

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2024	$100,000.00	Church Mouse Grant
2024	$45,000.00	Resilient Food Pantry

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

It is expected that the $100,000 Church Mouse grant will be used for site preparation during the initial three Phases of the Resilient Food Pantry (Phase1: Initial Site Assessment and Site Plan, Phase 2: Building Design and Permiting Process, and Phase 3: Land Clearing and Site Development).

Note: The usage of these Church Mouse funds could change depending on whether Sandalwood receives the requested $157,000 Impact Grant from the Community Foundation of the Lowcountry, and the timing of the release of grant funds. If the Impact Grant funds are received and are released in time to fund the initial three Phases of the Resilent Food Pantry, the Chruch Mouse grant will be applied to Phase 4: Pantry Building Construction.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

The Sandalwood Resilient Food Pantry will be a permanent home, a safe space where we can successfully continue what we started 15 years ago in 2009 here on Hilton Head Island at the Sandalwood Terrace Apartments. At Sandwood, we live out our mission to go to the people, live among them, learn from them, and love them.

Over the past 16 years, Sandalwood has never missed a week providing food to the underserved living and working on Hilton Head Island. But our Food Pantry has had to move our location six times. These moves, while exhausting, were necessary to increase our programs in order to address the growing number of families facing food insecurity. While the past accomplishments of Sandalwood in addressing food insecurity on Hilton Head Island have truly been amazing, the time has come for our Food Pantry to take the next logical step to successfully address the growing number of Hilton Head Island families, largely from the Gullah community, Hispanic and white hospitality workers, and the immigrant population, who face food insecurity on a daily basis. Like other Food Pantries on Hilton Head Island, Sandalwood needs a secure building where we can house a permanent Food Pantry site.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

The Sandalwood Community Food Pantry measures the effectiveness of our activities and programs based on their impact on our beloved clients that we have served so joyously each Tuesday morning since 2009. The Sandalwood Community Food Pantry has the tremendous advantage of knowing our clients intimately. We interact on a personal level with many of our clients four times or more each month. While we have had formal surveys of our clients to determine what are their needs and how the Food Pantry can serve them better, the large majority of our client feedback comes from their comments, usually positive but sometimes challenging, during the several times per month we serve them. The benefit of being good friends with our clients is that we get very honest positive feedback on our current activities and programs when they like something we provide and very direct criticism when they are not happy with something at the Food Pantry. As implied in our agency title, the Sandalwood Community Food Pantry is a wonderful, encouraging community of clients and volunteers that treat each other like their own family, which includes honest communication, difficult truth at times, and always compassionate behavior.

F. **EXECUTIVE SUMMARY**

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

An Effectiveness Measurement spreadsheet has been attached to this application.

Signature: Nannette

Title/Position: Pierson

Mailing Address: P.O. Box 5061, Hilton Head Island, SC 29938

Email Address: nononannette@gmail.com

Phone Number: 973-349-7970

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: Sea Turtle Patrol Hilton Head Island

Project Name: Town Affiliated

Executive Summary

Executive Summary

The mission of Sea Turtle Patrol Hilton Head Island (STPHHI) is to provide monitoring and support on Hilton Head Island beaches for sea turtle nesting and hatching activity annually. These programs, along with spreading awareness through public education and outreach, are essential to promote the continued existence of these endangered species. The organization became a 501c3 nonprofit in 2018 which allowed for tax deductible donations to be accepted to fund operations on the beach. While enhancing the program technologically and logistically, sea turtle nesting density and interest from residents and visitors have been consistently trending upward. More exposure through social media and expanded programing enhanced with ATAX grant awards for marketing have accellerated the visibility of STPHHI in the community and beyond. The work load has increased substantially and the expenses continue to increase as we improve our presence on the beach. The funding provided through the Town Affiliated program has allowed for more involvement and attention to community initiatives and collaborations. The STPHHI director salary still reflects a part time offering- However, the inaugural FY2024.2025 Town Affiliated financial assistance to include 70% of this offering allowed for operational funding to be redirected, securing both essential equipment upgrades and a secure salary to include tax adjustments, additional insurance for operations, and many other necessities that were lacking.

Before the reorganization of Sea Turtle Patrol HHI in 2017, information on sea turtles and public knowledge of the role of sea turtle patrol was guarded. Sea turtle nesting is unique to destinations on the SE Coast that provide a suitable habitat for these endangered reptiles to nest. Through the participation of Sea Turtle Patrol HHI with the Town of Hilton Head, beach renourishment projects have been federally permitted and have preserved sea turtle nesting habitat on 14 miles of main beach, Mitchellville beach, Hickory Forest, and Pine Island beaches on Hilton Head Island. STPHHI is the only organization permitted by the State of SC to monitor Hilton Head Beaches for sea turtle nesting and hatching activity, through a permit from SCDNR held by Executive Director, Amber Kuehn.

