



## **Town of Hilton Head Island**

### **Finance and Administrative Committee Meeting**

**Tuesday, February 13, 2024, 10:00 AM**  
**1 Town Center Court, Hilton Head Island, SC**  
**Benjamin M. Racusin Council Chambers**

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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 January 11, 2024
- 4. Appearance by Citizens:** Citizens who wish to speak on the matters being discussed during the meeting may do so by submitting the [Request to Speak form](#) no later than 4:30 PM the day prior to the meeting.
- 5. Presentations and Recognitions**
  - a. Presentation and Overview of the Upcoming FY24-25 Destination Marketing Plan and DMO Budget Creation, Review Process, and Timeline - Angie Stone, Assistant Town Manager, Community Engagement
- 6. New Business**
  - a. Review and Discussion of the Town of Hilton Head Island's Affiliated Agency Funding Request Applications for Fiscal Year 2025 - Jeff Herriman, Interim Finance Director
- 7. Adjournment**

FOIA Compliance: Public notification of this meeting has been published, posted, and distributed in compliance with the South Carolina Freedom of Information Act and the requirements of the Town of Hilton Head Island.

In accordance with the requirements of Title II of the Americans with Disabilities Act of

1990 ("ADA"), the Town of Hilton Head Island will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. Auditory accommodations are available. Any person requiring further accommodation should contact the Town of Hilton Head Island ADA Coordinator as soon as possible but no later than 48 hours before the scheduled event.

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 ADMINISTRATION COMMITTEE MEETING Thursday, January 11, 2024, 2:00 PM Minutes

## Call to Order

Chair Alex Brown called the meeting to order at 2:00 p.m.

## Adoption of the Agenda

**David Ames moved to approve the agenda as presented. Steve Alfred seconded. Motion carried 4-0.**

## Approval of the Minutes

**David Ames moved to approve the regular meeting minutes of December 19, 2023 as presented. Steve Alfred seconded. Motion carried 4-0.**

## Appearance by Citizens:

Lee Lucier addressed the Committee regarding his approval and support of the memorandum of understanding (MOU) with the Coastal Community Development Corporation (CCDC) and Habitat for Humanity. He noted that both will support our community's inventory of workforce housing solutions.

John Smarzley addressed the Committee regarding that the MOU for the CCDC should have had approval from Town Council's Housing Action Committee for procedural process and governmental transparency. He asked that the Committee deny the MOU for CCDC and send it back to the Housing Action Committee.

Lynn Bullard addressed the Committee regarding the number of workers that come across the bridge to work on the Island every day. She said that the CCDC was an experimental measure, not feasible or financially responsible to solve housing for the large number of people that cross the bridge everyday.

Charles Conrad addressed the Committee regarding his opinion that the government should not be involved in deciding through AMI (area median income) who should or should not be allowed to live on Hilton Head Island. The CCDC could become an administrative burden for the taxpayers.

Ashley Phillips addressed the Committee regarding voting no to the CCDC MOU. She indicated this is not a one-time request for money. She asked for alternative transportation options for those coming on and off the Island.

## Presentations and Recognitions

Town of Hilton Head Island Fiscal Year 2024 Year to Date Update - Jeff Herriman, Interim Director of Finance

Jeff Herriman, Interim Finance Director, addressed the committee regarding an update on the Fiscal Year 2024. He started with his presentation speaking about the key issues, including revenue collections, expenditures, and general fund revenues. Mr. Herriman continued by answering questions from the last Finance & Administration meeting. He noted the previous question asking for specifics on the information that is provided to the Town regarding details with the local accommodations tax collected. The hotel and property management companies provide the gross revenue, not the details regarding the number of tourists and room rates. Mr. Herriman will reach out to the DMO (Destination Marketing Organization) to find this information. Another question was regarding the Town Council expenditures and why the increase from 2023 to 2024. This is due to legal fees incurred because of the number of legal actions and the Town's staff attorney position. The Town is utilizing two law firms until that position is filled. Mr. Herriman also commented on the investment summary through the end of November 30, 2024. He continued with details regarding the Town's investments with the Local Government Investment Group and Wells Fargo Security.

Chair Brown asked if there were any public comments on this presentation. Having no additional questions from the public or from the Committee, Chair Brown thanked Mr. Herriman for his work.

## Unfinished Business

Consideration of Approval of a Sponsorship Agreement with the Heritage Classic Foundation for the RBC Golf Tournament - Josh Gruber, Deputy Town Manager

Josh Gruber, Deputy Town Manager, addressed the Committee regarding the approval of the sponsorship agreement with the Heritage Classic Foundation for the RBC Golf Tournament. Mr. Gruber indicated that materials are in the packet regarding this item. He spoke about this being a continuing discussion from previous Finance & Administration meetings regarding the request from the Heritage Classic Foundation. The request is for an increase in the Town's sponsorship amount based on the RBC Golf Tournament being upgraded to a Signature Event. Mr. Gruber introduced Steve Wilmot, President of the Heritage Classic Foundation.

Steve Wilmot addressed the Committee, thanking the Town and community for their continued support for this event. Mr. Wilmot indicated that since 1999, the Heritage has partnered with University of South Carolina Beaufort and Clemson University to complete an economic impact study on the Town's support for the RBC Heritage. The study has shown an excess of \$1.2 million to this community. In addition to the economic impact, there are an additional 1,500 jobs supported. Mr. Wilmot went on to describe the difference between a Signature Event and a PGA Event. As a Signature Event, we are recognized as a step down from a Major Event, due to a limited field; however, we are guaranteed to have the best players in the world play. Mr. Wilmot indicated that the title sponsors and the partnerships are different this year. Everyone, including the RBC, other partners, and sponsors, have been asked to help elevate the experience and tournament itself. He further indicated that the Heritage would be willing to help the Town have additional opportunities to work with the networks and the media in crafting the message going out to the public. There is added value to the community when the tv cameras are showing what the Town has to offer. Mr. Wilmot also addressed that there are many local businesses utilized during the tournament, bringing the whole community together.

The Committee asked questions and made comments regarding characterizing the economic impact of



the tournament on the Town's finances; what is the difference between a Signature Event compared to a regular PGA Event; what are the percentage increases that the Heritage has requested from other sponsors, with the exception of RBC; television exposure is not guaranteed by the networks; concerns over the percentage level increase requested; the pride felt to our community by having the tournament on the Island; the publicity the Town receives driving interest for others to visit the Island, the event supporting tourism; providing an opportunity to the Town to enhance the communication of our brand; the marketing conversation with the DMO to control and expand our message; local business involvement including minority and disadvantaged business owners; encouraging the funds be used locally; and a request to provide a list of local vendors that are utilized during the tournament.

Chair Brown asked if there were any public comments on this item. Seeing no comments from the public, the Chair brought the matter back to the dais. The Committee members discussed the funding amount requested by the Heritage.

**David Ames moved to forward the recommendation from staff to Town Council for consideration to approve a sponsorship agreement with the Heritage Classic Foundation for the RBC Golf Tournament with the support of \$400,000. Steve Alfred seconded the motion. The motion carried 4-0.**

Consideration of a Resolution Authorizing a Memorandum of Understanding with the Coastal Community Development Corporation - Josh Gruber, Deputy Town Manager

Josh Gruber, Deputy Town Manager, addressed the Committee regarding the approval of the consideration of the resolution authorizing a memorandum of understanding (MOU) with the Coastal Community Development Corporation (CCDC.) Mr. Gruber began with the history for the request when the Town was contacted by the CCDC, requesting funds in the amount of \$600,000 to be used to pursue acquisition of existing condominium units located on Hilton Head Island. The CCDC would record restrictive covenants on the purchased units, including the limit on the area median income (AMI) requirements that could be applied to any future rental property. The CCDC would also oversee the qualifications, selection of individuals as well as the maintenance and occupancy of these units. Details were outlined during the presentation to this Committee on August 15, 2023. Following the December 19, 2023 meeting, there were a number of amendments that this Committee requested be made to the MOU. Mr. Gruber went on to explain details of the intended use of the funds being requested. He continued to outline the updates to this version from the first draft, including that the CCDC will prepare a funding use plan detailing with specificity how the requested funding will be utilized along with a corresponding budget being requested through the Town's Affiliated Agency process. There was further discussion about how Beaufort County calculates the AMI and the need to identify specific language going forward.

Mr. Gruber continued to outline the next steps, including policy questions to the Committee, and adopting the MOU as amended to form a final draft that can be transmitted to Town Council for consideration. The Committee would also need to determine the critical path for consideration. If the Committee recommends providing funding, this recommendation can either be incorporated into a FY24 Budget Amendment and adopted; or it can be included as part of the upcoming FY25 Affiliated Agency funding cycle. Mr. Gruber explained that the packet provided the timeline and details for each option. The final question to the Committee is to determine the amount of funding, if any, that it will recommend to Town Council for its consideration.

Alan Wolf, Coastal Community Development Corporation (CCDC) Chairman of the Board addressed the Committee regarding questions and concerns. Mr. Wolf began with the question regarding preferences identifying applicants for housing. He clarified that there was no preference ever intended, unless there

was an affiliate that brought equity to the transaction through the purchase of a unit. The details include if a business entity was to provide 20% of the down payment on two units, they would receive a preference on one unit. The idea is to solve the housing issues by a one-to-one ratio with regard to the business and the public. A donation from a business would also qualify within the same model. This modification will be documented in the MOU.

Mr. Gruber noted that the Town's Housing Action Committee had a meeting in November 2023. They had an opportunity to look at both proposals and voted to support both proposals. The Town Attorney, Curtis Coltrane, clarified the 99-year covenant with the property could be written to run with the title of the property. It can be written so that it does not evaporate on a sale and runs with the title of the property.

The Committee asked questions and made comments regarding any ramifications between FY24 and FY25 budget amendment; details of potential private donations with housing preference; details regarding the draw-down division of the \$600,000 provided by the Town; if an applicant were to change jobs and work off Hilton Head Island; the limitation of a one-year lease with annual recertification; and the possibility of a sale of an existing property within the CCDC.

Chair Brown asked if there were any public comments on this agenda item.

Angie Hutchins addressed the Committee regarding the number of questions and issues on the choice of applicants receiving a rental unit. She also noted this is untested and unproven in our community. Having tax dollars at stake, with the different municipalities, she questioned what would happen if there was a disagreement.

Larry Landry addressed the Committee regarding putting this on the critical path timeline. Workforce housing has been addressed since 2015 and it is time to move this forward. This is a proven model in other communities with a strong MOU and checks and balances in place.

John Smarzley addressed the Committee regarding that the Town should receive a housing preference with the amount of money being provided through the MOU. He also noted the Housing Action Committee did not see these modifications being presented at this meeting. The process of using the Housing Action Committee was set up by Town Council should be followed moving forward.

Xiaodan Li addressed the Committee regarding the Town providing equity but no ownership. She questioned how the CCDC will manage the properties; what happens if the CCDC does not exist; if the Town is liable for these properties; who is chosen to rent these units; and the ramification of taking affordable housing out of the market for use by the CCDC.

Kaitlyn Lee addressed the Committee regarding her support for this MOU. She noted this is a creative solution and has already put people into homes. She noted the nature of a rental market with the uncertainty of potential properties sold and no longer unaffordable or rentable.

Paul Sherran addressed the Committee regarding his current problem with managing multi-residential properties. He addressed the administrative concern and lack of control of the units on a daily basis.

Matt Sweeney addressed the Committee regarding consideration of those negatively impacted by the additional properties being purchased and used by the CCDC. Government subsidized housing benefits only a few with what measurable benefits to the taxpayers. He questioned if it is prudent for government to use taxpayer monies.

John Casey addressed the Committee regarding the large number of unanswered questions, specifically the proposed AMI. He noted inconsistencies, with a private developer coming before Council with a solution to affordable housing onto a preexisting building and property. He continued with details and additional questions regarding the difference to the present and use of taxpayer money.

Alan Wolf addressed the Committee regarding the requirement of AMI, stating preference can be enacted by the Town. He further explained the AMI and promissory notes. He noted Town staff has researched other communities utilizing the CCDC model. He stated this is not the Town owning and managing the rental units. There would be no risk to the Town.

Kenneth Campbell addressed the Committee regarding as one of the board members of CCDC. He spoke about Town Council having adopted the 4 Pillar Plan. The plan invited residents to help, with little reaction from the community. He concluded with program details including the critical path forward for the FY24.

Chair Brown brought the matter back to the dais for discussion. Josh Gruber outlined the two items that would be proposed in the draft MOU. He provided additional clarity to the Committee.

**David Ames moved to forward the recommendation from staff to Town Council for consideration of the resolution authorizing a memorandum of understanding with the Coastal Community Development Corporation with the following three amendments to the memorandum of understanding: language clarifying that their qualifications and eligibility determinations will be done on an annual reoccurring basis; clarifying that funding will be provided on a draw-down basis, not up front; and that the selection of occupants for those units would be based on funding contributions and individuals identified by the Town on a one-to-one basis. Glenn Stanford seconded the motion. The motion carried 4-0.**

**Glenn Stanford made a motion to move this recommendation to be included in the current fiscal year 2024. Steve Alfred seconded the motion. The motion carried 4-0.**

Consideration of Resolution Authorizing a Memorandum of Understanding with Habitat for Humanity to Support Workforce Housing - Josh Gruber, Deputy Town Manager

Brenda Dooley, Chief Executive Officer of Habitat for Humanity, was invited to speak to the Committee. Ms. Dooley's presentation included the four components of the Habitat Homeownership Program, including the volunteers, donors, families, and land purchased. She specifically noted the types of families that are part of the Habitat program and how they impact our community. She also noted the 2023 Year in Review, showing that their model is effective and works within the community.

Ms. Dooley continued to address the items that were noted at the December Finance & Administration meeting. The application process would specifically note clarity on a number of items, including those working on Hilton Head Island be identified; that Habitat retains first right of refusal on homes sold; and that these homes will not become short term rentals. There was further discussion to create multi-family units, such as townhouses, which could fit within the zoning density.

Josh Gruber addressed the committee regarding the consideration of a resolution authorizing a memorandum of understanding (MOU) with Habitat for Humanity to support workforce housing. He provided a quick history and background. He continued that in FY24, the Hilton Head Regional Habitat for Humanity applied to receive funding as an affiliated agency. As part of the process, Council did not recommend the funding at the time of the application received or as part of the FY2024 budget adoption. However, on May 19, 2023, Act 57 of 2023 was adopted by the South Carolina General Assembly. Shortly after this, staff was asked to create a draft MOU associated with providing Habitat with funding to create affordable workforce housing. Last month, at the December 19, 2023 meeting, the Finance & Administrative Committee reviewed an initial draft MOU with Habitat and provided comments and feedback. Mr. Gruber continued to describe the details for intended use of funds. The Town will continue to work directly with Habitat, including Habitat's submittal for all conceptual, design, engineering and site plans for the Town's review and approval. Additional details of the MOU were noted in Mr. Gruber's presentation with the additions that were requested at the December 19, 2023 meeting.

The Committee asked questions and made comments regarding site plan and number of units on a piece of property is critically important; the emphasis should be on multi-family, not single-family units; draw down provisions; if the funds be used for purchase of the land that has already been identified; the active role with the Town going forward; the previous Habitat project on the 14 acres off Marshland Road and current owners of those homes; if a Town employee has ever applied for a Habitat house; and details on the first and second mortgages on the Habitat homes.

Chair Brown asked if there were any public comments on this agenda item.

Jeb Bush, Development Director of Habitat for Humanity, addressed the Committee regarding his time on the committee. He noted that once Habitat purchases the land, they will find the funds to build the houses. He went on to ask the Committee to vote to move this forward.

Xiaodan Li addressed the Committee regarding the definition of AMI the definition of income distribution being used by the Committee. She noted that the taxpayers will be negatively impacted living on Hilton Head Island.

Tom DeMint addressed the Committee regarding his time on the Habitat board. He has seen the pride and sense of community that is provided to those recipients and their family. Habitat promotes a more stable, and reliable workforce.

Charles Conrad addressed the Committee regarding the requested money is for an altruistic feeling, and for a tax benefit. He questioned what jobs would be impactful to the community and deserve this taxpayer money. He would like a private sector solution to workforce housing.

Melinda Tunner addressed the Committee regarding the affiliated agency approval process. She referred to the CCDC looking for funding through the affiliated agency funding program. She noted that the CCDC does not have two years of financial results and therefore, they do not fit the affiliated agency model.

Paul Kale addressed the Committee regarding his time with Habitat and First Presbyterian Church. He spoke about a family that had a positive impact within the Habitat program. He stated that Habitat provides the needed workforce housing options within our community.

Ayaks Castellanos addressed the Committee regarding his time with Habitat. He was one of the recipients of one of the houses built off Marshland Road. He spoke about the positive impact that this has brought to himself and his family. He is also on the Housing Action Committee and committed to being part of the solution.

Angie Hutchins addressed the Committee regarding Habitat's 50-year track record, having been around long enough to vet out questions and issues. Habitat has a goal of homeownership, allowing the ability to sell and build the recipients legacy and overall quality of life going forward. She applauded this issue for the Town to support.

Lynn Bullard addressed the Committee regarding the differences between Habitat and the CCDC. She said that Habitat has a proven model to help the community. CCDC is experimental and unknown. She said that she is for Habitat.

Chair Brown brought the matter back to the dais for discussion.

**David Ames moved to forward the recommendation from staff to Town Council for consideration of the resolution authorizing a memorandum of understanding with Habitat for Humanity to support workforce housing. Steve Alfred seconded the motion. The motion carried 4-0.**

**David Ames made a motion to move this recommendation to be included in the current fiscal year 2024. Steve Alfred seconded the motion. The motion carried 4-0.**

### New Business

#### Consideration of a Fiscal Year 2024 Affiliated Agency Funding Application by the Coastal Community Development Corporation - Josh Gruber, Deputy Town Manager

Josh Gruber, Deputy Town Manager, addressed the Committee regarding the consideration of a FY2024 Affiliated Agency Funding application by the Coastal Community Development Corporation (CCDC.) The CCDC has requested a total amount of \$600,000 as part of a total project budget of \$3 million. Additional information was provided to the Committee outlining how that money will be used. Mr. Gruber indicated that the financial statements, as of November 2023, are being prepared for the Committee.

The Committee asked questions and made comments regarding the financial numbers listed on the application; as well as discussing the amount of money requested by the CCDC.

Chair Brown asked if there were any public comments on this agenda item. With no additional comments, the Chair brought the matter back to the dais.

**David Ames moved to forward the recommendation from staff to Town Council for consideration of a Fiscal Year 2024 Affiliated Agency Funding Application by the Coastal Community Development Corporation. Steve Alfred seconded the motion. The motion carried 4-0.**

#### Consideration of a Fiscal Year 2024 Affiliated Agency Funding Application by the Hilton Head Regional Habitat for Humanity - Josh Gruber, Deputy Town Manager

Josh Gruber, Deputy Town Manager, addressed the Committee regarding the consideration of a FY2024 affiliated agency funding application by the Hilton Head Regional Habitat for Humanity. Habitat has requested a total amount of \$300,000 as part of a total project budget of \$3 million. There was additional information provided to the Committee outlining how that money will be used, including Habitat's financial statements, provided as part of their FY24 application.

The Committee asked questions and made comments regarding strong support for this application.

Chair Brown asked if there were any public comments on this agenda item. With no additional comments, the Chair brought the matter back to the dais.

**David Ames moved to forward the recommendation from staff to Town Council for consideration of the resolution authorizing a memorandum of understanding with Habitat for Humanity to support workforce housing with full funding. Steve Alfred seconded the motion. The motion carried 4-0.**

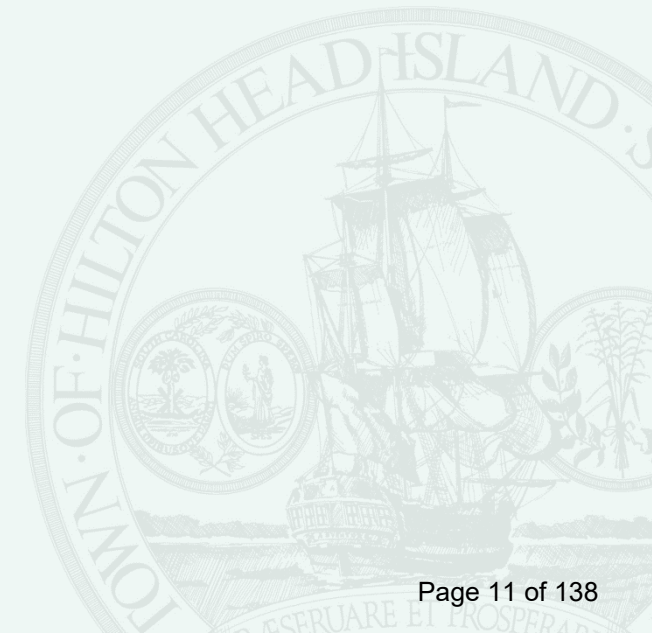
#### Adjournment

The meeting was adjourned at 4:38 p.m.