STPHHI has implemented free public turtle talks during the nesting season, educational programs in the schools and resorts, and has participated in community initiatives while maintaining the most technologically advanced program on SC state beaches. Stranding of federally protected sea turtles and marine mammals are also handled through STPHHI. STPHHI continues to strive for funding from local organizational grants. Although ATAX grants and restricted donations have given STPHHI an elevated marketing platform, the operational budget is inadequate for our intended level of service. With the help of the Town, STPHHI hopes to sustain a well-rounded program, housed in a more substantial facility. With the future addition of a facility for a base of operations and to welcome the community, the program will move to the next level of service benefitting economic and natural resouces on Hilton Head Island.

“As STPHHI continues to promote awareness and attention to activities on the beaches of Hilton Head, the theme RESILIENCE AND RESTORATION has been chosen for the 2025 nesting season. We will assist the town during a massive beach reconstruction as the permitted sea turtle protection entity required for this activity.”- Amber Kuehn

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/14/2025	Time Received: 01:56 PM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. **SUMMARY OF GRANT REQUEST:**

ORGANIZATION NAME: Sea Turtle Patrol Hilton Head Island	
Project/Event Name: Town Affiliated	
Contact Name: Amber Kuehn	Title: Director
Address: 31 Alljoy Road, Bluffton, SC 29910	
Email Address: SeaTurtlePatrolHHI@gmail.com	Contact Phone: 843-338-2716
Total Budget: $270,000.00	**Grant Amount Requested:** $97,500.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

STPHHI serves the Town of HHI annually with an advanced sea turtle nest monitoring program necessary for beach renourishment permitting (Town Affiliated Agency since 2024). This FY2025.2026 grant would be allocated for assistance with the Executive Director salary (70%) and the part-time Administrative Consultant stipend (70%) or $47,000 to offset operational expenses. An annual storage unit fee ($5,500) is included in the critical facitlity management request.. Additionally, funding is requested ($45,000) to provide an annual lease (not a tent in a parking lot) or temporary/mobile facility cost that is not reflected in the current total budget.

B. **DESCRIPTION OF OPERATIONS:**

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

Sea Turtle Patrol HHI is a nonprofit that financially supports sea turtle nest monitoring and stranding on 20 miles of beaches on HHI (14miles Ocean facing, 4miles Mitchelville/Hickory Forest, 2miles DolphinHead/Pine Island). STPHHI was re-organized in 2017 without the financial support of the Town. In 2024, Sea Turtle Patrol HHI was granted Town Affiliate status. In recent years, ATAX funding has assisted with marketing for sea turtle conservation awareness. STPHHI relies solely on unrestricted donations from the community for operational expenses. As the organization becomes more visible and continues to advance technologically and logistically to keep up with increased nesting density, visibility, and tourism, an operations facility will be essential. Although donations remain consistent, they do not accomodate for this level of growth. The next chapter for this program necessitates a working facility that gives the community and visitors an outlet to experience the work that is done on the beach through preservation, research, and outreach. STPHHI is a critical part of HHI Beach Management and a requirement for permitting in preparation for beach renourishment. In addition, included in the Town of HHI Strategic Plan: Environmental Sustainability is a goal to "Establish National Leadership Credibility in Environmental Sustainability and Resource Protection". STPHHI and the protection of endangered sea turtles nesting on HHI beaches is a significant highlight for this designation.

2. Describe in detail how the grant would be used? *(250 words or less)*

The grant will be designated for partial salaries (70%) to offset operational expenses. There are currently two stipends drawing from the STPHHI operations budget, the Executive Director annual salary

($50,000) and the part time administrative consultant annual stipend ($17,000) or $47,000 requested. Additionally, as STPHHI grows out of the tent and mandatory relocation from Islanders to the USCB parking lot has been established as a temporary site with limited access to the building, we request that financial assistance for the current storage unit- $5,500/yr and a contribution toward facility accomodations be met -$45,000. As the renourishment project begins, STPHHI monitors will be spending several hours in vehicles, sharing staging areas with contractors before returning to the tent. That said, we are outgrowing a 4 door pick up truck parked in a tent and require a base of operations so that this program may become permanently established. STPHHI has taken all suggested measures and has approached the town for a town property while other nonaffiliated nonprofits have been granted this privelege already. Future programming struggles to move forward without a space- Rental or Town provided. These plans include bringing the massive Aquarium tank out of storage to contain a washback loggerhead hatchling and local benthic marine organisms for educational viewing purposes, displaying manatee and dolphin skeletal rearticulations from those stranded and collected on HHI beache, and providing educational programs encouraging good stewardship of our beaches. Incorporating the operational facility, and offices will make the organization accessible to the community.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