The recording of this Meeting can be found on the Town's website at [www.hiltonheadislandsc.gov](http://www.hiltonheadislandsc.gov)

# FY24-25 Destination Marketing Plan and DMO Budget Review Timeline

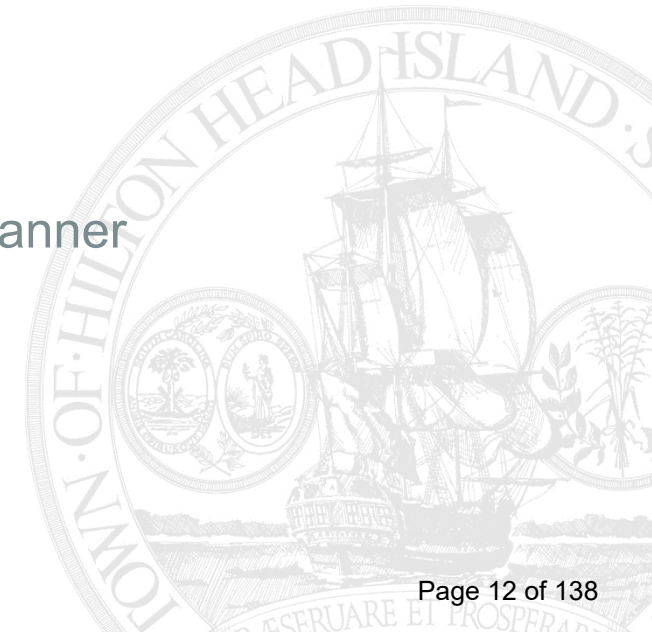
Finance & Administrative Committee  
February 13, 2024



# Agenda

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- Background
  - Destination Marketing Organization Contract
  - Contract requirements
- FY24-25 Destination Marketing Plan and DMO Budget Timeline
  - Key dates and steps in the creation, review and approval process
- Destination Marketing Organization Reporting Requirements
  - Audit
  - Activities/production
- Results of Collaboration on the Hilton Head Island 2024 Official Vacation Planner

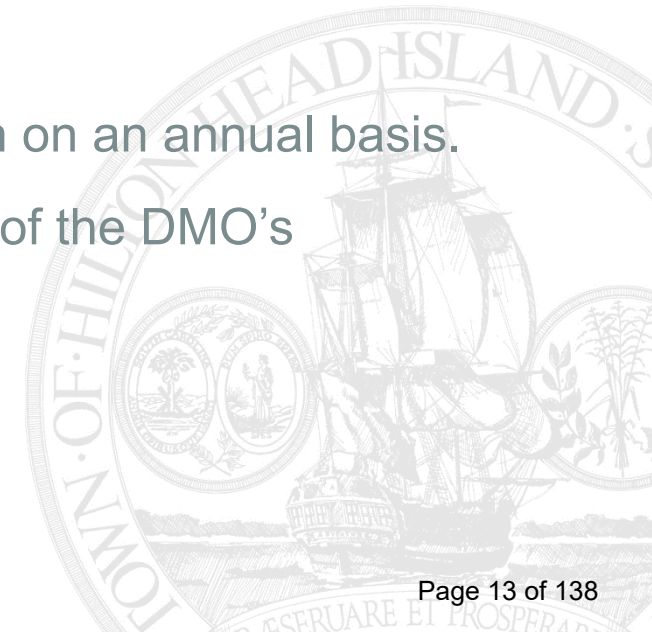




# Background

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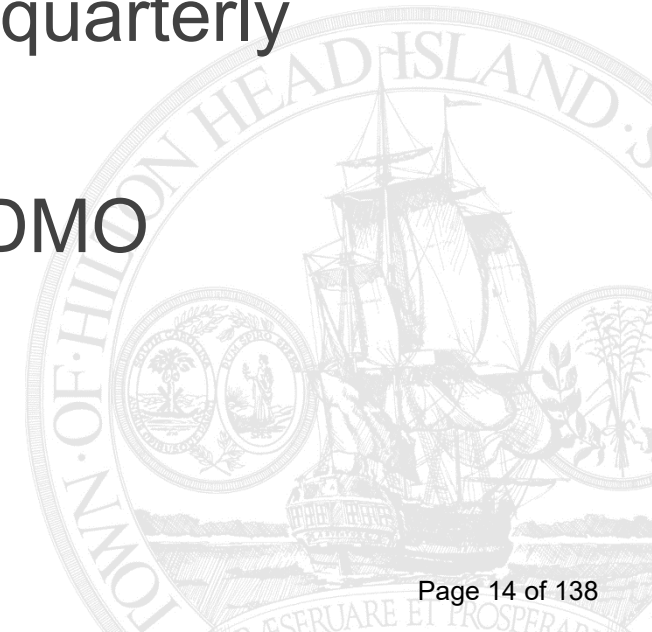
- Town contracted Hilton Head Island-Bluffton Chamber of Commerce Visitor and Convention Bureau to serve as its Destination Marketing Organization (DMO) in December 2020.
- Contract expires on December 1, 2025.
- The contract outlines the DMO's obligations, including:
  - The requirement to submit a budget of planned expenditures and a Marketing Plan for each fiscal year.
  - The steps and timing for the creation, review and approval of the annual Destination Marketing Plan and DMO budget.
  - The requirement to provide an independent auditor's report to the Town on an annual basis.
  - The requirement to provide an annual report that includes an overview of the DMO's activities and production for the year.



# FY24-25 Timeline – Marketing Plan & Budget

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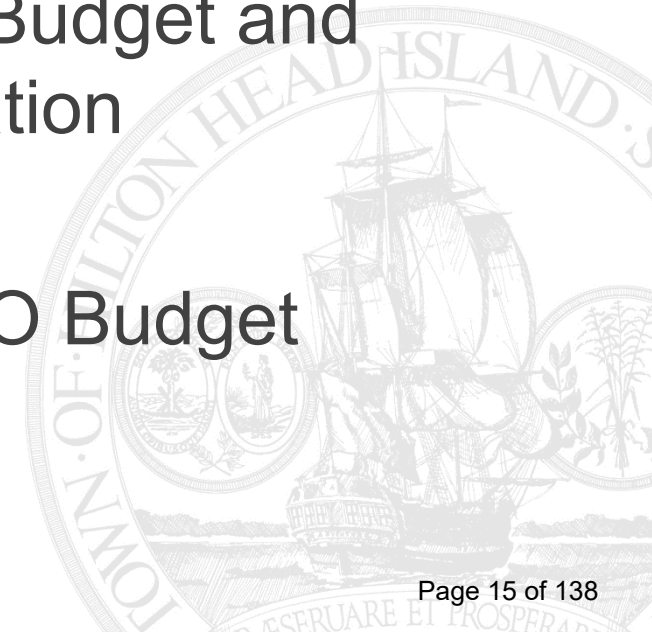
- ✓ February 1, 2024 - Hilton Head Island-Bluffton Chamber of Commerce/Visitor & Convention Bureau Marketing Council Annual Meeting.
- ❑ February 15, 2024 - Cornerstone Plan quarterly update with Marketing & Communications Team.
- ❑ March 5, 2024 – Presentation of Cornerstone Plan quarterly update to Town Council.
- ❑ March 22, 2024 – Destination Marketing Plan and DMO Budget due to be submitted to Town.



# FY24-25 Timeline - Continued

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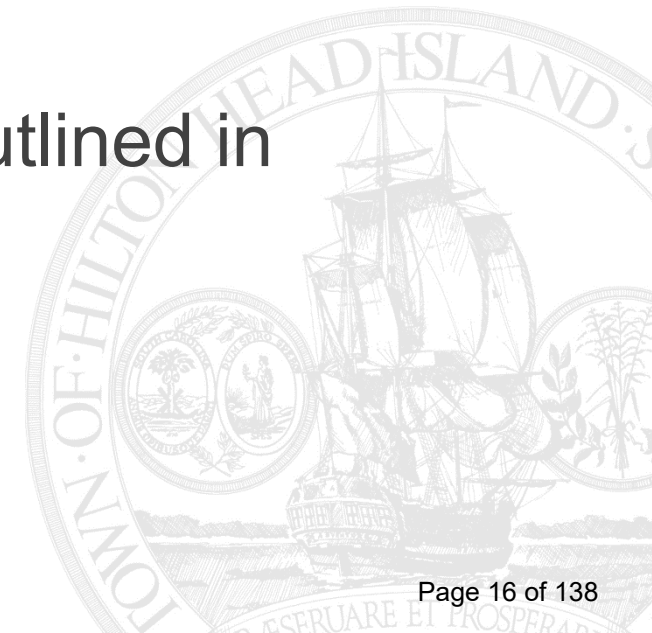
- ❑ March 29, 2024 – DMO Industry Metrics due to be submitted to Town.
- ❑ April 4, 2024 – DMO presents proposed Marketing Plan and Budget to Accommodations Tax Advisory Committee (ATAC) for consideration.
- ❑ May 14, 2024 – Destination Marketing Plan, DMO Budget and Industry Metrics presented to Finance & Administration Committee.
- ❑ June 4, 2024 – Destination Marketing Plan and DMO Budget presented to Town Council for consideration.



# DMO Reporting

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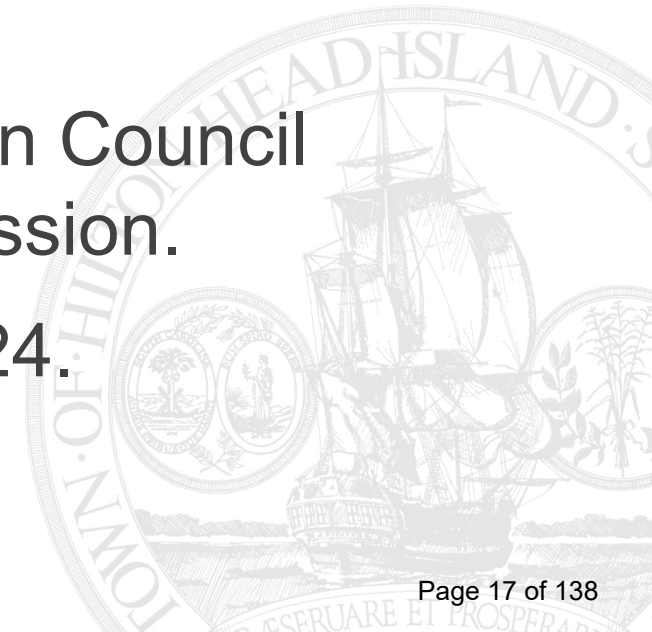
- Auditor's report – due on or before November 15th for the preceding fiscal year.
  - Specific requirements for auditor and audit are outlined in contract.
- DMO activity and productivity report – due on or before November 15<sup>th</sup> for the preceding fiscal year.
  - Metrics and other reporting requirements are outlined in contract.



# Town/DMO Partnership

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- Quarterly reporting and collaboration, not required by the contract, is taking place with Town Staff.
- Quarterly reports are received within 45 days of the end of each quarter.
- Reports will be shared with Town Council via email upon receipt.
- DMO will present report quarterly data at a Town Council meeting as soon as practical after report submission.
- First presentation is scheduled for March 5, 2024.