If partial funding is received, STPHHI will continue to operate a comprehensive nest monitoring program, but will need to find a managable compromise to keep up with the popularity of the organization. The STPHHI Director holds a state permit for beach monitoring operations on HHI which is manageable, but the increased programming with public participation that the organization has implemented would be ancillary. Future exhibits will remain in storage. Without office space/adequate base of operations, STPHHI will need to reduce plans for future commmunity engagement, focusing on preparing for renourishment mitigation and increased nesting density in 2026.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

STPHHI, in keeping with a 5YR Strategic Plan: 2024-2028, would like to provide a beach operations/marine life science center for public education and engagement at a permanent location. Members and stakeholders surveyed in 2024, indicated an overwhelming need for STPHHI to inhabit an operational facility. STPHHI endeavors to incorporate a hospitality component into this future facility to accomodate community/schools and visitor education. Highlighting the efforts that the Town is putting toward sustainability, preserving nature, and protecting sensative/endangered marinelife, is in keeping with the current municipal strategic plan. Furthermore, beach preservation is in the top 15 goals of that plan.

5. Additional comments. *(250 words or less)*

Sea Turtle Patrol HHI has grown exponentially since 2017. In order to maintain this level of outreach, full time attention has been given to the operation that exists outside of daily beach monitoring requirements. Social media has been a significant outlet for engaging the public and providing visibility for the program. Through ATAX funding, STPHHI has exhausted these avenues. Enthusiam for
environmental preservation is paramount and eager members of the community need a place to learn more about the activities conducted in the marine environment that surrounds our island. A tangible offering that allows STPHHI to engage the public off the beach is the essential component for moving to the next level. Permits to have a loggerhead hatchling in captivity for 1 year intervals, to implement a sea turtle triage, and to display federally protected animal remains for education litterally require a structure(walls) to display them. As programming

becomes integrated with current Chamber of Commerce programming, USCB research collaborations, Educational programming in the schools, etc. STPHHI is becoming a recognizable asset in the community beyond nest monitoring. Additional costs, such as annual $30,000 DNA analysis fees, make it difficult for STPHHI to sustain a budget to include a facility without the help of the municipality. Hilton Head Island boasts a very high level of regard for marine resources, culturally and economically. The facility that STPHHI is suggesting will enhance that focus.

C. **FUNDING:**

1. Please describe how the organization is currently funded. *(100 words or less)*

   Currently, STPHHI has a marketing budget provided by HHI ATAX grants ($70,000 in 2025). This provides for informational videos, digital marketing services, printed materials, etc. Operational expenses are met by local fundraising through individual donations. Organizational grants through funds of The Community Foundation of the Lowcountry and other local nonprofits on the island meet the need for special projects. STPHHI strives to apply for all funding available, meeting the parameters of restricted and unrestricted donations.

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

42.43%	Government Sources	43.58%	Private Contributions, Donations and Grants
7.2%	Corporate Support, Sponsors	0	Membership, Dues, Subscriptions
0	Ticket Sales, or Sales and Services	6.2%	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

The HHI ATAX award for FY 2025 (January 1 - December 31) was in the amount of $70,000. This is the 4th grant through ATAX.

The First Town Affiliated Grant was awarded to STPHHI FY2024.2025 in the amount of $73,480

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

As a Town Affiliated Agency, STPHHI is requesting financial assistance to offset operational expenses designated for partial salaries and an operational facility provisions. Salaries are included in the STPHHI operational budget and draw from individual unrestricted donations. There is currently inadequate funding for a facility. Grants from local organizations typically cannot be used for salaries/operations, only for specific projects. A Church Mouse Ministries grant allowed STPHHI to replace the cover of the tent to make it presentable in the USCB HHI parking lot. STPHHI needs the support of theTown of HHI to inhabit an operational space to perform required beach monitoring and to embody the emphasis given to marinelife preservation with public engagement. Sea turtle monitoring

D. FINANCIAL INFORMATION:

Fiscal Year Disclosure: Start Month: July End Month: June

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   2022.2023
   2021.2022
   2023.2024

3. The previous two years and current year **balance sheets**.

   A Current Balance Sheet has been attached to this Application.