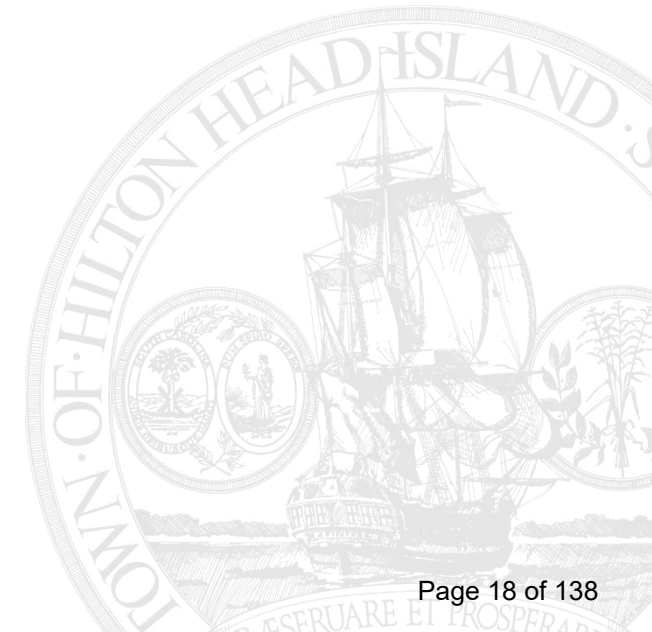
# Hilton Head Island

## 2024 Official Vacation Planner

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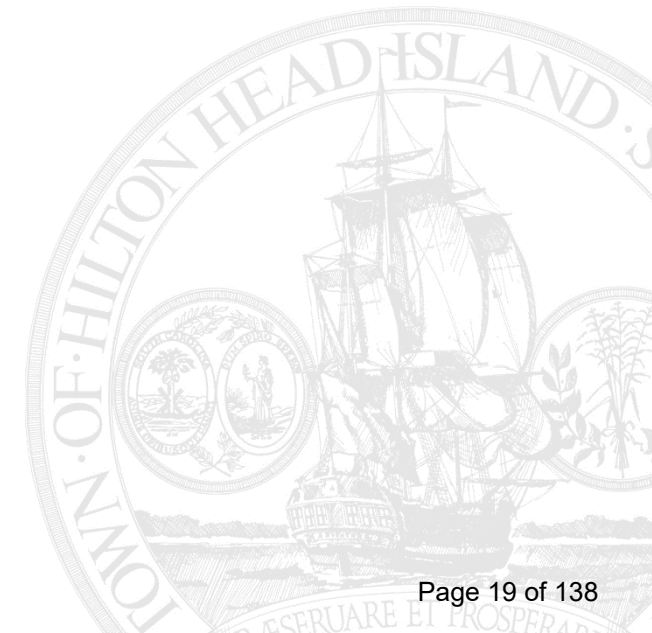
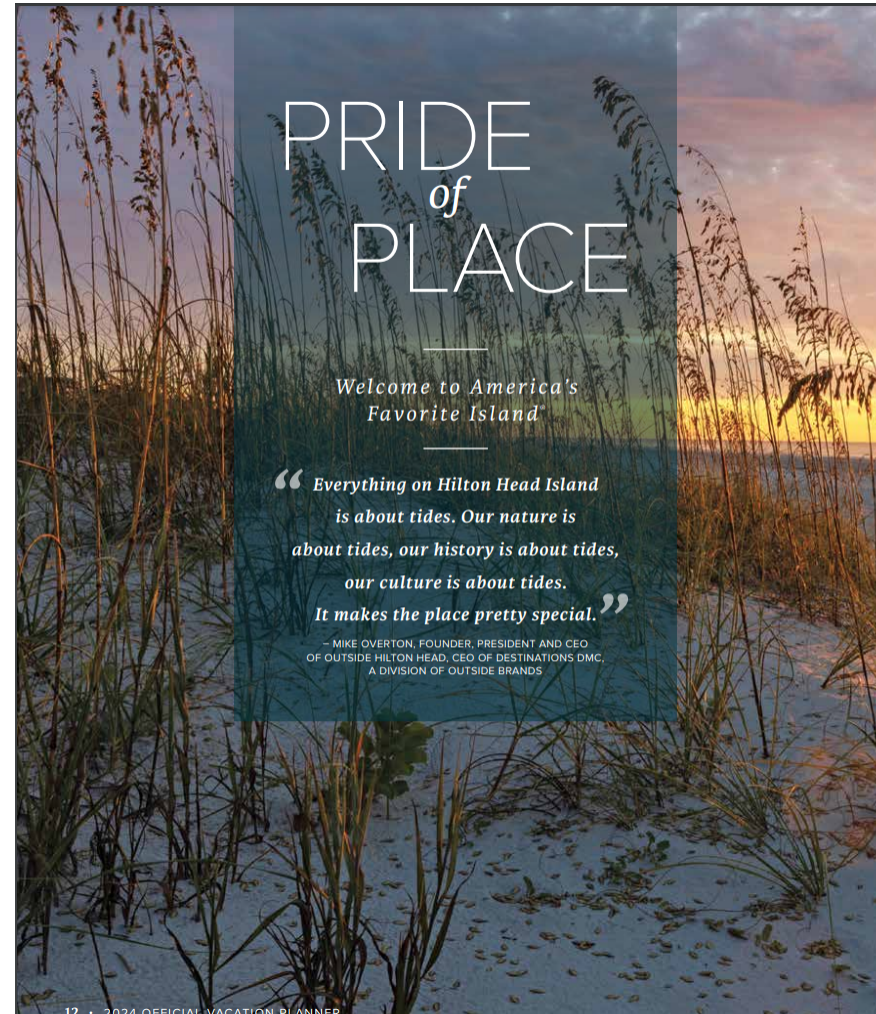
- Conspicuously features:
  - Arts & Culture
  - Ecotourism
  - History
  - Recreation
  - Wellness





# Pride of Place

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# Pride of Place

## WHILE YOU'RE HERE

Things to Do on Hilton Head Island

### ARTS & CULTURE

**PLAYS**  
The theater series at the Arts Center of Coastal Carolina includes crowd-pleasers like "Beautiful, the Carole King Musical," and "Chicago." See p. 84

**ART LESSONS**  
Whatever your artistic passions, the Art League Academy can guide you on your path from beginner to expert. See p. 85



**SYMPHONY ORCHESTRAS**  
For more than four decades, musicians have filled island venues with the works of classical composers. See p. 87

### ECOTOURISM



**DOLPHIN CRUISES**  
Join an experienced guide to get an up-close and personal look at these playful and intelligent marine mammals. See p. 99

**BIRDWATCHING**  
Hilton Head Island beaches are home and host to local and migrating shorebirds. Don't forget to look up! See p. 90

**NATURE PRESERVE**  
Sea Pines Forest Preserve's trails cross wetland boardwalks and bridges, giving you a chance to meander through protected wildlife habitat. See p. 22

### HISTORY



**COASTAL DISCOVERY MUSEUM & GULLAH MUSEUM**  
Learn how the Gullah Geechee islanders' language, art, food and skills continue to shape Island life. See p. 19

**RICH HERITAGE**  
The foresight of early developers like Charles Fraser shines through in today's landscape. See p. 15

**HISTORIC MITCHELLEVILLE**  
America's first self-governing community of formerly enslaved people was established as Historic Mitchelville Freedom Park. See p. 16



### RECREATION

**TENNIS AND PICKLEBALL**  
Get into the swing of it with these racquet sports that span generations and skill levels. See p. 116



**PADDLEBOARDING**  
Beginners and experts alike will find their balance – and lots of wildlife – on Hilton Head Island's coastal salt marshes. See p. 95

**BIKING**  
Experience the freedom of exploring nature on two wheels through our 60+ miles of leisure pathways. Our bike path map gives you the lay of the land. See p. 92

### WELLNESS

**CULINARY**  
Island chefs shop local farmers markets for fresh, nourishing ingredients. See p. 52

**SPA**  
Indulge in a day of self-care at one of the island's state-of-the-art spas. See p. 122



**SAILING/BOATING**  
For easy access to the island's peaceful waterways, check out these nearby marinas. See p. 100

### CONNECT WITH US

Stay connected with [HiltonHeadIsland.org](https://HiltonHeadIsland.org), your resource for all information on America's Favorite Island®.

Get social. Tag us in your photos and posts using [#LowcountryLife](https://www.instagram.com/lowcountrylife).

- Facebook [VisitHiltonHead](https://www.facebook.com/VisitHiltonHead)
- Instagram [VisitHiltonHead](https://www.instagram.com/VisitHiltonHead)
- X [HiltonHeadSC](https://twitter.com/HiltonHeadSC)
- Pinterest [HiltonHeadSC](https://www.pinterest.com/HiltonHeadSC)
- YouTube [HiltonHeadIslandofficial](https://www.youtube.com/HiltonHeadIslandofficial)
- TikTok [VisitHiltonHeadSC](https://www.tiktok.com/VisitHiltonHeadSC)

Year-Round Fun. No matter the season, Hilton Head Island has an event for that! For information on all 2024 events, visit [HiltonHeadIsland.org/events](https://HiltonHeadIsland.org/events).



# Pride of Place

PRIDE OF PLACE • HISTORY

## HISTORY & HERITAGE

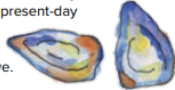
*Hilton Head Island's natural beauty has beckoned globetrotters for centuries. Thanks to the foresight of early land planners, those same pristine vistas await today's explorers.*

### HISTORICAL TIMELINE OF HILTON HEAD ISLAND

NATIVE AMERICAN

#### 2000 B.C. – 1400 A.D.

Remnants of oyster shells discarded by Native Americans can be found in present-day Sea Pines Forest Preserve and the Green's Shell Ring Enclosure Heritage Preserve.



SETTLEMENTS

**1717** Hilton Head Island's first settler, "Tuscarora Jack" Barnwell, founded Point Place Plantation.

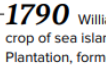
**1766** Starting in the mid 1700s, West Africans were enslaved and brought to Hilton Head Island to tend rice and cotton fields. By 1766, indigo was the primary crop, and there were 25 plantations on the island.

EARLY AMERICAN

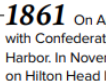


#### 1775 – 1783

The Revolutionary War: Hilton Head Islanders sided with colonists and skirmished with the British Loyalists from nearby Daufuskie Island. Four Revolutionary War soldiers are now buried or memorialized at the Zion Cemetery.



**1790** William Elliot grew the first successful crop of sea island cotton at Myrtle Bank Plantation, formerly Point Place Plantation.



**1861** On April 12, the Civil War began with Confederates firing on Fort Sumter in Charleston Harbor. In November, 12,653 Union troops came ashore on Hilton Head Island.



**1862** General Ormsby Mitchel set aside land for Mitchelville, America's first self-governing town of formerly enslaved people.