   Balance Sheet Years Provided:

   2022.2023

   2023.2024

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2025	$73,480.00	Town Affiliated Agency

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

   The Affilliated Agency funding in 2024.2025 was used to offset operational expense by providing 70% of one salary and one stipend. Additionally, the remaining funds subsidized a vehicle that will be used during the beach renourishment and subsequently on the beach for sea turtle patrol. *STPHHI is the only organization on the island that is permitted to monitor and collect sea turtle nest monitoring data that is required for beach renourishment permitting.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

Financial pressure for the operations budget was relieved with the Town Affiliated grant and STPHHI had the confidence to dedicate more time/funding toward initiatives for collaboration/community outreach and to further future plans for the organization, ultimately benefitting the island overall with a proposed marinelife/beach operations center. A Sea Turtle Patrol Auxiliary was formed to provide volunteers for community events that requested STPHHI participation, a formal curriculum was created for the STEM initiative in public schools on HHI, the formation of a Lowcountry Environmental Club (LEC) co-op was organized by the Director of STPHHI through the HHI Rotary Club resulting in collaboration with other environmental nonprofits on the island for initiatives to reduce single use plastic waste on the island (a Town priority), the Chamber of Commerce initiative, Fill it Forward was launched by STPHHI at the SE Regional Sea Turtle Network Conference with inspiration from the Rotary LEC Quench Buggy. In summary, the financial assistance from Town Affiliated Agency funding has opened doors that have allowed for the time and energy put forth for conservation of our natural resources to flow into so many different community initiatives implementing sea turtle conservation as a conduit for change.

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

Operational costs are essential for STPHHI to perform at a level that is in keeping with the image that HHI strives to impart through the beach renourishment requirement for annual monitoring in the permitting process along with the Chamber of Commerce draw for ecotourism to the island . Chamber of Commerce website monitoring finds that interest in the environment, and more specicfically, sea turtles is paramount. Community initiatives offer residents and visitors a chance to participate in the formation of robust environmental protections. STPHHI serves the community by preserving sea turtle nests on the beach and taking time to explain permitted activities that are observed daily on 14 miles of highly trafficed sand. A QR code on the patrol vehicle and estimated interactions are well over 100/day. A public turtle talk is offered weekly for visitors/residents where attendance/zip codes are collected to gauge effective reach. Social media analytics track interest from followers. The effectiveness and visibility of STPHHI programing is evident in action and in data collection.

F. EXECUTIVE SUMMARY

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

Executive Summary

The mission of Sea Turtle Patrol Hilton Head Island (STPHHI) is to provide monitoring and support on Hilton Head Island beaches for sea turtle nesting and hatching activity annually. These programs, along with spreading awareness through public education and outreach, are essential to promote the continued existence of these endangered species. The organization became a 501c3 nonprofit in 2018 which allowed for tax deductible donations to be accepted to fund operations on the beach. While enhancing the program technologically and logistically, sea turtle nesting density and interest from residents and visitors have been consistently trending upward.

More exposure through social media and expanded programing enhanced with ATAX grant awards for marketing have accellerated the visibility of STPHHI in the community and beyond. The work load has increased substantially and the expenses continue to increase as we improve our presence on the beach. The funding provided through the Town Affiliated program has allowed for more involvement and attention to community initiatives and collaborations. The STPHHI director salary still reflects a part time offering- However, the inaugural FY2024.2025 Town Affiliated financial assistance to include 70% of this offering allowed for operational funding to be redirected, securing both essential equipment upgrades and a secure salary to include tax adjustments, additional insurance for operations, and many other necessities that were lacking.

Before the reorganization of Sea Turtle Patrol HHI in 2017, information on sea turtles and public knowledge of the role of sea turtle patrol was guarded. Sea turtle nesting is unique to destinations on the SE Coast that provide a suitable habitat for these endangered reptiles to nest. Through the participation of Sea Turtle Patrol HHI with the Town of Hilton Head, beach renourishment projects have been federally permitted and have preserved sea turtle nesting habitat on 14 miles of main beach, Mitchellville beach, Hickory Forest, and Pine Island beaches on Hilton Head Island. STPHHI is the only organization permitted by the State of SC to monitor Hilton Head Beaches for sea turtle nesting and hatching activity, through a permit from SCDNR held by Executive Director, Amber Kuehn.

STPHHI has implemented free public turtle talks during the nesting season, educational programs in the schools and resorts, and has participated in community initiatives while maintaining the most technologically advanced program on SC state beaches. Stranding of federally protected sea turtles and marine mammals are also handled through STPHHI. STPHHI continues to strive for funding from local organizational grants. Although ATAX grants and restricted donations have given STPHHI an elevated marketing platform, the operational budget is inadequate for our intended level of service. With the help of the Town, STPHHI hopes to sustain a well-rounded program, housed in a more substantial facility. With the future addition of a facility for a base of operations and to welcome the community, the program will move to the next level of service benefitting economic and natural resouces on Hilton Head Island.

“As STPHHI continues to promote awareness and attention to activities on the beaches of Hilton Head, the theme RESILIENCE AND RESTORATION has been chosen for the 2025 nesting season. We will assist the town during a massive beach reconstruction as the permitted sea turtle protection entity required for this activity."- Amber Kuehn

Signature: Amber Kuehn

Title/Position: Director

Mailing Address: 31 Alljoy Road, Bluffton, SC 29910

Email Address: SeaTurtlePatrolHHI@gmail.com

Phone Number: 843-338-2716

Fiscal Year 2026
Affiliated Agency Grant Application

Organization Name: The Children's Center

Project Name: Affordable Childcare Builds a Vibrant Economy

Executive Summary

An Effectiveness Measurement spreadsheet has been attached to this application.

See Attached.

Fiscal Year 2026
Affiliated Agency Grant Application

Date Received: 02/05/2025	Time Received: 02:43 PM	By: Online Submittal

Applications will not be accepted if submitted after 4 pm on February 14, 2025

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: The Children's Center

Project/Event Name: Affordable Childcare Builds a Vibrant Economy

Contact Name: Jody L Levitt   Title: Executive Director

Address: PO Box 21240 | 8 Nature's Way, Hilton Head Island, SC 29925

Email Address: jody.levitt@thechildrenscenterssc.org   Contact Phone: 843-681-2739

Total Budget: $1,950,101.00   **Grant Amount Requested:** $80,000.00

Provide a brief summary on the intended use of the grant and how the money would be used. *(100 words or less)*

High-quality childcare has a profound impact on the local community in several ways. An Affiliated Agency grant would provide critical support for The Children's Center's operational expenses, ensuring continued access to high-quality early childhood education. True affordability in childcare is not feasible if parents bear 100% of the costs. Instead, affordability requires a balanced approach that combines parent tuition with funding from both public and private sources. By bridging the gap between actual costs and what families can reasonably afford, this grant will help sustain quality care while enabling parents to remain active and productive contributors to our local economy.

B. **DESCRIPTION OF OPERATIONS:**

1. For state reporting purposes, give a brief description of the organization. *(250 words or less)*

The Children’s Center, Inc. is a unique nonprofit organization dedicated to providing working families with affordable, high-quality early childhood education and childcare services. Since 1967, our mission has been to ensure that all children, regardless of financial background, have access to a strong educational foundation. Thanks to the dedication of our staff, board, and community supporters, we continue to fulfill this mission year after year.

The Center was established when local leaders recognized the need for safe, nurturing, and affordable childcare for working parents on Hilton Head Island. What began as a program serving 15 children has now grown to support approximately 110 children daily, with many more on a waitlist. Our multicultural, bilingual program operates five days a week, year-round, from 6:30 a.m. to 6:00 p.m., providing a structured learning environment that fosters physical, social, emotional, cognitive, linguistic, and creative development. To ensure accessibility, we offer a sliding scale tuition program based on household income and family size. The Children's Center also participates in the ABC Quality and Scholarship program.

Our success is measured through South Carolina Early Learning Standards, which help track each child's developmental progress from as early as six weeks old. Over the past three years, our graduating students have mastered over 90% of the key skills needed for a smooth transition into kindergarten—demonstrating the lasting impact of high-quality early education.

2. Describe in detail how the grant would be used? *(250 words or less)*

Childcare costs can be a significant barrier to workforce participation. According to *The State*, the **cost of one year of infant care in South Carolina is comparable to tuition at some public colleges**. The *Greenville Journal* further highlights this crisis, estimating a **$1.4 billion annual economic impact** on the state. As Bob Morgan, former President and CEO of the South Carolina Chamber of Commerce, stated, *"Businesses all over our state are talking about the lack of high-quality, affordable childcare being one of the leading workforce barriers."*

This grant will help ensure that The Children's Center remains affordable for local families, bridging the gap between parent tuition and the actual cost of care. As one of only two providers on Hilton Head Island serving children as young as six weeks, The Children's Center plays a crucial role in supporting working parents. Without access to infant care, many new mothers are unable to return to work, further straining the local labor market.

A Town Affiliated grant will enable The Children's Center to continue providing infant and toddler programs for at least 25 families this year. The true cost of infant care is approximately $600 per week, yet the maximum a parent pays at our Center is $221—a gap that must be covered through grants, special events, and individual donations.