The Gullah Geechee saying, "we live by the land; we live by the sea" has encapsulated life on Hilton Head Island since Native Americans made their lives on the shores of South Carolina. Relying on natural resources like fresh seafood and rice and okra grown from fertile soils was the only way forward in Mitchelville, the site of America's first self-governing community of formerly enslaved people. And when Charles Fraser took steps to develop the island in the 1950s, he, too, wanted to protect the environment. In Sea Pines, the island's first planned community, Fraser limited development and insisted that nature take center stage. Long before the farm-to-table movement swept through restaurants around the country, Hilton Head Island natives lived off the land and sea and cherished their environment — a gift to be preserved.

Historic Mitchelville  
Freedom Park

EARLY AMERICAN

#### 1868 – 1950

When the Army left, so did the jobs for the Mitchelville citizens. Surviving through fishing and farming, Gullah people, direct descendants from enslaved people, moved from their half-acre Mitchelville lots to other parts of the island.



**1889 – 1930** Tracts of land were purchased by private citizens for hunting preserves. In 1912, the Hudson and Toomer families began operating oyster factories.

MODERN AGE

**1950** Lumbermen from Hinesville, Georgia, built sawmills and purchased 8,400 acres on the island to harvest the sea pines.

**1950s** Sea Pines, Hilton Head Island's first planned community, was imagined by Charles Fraser. See page 22 for more information.

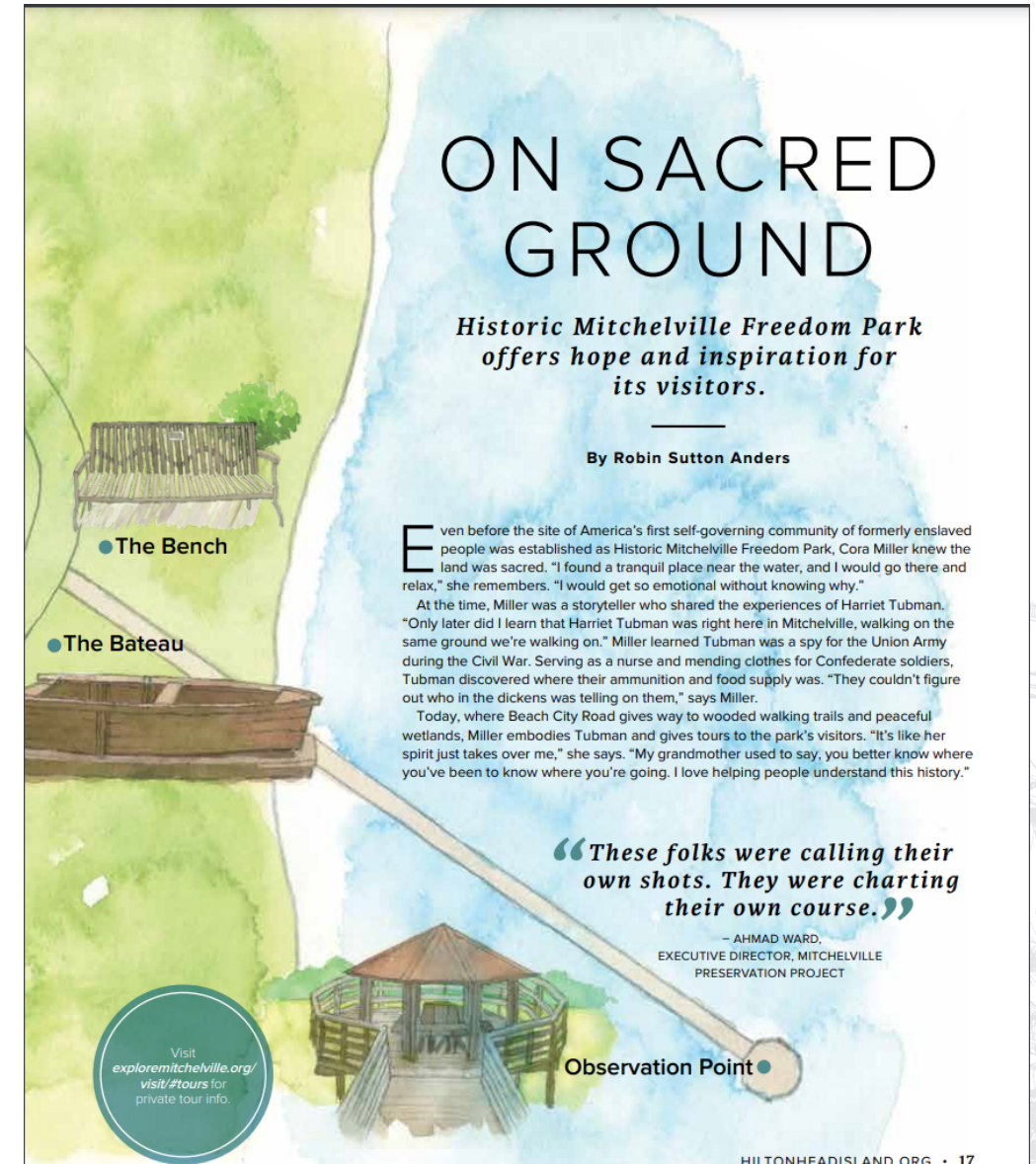


**1956** Byrnes Bridge was the first bridge constructed to connect the island to the mainland. Hilton Head Inn opened on South Forest Beach. The island's first grocery store opened at Coligny Plaza.

**1998** Cross Island Parkway was completed.

**2024** Hilton Head Island's permanent population: 40,000. Hilton Head Island welcomed over 3 million visitors in 2022. The vacation destination continues to uphold Charles Fraser's vision by prioritizing sustainability and environmental protection.

# Pride of Place





# Pride of Place

PRIDE OF PLACE • GULLAH



## THE RHYTHM OF GULLAH

Singer-songwriter Latrese Bush and founder of Hilton Head Island's Fish and Grits Music Festival was 17 years old when she fully grasped the magic of her small-town Bluffton childhood. "I was a freshman at the University of Georgia, and I felt like a fish out of water," she says. "At the time, Bluffton had about a thousand people in its town limits, and I was trying my best to survive a school population of 30,000."

One day, one of Bush's professors gave a lecture that changed her life. "He began to describe a beautiful culture on the coast of South Carolina and Georgia that still practiced the same crafts and cooked the same foods as their African ancestors. And then he said, 'They have a language, and their language has rules, and they're called Gullah.'" "That sentence changed how I looked at myself, and why I ultimately wanted to start the festival," she says. "I felt so much pride. I went to him after class, and I said, 'I am Gullah Geechee.' And he looked me in the eye and said, 'You come from a beautiful people.'"

As a child, Bush took so many things about her Gullah culture for granted. "I thought everybody walked out their back door to their garden and picked fresh tomatoes, collards, corn and squash for dinner," she says.

Bush assumed everybody had a river where they could catch whiting, blue crab and fresh shrimp. She didn't know it was unusual to live on the same land as her aunts and uncles and grandparents and cousins — to go outside and play a pick-up game of baseball or basketball with ready-made teammates. She thought everybody went to church and sang spirituals and clapped the Afro syncopation beat — the backbone of jazz, blues and gospel music that ties back to west Africa.

Now a professional artist, Bush displays an energetic style filled with rhythm. "It is a spirit of the Gullah Geechee," she says. That spirit, shared through music, food and dance, is what Bush wants others to experience through the Fish and Grits Music Festival. "I love to collaborate with other people and to make people happy, and that's what this festival is all about. It is a love letter to my community and a thank you note to my culture."

*"I have traveled all over the world, and there is no place like home. More than anything else, I would rather have a plate of fish and grits surrounded by my family and community."*

— LATRESE BUSH, SINGER-SONGWRITER

Mark your calendar for the first Saturday in October for the annual Lowcountry Fish and Grits Music Festival, held in Lowcountry Celebration Park.

## YOUR Gullah ITINERARY

*The rich Gullah creole dialect, a distinctive mixture of English and African languages, is still spoken and written. One of the best-known Gullah expressions, "Kumbaya," translated "come by here," found its way into a famous folk song. Whether you're traveling solo or with a group, read on for ways to experience the Gullah heritage on your next trip to Hilton Head Island.*

- **Visit Historic Mitchelville Freedom Park**, the first town created for formerly enslaved people, located on Hilton Head Island's Port Royal Sound.
- **Learn a 400-year-old history lesson** at the Gullah Museum from Dr. Louise Miller Cohen.
- **Join a Gullah Heritage Trail bus tour** through 10 family-based neighborhoods. Guides share first-hand accounts of Gullah food, folklore and language. Tours depart from the Coastal Discovery Museum.
- **Enjoy a fried fish dinner** with traditional Gullah sides at Binya, on various Friday nights throughout the year.
- **Book a Heritage Library Foundation tour** of Zion Cemetery and Baynard Mausoleum, the oldest intact structure on the island.
- **Take a Gullah tour of Daufuskie Island** with sixth-generation Daufuskie Island native Sallie Ann Robinson, also known as Pat Conroy's star pupil in his memoir *The Water is Wide*, who shares personal stories and memories.
- **Take a class** at the Coastal Discovery Museum. June through August at the Farmers Market, learn how Sea Islanders made indigo dye from a plant (and take home your own T-shirt!). Or make your own sweetgrass basket with the help of a Gullah expert sewer, Dino Badger (right), business partner of Michael Smalls of Gullah Sweetgrass Basket Creations.



## SAVE THE DATE

- **Hilton Head Island Gullah Celebration:** Throughout February, the island comes alive with authentic food, art, music, dancing and storytelling.
- **Annual Oyster Roast:** In March, the annual All You Can Eat Oyster Roast raises funds for the Gullah Museum.
- **Juneteenth:** June 19, 1865 marks the day the last slaves in the country were set free, more than two years after the Emancipation Proclamation was issued. Mitchelville celebrates by hosting Gullah food vendors, live music and lots of fanfare.
- **Gullah Food Festival:** In the fall, sample recipes of shrimp and grits, seafood gumbo, deviled crabs and more at the Gullah Museum.
- **Holiday Nights and Lights at Historic Mitchelville Freedom Park:** Annual holiday lights experience throughout Historic Mitchelville Freedom Park on Hilton Head Island.