By investing in early childhood education, you are not only supporting local families but also strengthening the local workforce and economy.

3. What impact would partial funding have on the activities, if full funding were not received? What would the organization change to account for partial funding? *(100 words or less)*

Partial funding allows The Children's Center to sustain current programming while seeking additional partners to close the funding gap. Regardless of support level, we remain committed to providing high-quality, affordable early education and care for local families. Full funding would move us beyond operating paycheck to paycheck, much like the families we serve. It would empower our leadership to focus on staff development, long-term sustainability, classroom quality, and staff recruitment and retention—ensuring a stronger foundation for the children, families, and workforce of Hilton Head Island. Every contribution makes a lasting impact.

4. What is the expected public benefit to these expenditures to the Island's, citizens, visitors, and/or the Town? *(100 words or less)*

In December 2023, the Hilton Head Island-Bluffton-Beaufort mean annual wage was $45,042, yet affordable childcare—defined as 7% of income—should cost $3,153 per year. However, the actual cost of care is three to four times higher. The Children's Center is the only provider offering a sliding scale, ensuring families can afford care. In communities like ours, where childcare shortages impact economic vitality, investing in high-quality care helps address workforce gaps, support businesses, and strengthen long-term community resilience.

Investing in early childhood education leads to higher high school graduation rates and better career opportunities later in life, reduces crime and improves public health.

5. Additional comments. *(250 words or less)*

A February 2023 ReadyNation study found that insufficient infant-toddler childcare costs the U.S. $122 billion annually in lost earnings, productivity, and revenue—more than double the impact since 2018. Nearly half of parents have reduced work hours due to childcare issues, 26% have quit, and 23% have been fired.

For 57 years, The Children's Center has provided affordable, high-quality early education to working families in the Lowcountry, ensuring children enter kindergarten ready to succeed. Our graduates master over 90% of key kindergarten readiness skills, compared to 36% of children in Beaufort County entering ready.

Infant and toddler care is essential for a thriving community, enabling parents to participate in the workforce while ensuring children receive the early education and nurturing they need for healthy development. High-quality care fosters cognitive, social, and emotional growth, laying the foundation for lifelong success. Without affordable childcare, parents—especially mothers—struggle to remain employed, impacting local businesses and the economy. A strong childcare system supports workforce stability, attracts and retains talent, and strengthens community resilience. Investing in early childhood care benefits families today while building a stronger, more prosperous future for the entire community.

Helping TCC thrive helps HHI thrive.

C. FUNDING:

1. Please describe how the organization is currently funded. *(100 words or less)*

The funding streams for The Children's Center are diverse, ensuring sustainability year over year.

Tuition revenue comes in two areas: Tuition paid by parents (31%), tution from State of SC programs (22%)

Food Program Reimbursements from SC Child and Adult Care Food program is 5%

Fundraising activities covers 40% (Grants - 39%, Special Events - 32%, Individuals - 19%, Other - 10%

2. Please also estimate, as a percentage, the source of the organization's total annual funding.

27	Government Sources	30	Private Contributions, Donations and Grants
7	Corporate Support, Sponsors		Membership, Dues, Subscriptions

5	Ticket Sales, or Sales and Services	31	Other

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026. *(100 words or less)*

The Department of Social Services has provided grant funding to childcare organizations at random times, mostly from federal COVID revenue. These funds have totaled $897,714 since 2020. It is our understanding that this funding source will not continue. We participate in the Child and Adult Care Food Program in order to provide healthy breakfast, lunch and snacks to all our children daily. We receive ABC Scholarship funds for income qualified families who attend our Center. We are a 4K provider. The Children's Center applies for an annual grant from Beaufort County Human services to support parent engagement and teacher training.

4. Please provide a summary of other sources of funding or secured for this initiative. *(250 words or less)*

The Children’s Center’s diversified funding strategy ensures we maintain high-quality programs for all ages. Tuition accounts for 50% of our annual revenue, with the rest coming from fundraising activities. We receive support from 25 grant providers and host three major events each year, including a dinner auction, golf tournament, and peer-to-peer giving program. Additionally, we participate in Champions fore Charity and Birdies for Charity through the Heritage Classic Foundation. Local community organizations like Rotary, Kiwanis, and Zonta also contribute. Our partnership with local businesses further enhances our fundraising efforts.

Infant and toddler care is funded from all these sources, but specifically through grant applications and special events. As we have just begun a new fiscal year, much of the funding is in progress, special events are schedule for later in the year and grant applications have varying deadlines.

D. **FINANCIAL INFORMATION:**

Fiscal Year Disclosure: Start Month: January 1 End Month: December 31

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.