# Pride of Place



## Preserving History for All

Since 2003, the **Gullah Museum of Hilton Head Island** has been committed to reviving, restoring and preserving Gullah customs, traditions, language, stories, songs and structures on the island. The museum is one of the most visited heritage cultural attractions in the state and offers unique insight into Gullah culture. The tours are conducted by founder and executive director Dr. Louise Miller Cohen. [gullahmuseumhhi.org](http://gullahmuseumhhi.org) • 843.681.3254 gullahmhhi



## History Lesson

Housing a wealth of historical information, **The Heritage Library** is the history and ancestry research center for Hilton Head Island and the Lowcountry. The Library owns two historic properties: Fort Mitchel, a Civil War earthwork battery, and the Zion Cemetery and Baynard Mausoleum, the site of the oldest existing structure on Hilton Head Island. The Library conducts tours, history programs and ancestry classes, and it is an excellent resource for genealogy research. [heritagelib.org](http://heritagelib.org) • 843.686.6560 heritagelibraryfoundation



## Where Freedom Began

**Historic Mitchelville Freedom Park** endeavors to share the compelling story of the inhabitants of Mitchelville and their quest for education, self-reliance and inclusion as members of a free society. [exploremitchelville.org](http://exploremitchelville.org) 843.255.7301 exploremitchelville



PRIDE OF PLACE • SUSTAINABILITY

## ECOTOURISM: PRESERVE AND PROTECT

By Eleanor Spicer Rice

For Hilton Head Islanders, Charles Fraser is a legend. But for councilman David Ames, he was also a friend — one of those friends with whom you share an unbreakable bond. In their case, it was a love of nature. “I think in many ways Charles saw nature as almost a spiritual force,” Ames says.

This was the early 50s, and Fraser, the forward-thinking developer, envisioned more than the typical beach destination for Hilton Head Island. “He’d driven up and down the east coast surveying all the coastal developments and realized the destruction that had occurred by the typical oceanfront construction,” says Ames.

As Fraser thought about how to develop Sea Pines, the island’s first planned community, he took an unconventional approach. Covenants and deed restrictions protected the environment. Instead of homes and structures on the beach, they were built away from the oceanfront, designed to blend in with the pine forest and create harmony with nature. And trees — not highway engineers — dictate the natural curvature of the road.

“Fraser understood that the birds and the bees and the subtropical vegetation all

had a place in this special environment,” Ames says. “He believed it was our job to preserve and protect that environment for future generations.”

Ames points to Harbour Town as a lasting example of Fraser’s belief that nature isn’t just restorative as a backdrop for peaceful exploration; it’s also a space for making memories. “He created Harbour Town because he understood that people have a desire to gather.”

The Town of Hilton Head Island continues to be inspired by Fraser’s vision. To protect the habitat and cultural resources, land is preserved for green spaces, parks and environmental protection.

Hilton Head Island Land Trust holds 300 acres, which includes Whooping Crane Pond Conservancy, Cypress Conservancy, Northridge Conservancy tracts and Museum Street Conservancy District.

The Visitor & Convention Bureau recognizes that everyone plays a role in the island’s sustainability and conservation efforts. To that end, visitors and residents are invited to make the Hilton Head Island Promise, committing to protect and preserve the island’s delicate ecosystem, leaving behind nothing but their footprints.

*“Man is a steward of the land. We should preserve, protect it. We have a great opportunity, and we live in a magnificently beautiful place.”*

— CHARLES FRASER

Whether you’re visting the Lowcountry or you are here to stay, learn more about our sustainability efforts and ways you can volunteer at [HiltonHeadIsland.org/sustainability](https://HiltonHeadIsland.org/sustainability).



### LOCAL VIEW WITH DAVID AMES

**What can visitors do to help Hilton Head Island's sustainability efforts?**

“Get out and explore! Visit the Coastal Discovery Museum. Walk through Mitchelville. Seek out the Sea Turtle Patrol. Bike the Shelter Cove Sculpture Trail. We preserve and protect the things that are important to us.”



# Pride of Place

PRIDE OF PLACE • SUSTAINABILITY

## NATURAL HARMONY

*On a mission to protect Hilton Head Island's ancient and beloved sea turtle*

By Robin Sutton Anders

Amber Kuehn was "changed forever" the day she first encountered a sea turtle 16 miles offshore from Hilton Head Harbor. Working as a divemaster, Kuehn was diving down to retrieve an anchor when she spotted a large shadow in the depths of the ocean. "It was graceful in its element, it looked like a bird flying in slow motion," she remembers. As the sea turtle swam straight toward her, she rolled back on her heels. "I laid on the ocean floor while the turtle hovered overhead like a spacecraft," Kuehn says. "Talk about impressed!"

Each summer, sea turtles return to the island's sandy shores, lay their eggs and go back to their ocean home. Loggerhead turtles, an endangered species, are the most common turtle to nest on the beaches of Hilton Head Island.

As director of Hilton Head Island's entirely volunteer 18-member Sea Turtle Patrol, Kuehn is on a mission to protect and conserve sea turtles so these ancient creatures can continue to inspire the next generation.

"It's important to do things like fill holes in the sand so sea turtle hatchlings don't get trapped on their way to the ocean," she says. Volunteers help flatten sand structures and pick up litter nightly so the turtles have a clear path. Sea Turtle Patrol also hosts educational, island-wide "Turtle Talks" for residents and visitors. Meanwhile, Kuehn's Sea Turtle Patrol has been trained and is permitted by the state to identify, mark and monitor nests. Through "nest dedications," the Sea Turtle Patrol offers opportunities to sponsor a nest in exchange for updates on its hatchlings as they grow and set off on their journey to the sea.



For more information, visit [seaturtlepatrolhhi.org](http://seaturtlepatrolhhi.org).



PHOTO BY JUDITH REANCE

### ISLAND SUSTAINABILITY

Join us in protecting and preserving Hilton Head Island's environment and beauty for generations to come.



Use red-beamed flashlights, sold at hardware stores, for nighttime beach strolls. You can also download a smartphone app, such as jLight, to turn your phone screen into a red flashlight.



Turn off outside lights of beachfront residences from dusk till dawn, and cover interior lights (close drapes or shutters) that can be seen from the beach.



Leave only footprints. Throw away your trash. Obstacles like broken beach chairs and sand buckets can prevent turtles from reaching their destination.



Stop by the Sharing Shack to find the missing tool to complete your family sandcastle — and to recycle your beach toys at the end of your vacation.



Make it easier for sea turtles and their hatchlings to navigate the shoreline by flattening your sandcastles and filling in any holes you dug when you're done with your day at the beach.



Enjoy discovering sea life like sand dollars, starfish and hermit crabs, but please leave these coastal creatures undisturbed in their natural habitat.



Please stay on the path. Walking on our beautiful sand dunes can damage or destroy the sea oaks and other flora keeping our dunes from washing away.



Maintain your distance from wildlife, including dolphins, sea turtle nests and hatchlings.

Want to learn more about our sustainability efforts and what you can do to get involved? Visit [HiltonHeadIsland.org/sustainability](http://HiltonHeadIsland.org/sustainability).

## A Private Paradise

Step out of the ordinary with a visit to **Outside Hilton Head's** 40-acre chain of private islands. Tucked between Daufuskie and Savannah, Page Island is the Lowcountry at its best. The island is outfitted for adventure, and Outside Hilton Head offers a variety of on-the-water experiences that center around this pristine tidal marsh setting. The Outback adventure combines a glorious boat ride to Page Island with a kayak tour of Daufuskie Island's backwater creeks. Outside's signature excursion, The Lowcountry Ultimate Day, often basecamps off Page Island. This ideal family outing offers activities like kayaking, paddleboarding, fishing, exploring, tubing and more, and is a fully customized trip that is truly Your Day, Your Way. [outsidehiltonhead.com](http://outsidehiltonhead.com) • 843.686.6996



[outsidehiltonhead.com](http://outsidehiltonhead.com) • 843.686.6996  
f @outside.experiences

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# Pride of Place

CHART YOUR COURSE • WELLNESS

## NATURAL HEALING

*Hilton Head Island is a sanctuary for the mind, body and spirit.*

By Laura Lee

Here, vacation and wellness go hand-in-hand. Fitness routines include options like sunrise walks and yoga on the beach. On-site chefs offer cooking demonstrations and private lessons. Since the all-inclusive health and wellness resort welcomed its first guests more than 40 years ago, Hilton Head Health has taken a holistic approach to overall health.

"Most people come thinking they want to lose weight, and through their time here, they realize they want to feel good," says David Chesworth, program director. "They want to have balance and feel comfortable — mind, body and soul."

A far cry from fad diets, Hilton Head Health's philosophy is all about developing day-to-day rituals that become sustainable, healthy habits. And what better place than a beautiful island, adds Chesworth. "What's really amazing about Hilton Head Health, in addition to its location on Hilton Head Island, is that it's an immersive environment where the healthy choice is the easy choice. It's like the training wheels for life!"



YOUR  
*Wellness*  
ITINERARY

- **Refuel with a healthy shake** or an energizing tea at Island Nutrition.
- **Breathe and renew** with Hilton Head Island Retreats for a greater well being of the body, mind and spirit.
- **Connect with nature** as you cast your fishing line or crab net at Rowing & Sailing Center, Jarvis Creek or Old House Creek Dock.
- **Take a quiet morning walk** through the Sea Pines Forest

Preserve; then recharge with a healthy lunch or smoothie at Healthy Habit.

- **Kayak through the island's serene inland waters** with Hilton Head Outfitters or Outside Hilton Head.

CHART YOUR COURSE • WELLNESS



## A Vacation With a Purpose

### HILTON HEAD HEALTH

A leading health and wellness resort with more than 40 years of experience guiding guests towards happier, healthier lives. The all-inclusive resort offers comprehensive programs featuring tailored fitness plans, educational lectures and gourmet cuisine. With unrivaled expertise in fitness, nutrition and overall health and wellness practices, Hilton Head Health provides its guests with the tools they need to transform their lives and create healthy habits. Enjoy a beautiful island retreat close to the beach with miles of walking and bike paths, nature tours, golf, tennis and kayaking adventures. Hilton Head Health is the perfect place for a healthy reset. [hhhealth.com/hhi](https://hhhealth.com/hhi) • 843.548.3472 [f](#) [@](#) [hiltonheadhealth](#)





# Pride of Place

CHART YOUR COURSE • DINING



**F**ried on a po'boy or enjoyed straight from the shell — nothing gives you a taste of the sea like a freshly shucked oyster.

"Hilton Head Island oysters are especially tasty," says Andrew Carmine, owner of Shell Ring Oyster Company and president of **Hudson's Seafood House on the Docks**.

"We have this perfect scenario of big changes in the tide, salty water, and a healthy amount of plankton," Carmine explains. "I love to eat oysters on the half shell, but our steamed oysters — an ode to the oyster roast — and our char-grilled oysters are really popular, as well."

Oysters are not just here for our culinary delight; they are vital to the local ecosystem.

Hudson's Seafood House on the Docks, along with more than a dozen other Hilton Head Island restaurants, has joined forces with **Outside Foundation** on the Oyster Recycling and Reef Building Initiative. Since the program's inception in 2018, more than 100 tons of oyster shells have been collected and recycled.

When a male and female oyster

reproduce, the larvae must attach to a hard surface. Recycled shells provide the ideal home for a new generation of oysters, called spat.