   An Organization Budget has been attached to this Application.

2. The previous two years and current year **profit and loss reports** for the organization.

   A Current Profit & Loss Report has been attached to this Application.

   Profit and Loss Years Provided:

   2022-23

3. The previous two years and current year **balance sheets**.

   A Current Balance Sheet has been attached to this Application.

   Balance Sheet Years Provided:

   2022-23

E. **MEASURING EFFECTIVENESS:**

1. List any award amounts received in fiscal year 2024 and/or 2025.

2. How were those funds used? To what extent were the objectives achieved? *(200 words or less)*

No awards were received in previous years 2024 or 2025.

3. What impact did this have on the success of the organization and how did it benefit the community? *(200 words or less)*

N/A

4. How does the organization measure the effectiveness of both the overall activity and of individual programs? *(200 words or less)*

Utilizing South Carolina's Early Learning Standards as a basis for all programming ensures a high level of educational experiences for all enrollees, from birth to age eight. Combining curriculum with a tracking tool developed in partnership with USCB's Computer Science Department, each child's progress is evaluated quarterly; it is then reported to parents two times each year. Parents are encouraged to participate in their child's educational development at home. A parent resource library is available to parents to help equip them with information they need to engage and enhance their child's development. PreK graduates from The Children's Center show mastery in over 90% of kindergarten readiness skills. Our programs bring together a diverse representation of children and families, who work together to achieve success during the most critical period of brain development, birth to age five.

Specifically, we will look at three objective measurements for effectiveness:

Outcome #1: Maintain an infant and toddler program to ensure not less than seventeen children are able to receive care at The Children's Center from age 6 weeks through one year, keeping tuition costs affordable.

Outcome #2: Provide appropriate data to parents each quarter regarding their child's development along that child's individual continuum. Ensure we maintain monthly communication that provides resources to help parents at home.

Outcome #3: Build staffing levels to grow the enrollment availability by at least two times its current capacity. (Long-term)

F. EXECUTIVE SUMMARY

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. *(1300 words or less)*

An Effectiveness Measurement spreadsheet has been attached to this application.

See Attached.

Signature: Jody L Levitt

Title/Position: Executive Director

Mailing Address: PO Box 21240, Hilton Head Island, SC 29925

Email Address: jody.levitt@thechildrenscentersc.org

Phone Number: 843-681-2739

TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA

Fiscal Year 2026 Affiliated Agencies Grant Application

All applications must be fully completed and submitted electronically to the Town of Hilton Head Island <u>no later than 4:00 p.m. on Friday, February 14, 2025.</u>

This application package includes the following:

1. Guideline for Applications
2. Affiliated Agency Funds Application
3. Application Submission

Applications will first be reviewed by Town Staff and Senior Staff. The Finance & Administrative Committee will then review the applications and will select agencies to make presentations outlining their funding request and answer any questions. Those selected will be notified by email (please make sure to provide a valid email address) of the day and time scheduled for its presentation. The Finance & Administrative Committee will, after its review, submit a recommendation on affiliated agency funding requests to Town Council as part of the annual fiscal year budget and adoption process.

The Committee requests each applicant adhere strictly to the guidelines and requirements provided herein.

Failure to correctly complete the application in its entirety <u>may disqualify what may be an otherwise qualifying application.</u>

GUIDELINES FOR APPLICATIONS FOR AFFILIATED AGENCIES FUNDS

NOTES REGARDING THE APPLICATION

The purpose of this program is to provide a transparent process to consider grant requests using public funds and to document the proposed public benefit of each funding request. It is the intention of this program to make limited grants to agencies and non-profit organizations providing services for public benefit that are not tourism related. Tourism grants and support is provided through ATAX grants administered by the Town ATAX committee. Affiliated Agency grants will be recommended by the Town Finance & Administrative Committee to Town Council annually. It is not the intention of this type of grant to be recurring. "Out of cycle" or "emergency" grant applications are discouraged.

Applications will be reviewed using the following criteria to determine if it serves a public purpose:

1. **Is there a goal or benefit to the public by virtue of the project?**
2. **Will public or private parties be the primary beneficiary?**
3. **How speculative in nature is the project?**
4. **On balance, what is the probability that the public interest will ultimately be served and to what degree?**

1. **Summary of Requesting Agency**

   a. Describe the organization, its mission and background

   b. Provide the full name, postal mailing address, email address and telephone number of a primary contact person, given the authority and responsibility to represent the application before the Committee, must be included in this section.

   c. List the organization's current annual budget and the requested grant amount.