"The oyster reefs do a lot more than build the population of oysters for harvesting," says Mike Overton, Outside Foundation board member and CEO of **Outside Brands**. "Oyster reefs are effective in protecting our salt marshes."

According to Overton, South Carolina's salt marshes are the largest breeding ground in North America. Some 500,000 acres provide a home for a rich variety of fish and bird species.

Hudson's recycles many of its own shells on site, while tons of other shells in the area are discarded at **Coastal Discovery Museum at Honey Horn** on a designated spot on their 68-acre property. Once the oyster shells are cleaned and inspected by the South Carolina Department of Natural Resources, they are ready to go back into the water. Volunteers place the shells in netted bags and go out at low tide to build reefs — visitors are even invited to participate.

Coastal Discovery Museum President and CEO, Rex Garniewicz, says the initiative aligns with their mission. "We really want to connect people with the environment. We want to be a fun place for people to walk our trails, interact with our animals and see oysters growing in our marsh."

There, you can also see first-hand the benefits of a salt marsh — and learn about how everyday actions can make a difference. "Oyster shell recycling is one small thing we can do to protect this beautiful Lowcountry island that we love," Garniewicz says.

Carmine praises the Coastal Discovery Museum and the Outside Foundation for being proactive in replenishing oyster beds.

"We want to keep our Port Royal Sound watershed pristine and sustainable," he says. "When we do that, we're all able to enjoy the bountiful resources of our island."

Want to get involved with oyster shell recycling? Visit [outsidefoundation.org/get\\_involved](https://outsidefoundation.org/get_involved)



While all oysters on the East Coast — from Florida all the way up to Maine — are part of the same species, Atlantic oysters look and taste differently depending upon their specific location.

# Pride of Place

CHART YOUR COURSE • ARTS & CULTURE

## CULTURAL DISPLAY

Natalie Harvey, director of Cultural Affairs for the Town of Hilton Head Island, shows off some of her favorite art — and shares what each piece reveals about the Island's vibrance and diversity.

**Transcendence, Corrina Sephora**  
From a simple rowboat to a soaring bird, this forged, fabricated and recycled steel sculpture along the Shelter Cove Sculpture Trail celebrates nature on Hilton Head Island. "I love its scale; when you come across it, you're not expecting to see it," says Harvey. "Every time, I notice something different."



**Shrimp Trawler Captain Dave, Amiri Farris**  
When it was proposed in 1969, the industrial petrochemical plant would have ruined Bluffton's fishing, shrimping and oystering industry. This mural at the Rowing & Sailing Center at Squire Pope Community Park (133 Squire Pope Road) pays homage to a small coalition of Islanders, including Charles Fraser, who sailed to Washington, DC to put a stop to it. "In this park, kids learn how to fish and charter kayaks," Harvey says. "It's a great place to tell the story."



**Family, Jonathan Bowling**  
This family of horses just off of William Hilton Parkway (662 William Hilton Parkway) was strategically placed in a neighborhood historically owned by Gullah families. "Most would have had a Carolina Marsh Tacky horse, native to South Carolina," Harvey explains. "The sculptor uses a lot of recycled metal farm equipment that young viewers have fun identifying when they get up close."

Want more?  
Find a map of all the island's public art at [culturehhi.org/cultural-trail-map/](http://culturehhi.org/cultural-trail-map/).



Natalie Harvey in Shelter Cove with *Liquid Sunshine* by Michael Alfano



**Setting Sun, Tom Holmes**  
This sculpture by the playground in Lowcountry Celebration Park reminds its viewers that the idea of a setting sun is a creation of the mind — it only appears to rise and set because of the Earth's rotation. Frozen in time, this depiction of the sun encourages us to reflect on our environment.

Photo of Natalie Harvey courtesy of CH2 Magazine.

### YOUR Arts ITINERARY

For a small barrier island, Hilton Head Island offers numerous arts and cultural experiences. Whether you're in the mood for a Broadway-caliber production or a live jazz show, you'll find it here.

- **Try your hand** at watercolors or pastels with an art class at the Art League Academy.
- **Catch a musical** at the Arts Center of Coastal Carolina, the crown jewel of the island's art scene.
- **Get tickets to a play** at Lean Ensemble Theater, a professional company that produces thought-provoking plays sure to stimulate conversation.
- **Support young pianists** at the Hilton Head International Piano Competition in March.
- **Browse the lineup** for the fall month-long Crescendo Celebration, and choose from more than 100 arts and cultural programs and concerts including the annual Lantern Parade on the beach.
- **Pack a picnic for Pops in the Park** at Lowcountry Celebration Park with the Hilton Head Symphony Orchestra.
- **Enjoy dinner and a show** at The Jazz Corner, named one of the top 100 great jazz rooms in the world by *Downbeat* magazine.



- **Discover your new favorite poem** along the Hilton Head Island Poetry Trail, where local poets offer their interpretations of public art around the island. If you see this logo, scan the QR code to read the poem — and access a map of the trail.



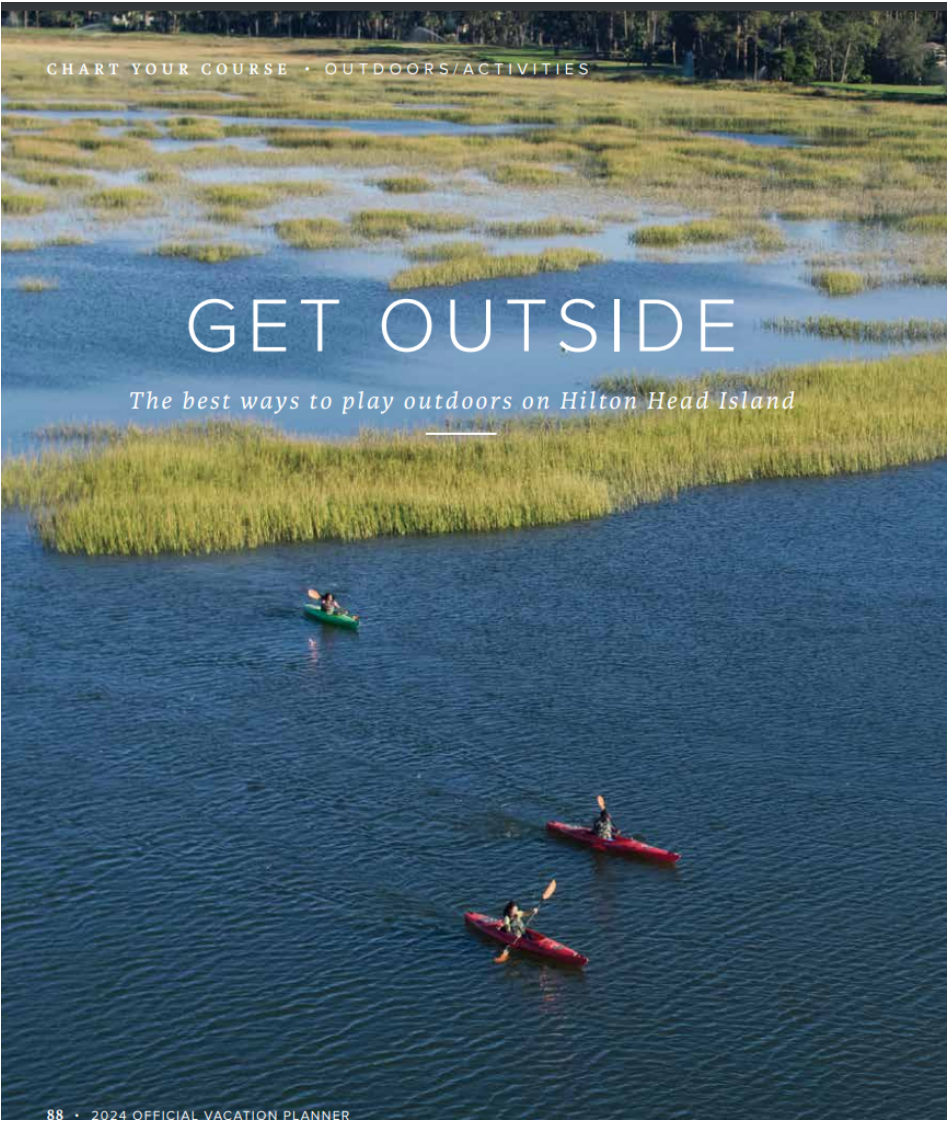
## A Season of Illustrations and Inspirations

The Hilton Head Choral Society's 47<sup>th</sup> season is underway with 83 choral voices under the direction of Dr. Dustin Ousley. This year, HHCS will perform an art-themed concert in the spring, "America Sings!" in May, a September pops performance and a holiday concert in December. Enjoy music and song by the full chorus, guest soloists and a professional orchestra. Their music ranges from opera and classical to Broadway and current hits. [hiltonheadchoralsociety.org](http://hiltonheadchoralsociety.org) • 843.341.3818 [hiltonheadsings](https://www.facebook.com/hiltonheadsings) [itsthehhcs](https://www.instagram.com/itsthehhcs)

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# Pride of Place





# Pride of Place

CHART YOUR COURSE • OUTDOORS/ACTIVITIES

ON TWO WHEELS

Hilton Head Island is a wonderland for bicyclists — even for those who haven't been on a bike in years.

By Linda Lanier



The Island received the Gold Level Bicycle Friendly Community designation by the League of American Bicyclists, and with over 60 miles of dedicated leisure pathways and hard-packed sand beaches, spending time on two wheels is a breeze.

Here are just a couple of the scenic routes you can take.

**BEACH RIDES AT LOW TIDE**  
*For salty breezes*  
Start at Coligny Beach Park, get on the beach, turn left and ride on the beach towards the north end of the island. A good spot to turn around is just before the "folly" at Burkes Beach (Beach Marker 9.8), about five miles up the beach. Enjoy the

wind on your face and the sounds of the breaking waves — memories that will stay with you long after you've returned home.

**SHELTER COVE COMMUNITY PARK TO HISTORIC MITCHELVILLE FREEDOM PARK**  
*For a glimpse of Island history*  
A pleasant afternoon ride begins at Shelter Cove Community Park. Enjoy lunch at one of the restaurants overlooking Broad Creek, then head north on the pathway for about two miles. Stop at the historic Zion Chapel of Ease and the Baynard Mausoleum, at the intersection of Mathews Drive (Mile Marker 6.0) and William Hilton Parkway. The eternal resting place of four Revolutionary War patriots, Baynard

Mausoleum is the oldest structure on the Island. Cross the William Hilton Parkway crosswalk at the traffic signal and then continue north on the William Hilton Parkway pathway. At Dillon Road, turn right, ride a couple of miles, then turn right on the Beach City Road pathway to the Historic Mitchelville Freedom Park on Port Royal Sound. Situated among the mossy live oaks and palmettos, learn the history of the first self-governing town of formerly enslaved people in America, dating back to the Civil War.