2. **Description of Operations**

   a. Describe the organization purpose/uses of requested funding and demonstrate how funding will provide public benefit.

   b. The description must state what is intended to be accomplished by the Affiliated Agency grant funds, and the source and amount of other funds to be committed to the project.

   c. Describe the impact to the organization should it not be fully funded for the fiscal year 2026 grant request.

   d. What are the future capital projects or changes in the service delivery scope that might impact future operations or financial requests?

3. **Funding**

   a. Provide a brief description on how the organization is currently funded.

   b. Provide a summary of current and previous governmental funding applied for, and/or received, for the prior two fiscal years and current.

4. **Financials**

    a. Provide copies of the prior two fiscal years audited financial statements

    b. Provide a copy of the current budget detailing all anticipated revenues and expenses.

5. **Measuring Effectiveness:**

    a. Please identify the project/operating objectives and budget

    b. Please identify how operational metrics will be tracked to demonstrate goal achievement.

    c. Please identify how the metrics accrue to a public benefit

    d. Please identify your service area and provide statistics of clients served

    e. Please identify any partner agencies

    f. Please identify a proposed/expected timeline to achieve objectives

    g. Please identity any partners/contractor comments

    h. Please identify any other sources of funding requested or received.

6. **Submission Requirements:**

    a. All funding requests are to be submitted electronically by Friday, February 14, 2025, via the Town's online Affiliated Agency Grant Application.

FY 2026
AFFILIATED AGENCY GRANT APPLICATION

For Office Use Only	Time Received:	By:
Date Received:		

Applications will not be accepted if submitted after 4:00 P.M. on February 14, 2025

A. Summary of Grant Request:

ORGANIZATION NAME: ______________________________

Contact Name: ______________________ Title: ______________________

Address: ______________________________

Email Address: ______________________ Contact Phone: ______________________

Total Budget: ______________________ **Grant Amount Requested:** ______________________

Provide a brief summary of the intended use of the grant and how the funding would be used.
(100 words or less)

B. DESCRIPTION OF OPERATIONS:

1. **For reporting purposes, give a brief description of the organization.** **(250 words or less)**

Rev. 11/2023

2. **Describe in detail how the grant would be used.** **(250 words or less)**

3. **What impact would partial funding have on the activities if full funding were not received? What would the organization change to account for partial funding?** **(100 words or less)**

4. **What is the expected public benefit to these expenditures to the Island's citizens, visitors, and/or the Town?** **(100 words or less)**

5. **Additional comments** **(250 words or less)**

FUNDING:

1. **Please describe how the organization is currently funded.** **(100 words or less)**

2. **Please also estimate, as a percentage, the source of the organization's total annual funding.**

__________ Government Sources

__________ Private Contributions, Donations & Grants

__________ Corporate Support, Sponsors

__________ Membership Dues, Subscriptions

__________ Ticket Sales, or Sales & Services

__________ Other

3. **Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2025 and fiscal year 2026.** **(100 words or less)**

4. **Please provide a summary of other sources of funding sought or secured for this initiative.** **(250 words or less)**

D. FINANCIAL INFORMATION:

Fiscal year disclosure: Start Month: ________________ End Month: ________________

Financial Statement Requirements:

1. The upcoming year's **operating budget** for the organization.
2. The previous two years and current year **profit and loss reports** for the organization.
3. The previous two years and current year **balance sheets**.

E. MEASURING EFFECTIVENESS:

1. **List any award amounts received in fiscal year 2024 and/or 2025? How were those funds used? To what extent were your objectives achieved? (200 words or less)**

2. **What impact does this have on the success of the organization and how did it benefit the community? (200 words or less)**

3. **How does the organization measure the effectiveness of both the overall activity and of individual programs? (200 words or less)**

G. Executive Summary:

Provide an executive summary using the Effectiveness Measurement spreadsheet provided or your own format. If creating your own format, please refer to the Effectiveness Measurement sample spreadsheet and use the criteria as a guideline. (1300 words or less)

AFFILIATED AGENCIES GRANT APPLICATION
TOWN OF HILTON HEAD ISLAND, SOUTH CAROLINA

APPLICATION FINAL CHECKLIST

(Complete and return this list with the application)

- ❑ The application is being filed by the **February 14, 2025, 4:00 PM** deadline.
- ❑ We have reviewed and followed the application guidelines.
- ❑ We have supplied the requested Financial Data.
- ❑ We will be prepared to make a verbal presentation to the Committee and answer questions when we are scheduled to do so.

Please contact Michele Bunce at 843-341-4689

or email

micheleb@hiltonheadislandsc.gov

if you have any questions or concerns.