Bike Repair Stations are located at: Chaplin Community Park, Coligny Beach Park, Folly Field Beach Park and at Kroger's Shelter Cove Towne Centre.

92 • 2024 OFFICIAL VACATION PLANNER

CHART YOUR COURSE • TENNIS & PICKLEBALL



Play Like a Legend

Besides world-class golf, Port Royal Golf & Racquet Club is an award-winning tennis destination. Ranked as one of the Top 50 Greatest U.S. Tennis Courts by Tennis Magazine, Port Royal Racquet Club is better than ever. The Racquet Club's eight new Har-Tru clay courts are a joy for beginners and advanced players alike, thanks to the beautiful natural setting and an innovative hydro watering system that ensures seamless maintenance. Take your game to the next level with top-notch instruction and customized packages for individuals and groups. Two new pickleball courts are the draw for pickleball aficionados eager to finesse their skills.

hiltonheadgolf.net • 843.681.1750  
portroyaltennis portroyalracquetclub

120 • 2024 OFFICIAL VACATION PLANNER



# Pride of Place

CHART YOUR COURSE • GOLF

## HISTORY IN THE PLAYING

*Island golf courses share a rich legacy.*

By Linda Lanier

**G**olf is, of course, a game of skill and numbers — scores and yards, rankings and ratings. On Hilton Head Island, the figures go beyond pencil marks on a scorecard. Here, statistics signify a sense of history, woven into the fabric of some of America's most historic courses.

Like the 425-year-old oak tree — perhaps the oldest on the island — observing putts from the 15th green of the Arthur Hills course in Palmetto Dunes. Or the 92-foot-tall Hilton Head Rear Range Lighthouse, which is listed on the National Register of Historic Places. Before it stood watch over Palmetto Dunes golfers, it guided ships into Port Royal Sound and served as the site for Camp McDougal, a World War II Marine training station for anti-aircraft units.

Two decades earlier, Port Royal housed about 30,000 Union troops and tradespeople. Today, the site is home to two courses that wind their way through lush palmettos and oaks of the old Civil War garrison. On the ninth and 10th holes of the Robber's Row course, golfers today play on the site of the village's main street, where saloons, restaurants and stores served the town.

One of the island's original courses, the Barony Course, opened for play in 1969 — more than 200 years after the first golf balls and clubs arrived in South Carolina. In 1739, the equipment was shipped from

Leith in Scotland to Scottish merchants and planters in Charleston. These early golfers played with a "featherie ball" handcrafted of cowhide and stuffed with goose feathers, which would occasionally explode on impact.

"There are so many things that make this a special place," says Davis Love III, a five-time winner of the RBC Heritage Presented by Boeing. The elevated PGA TOUR event is played each April at Harbour Town in The Sea Pines Resort.

One of the crown jewels of Hilton Head Island golf, the Pete Dye- and Jack Nicklaus-designed Harbour Town Golf Links has played host to most of the game's greats, including the 2023 champion, Matt Fitzpatrick, who attended the RBC Heritage as a child.

Harbour Town Golf Links is carved out of the sandy soil, through the palmettos, pines and oaks, with the famous 18th running along the Calibogue Sound. The public links course offers a challenge to scratch — and the not-so-scratch — golfers.

Whether you're a novice or a professional, the rich heritage of Hilton Head Island golf invites you to make your own history on these prestigious courses. With 23 courses on Hilton Head Island, rated among the "best of" American golf, there's a great experience to match every skill level.





Visit [hiltonheadlighthouse.com](https://hiltonheadlighthouse.com) for more info.

Hilton Head Rear Range Lighthouse and 425-year-old oak tree at Palmetto Dunes

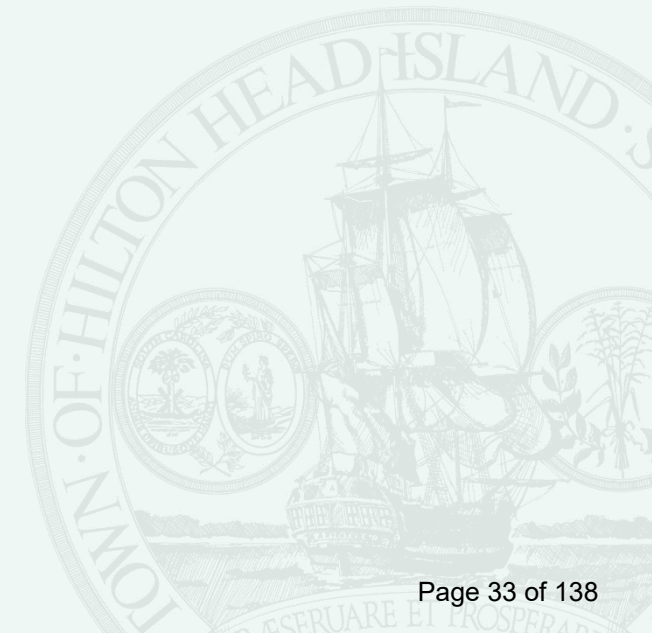
Photo by Edward C. Robinson III

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# Questions?

**Finance & Administrative Committee**  
**February 13, 2024**





# TOWN OF HILTON HEAD ISLAND

## Finance & Administrative Committee

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**TO:** Finance & Administrative Committee  
**FROM:** Jeff Herriman, *Interim Finance Director*  
**VIA:** Marc Orlando, *ICMA-CM, Town Manager*  
**CC:** Josh Gruber, *Deputy Town Manager*  
**DATE:** February 5, 2024  
**SUBJECT:** Fiscal Year 2025 Affiliated Agency Funding Requests

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### **RECOMMENDATION:**

Staff recommends that the Finance & Administrative Committee:

**On February 13, 2024** – receive and review the Fiscal Year 2025 Affiliated Agency applications submitted to the Finance Department. Determine if any of the applicants should make a presentation on their funding requests at the March 12, 2024, Finance & Administrative Committee meeting.

**On March 12, 2024** – vote to recommend funding levels for applications received by the Committee at the February 13, 2024, meeting. These recommendations would be included in the proposed Fiscal Year 2025 budget for Town Council to consider in May 2024.

### **BACKGROUND:**

Town Council voted on August 19, 2021, to establish a new process and policy to accept and review Affiliated Agency applications. Initial correspondence was sent to all current Town Affiliates on December 14, 2023, to inform them of the application opening date, January 2, 2024. The due date for all applications to be submitted in their entirety was on or before January 31, 2024, at 4:30 pm.

As part of the Fiscal Year 2025 Affiliated Agency Application process, the Town has received eleven applications for the Committee to review. A funding request is also listed for the MOU with a two-year term for USCB Event Management & Hospitality Training. The MOU was approved by the Finance & Administrative Committee at the meeting on December 19, 2023, and will be considered by Town Council at the February 20, 2024, meeting.



The requests are as follows for consideration:

| Town of Hilton Head Island                                                                            |                     |                     |                     |                      |                |
|-------------------------------------------------------------------------------------------------------|---------------------|---------------------|---------------------|----------------------|----------------|
| Affiliated Agency Funding Requests FY 2024 and FY 2025                                                |                     |                     |                     |                      |                |
|                                                                                                       | FY 2024             |                     | FY 2025             |                      |                |
|                                                                                                       | Applicant Request   | Adopted Budget      | Applicant Request   | F & A Recommendation | Adopted Budget |
| Hilton Head Island Recreation Association                                                             | \$ 1,123,766        | \$ 1,123,766        | \$ 1,167,366        |                      |                |
| Coastal Discovery Museum                                                                              | \$ 102,432          | \$ 102,432          | \$ 107,700          |                      |                |
| Mitchelville Preservation Project                                                                     | \$ 105,000          | \$ 105,000          | \$ 105,000          |                      |                |
| USCB Event Management & Hospitality Training*                                                         | \$ 238,985          | \$ 238,985          | \$ 235,000          |                      |                |
| LRTA - Palmetto Breeze                                                                                | \$ 249,911          | \$ 277,842          | \$ 253,595          |                      |                |
| 14th Circuit Solicitor - Multidisciplinary Court                                                      | \$ 50,000           | \$ 50,000           | \$ 50,000           |                      |                |
| 14th Circuit Solicitor - Career Criminal Program                                                      | \$ 118,500          | \$ 118,500          | \$ 118,500          |                      |                |
| Beaufort County Economic Development Corporation                                                      | \$ 40,000           | \$ 40,000           | \$ 40,000           |                      |                |
| Hilton Head Regional Habitat for Humanity                                                             | \$ 500,000          |                     | \$ -                |                      |                |
| Beaufort Jasper Economic Opportunity Commission                                                       |                     |                     | \$ 100,000          |                      |                |
| BlacQuity                                                                                             |                     |                     | \$ 75,000           |                      |                |
| Memory Matters                                                                                        |                     |                     | \$ 50,000           |                      |                |
| Sea Turtle Patrol Hilton Head Island                                                                  |                     | \$ -                | \$ 73,480           |                      |                |
| <b>Total</b>                                                                                          | <b>\$ 2,528,594</b> | <b>\$ 2,056,525</b> | <b>\$ 2,375,641</b> | <b>\$ -</b>          | <b>\$ -</b>    |
| *Finance & Administrative Committee recommendation for a two-year term pending Town Council approval. |                     |                     |                     |                      |                |

## **SUMMARY:**

The upcoming affiliated agency calendar for the Fiscal Year 2025 is as follows:

1. Finance & Administrative Committee receives applications at its regular meeting (February 13th, 2024)
2. Finance & Administrative Committee makes recommendations for the budget to Town Council (March 12th, 2024)
3. Town Council considers the affiliated agency funding recommendations as part of the overall budget proposal (First Reading May 7, 2024, and Second Reading June 4, 2024)

Staff is providing the Committee with copies of all Submitted Applications.

## **ATTACHMENTS:**

1. Spreadsheet of Fiscal Year 2025 Affiliated Agency Funding Requests
2. Fiscal Year 2025 Affiliated Agency Applications

## Attachment 1

Town of Hilton Head Island  
Affiliated Agency Funding Requests FY 2024 and FY 2025

|                                                  | FY 2024             |                     | FY 2025             |                      |                |
|--------------------------------------------------|---------------------|---------------------|---------------------|----------------------|----------------|
|                                                  | Applicant Request   | Adopted Budget      | Applicant Request   | F & A Recommendation | Adopted Budget |
| Hilton Head Island Recreation Association        | \$ 1,123,766        | \$ 1,123,766        | \$ 1,167,366        |                      |                |
| Coastal Discovery Museum                         | \$ 102,432          | \$ 102,432          | \$ 107,700          |                      |                |
| Mitchelville Preservation Project                | \$ 105,000          | \$ 105,000          | \$ 105,000          |                      |                |
| USCB Event Management & Hospitality Training*    | \$ 238,985          | \$ 238,985          | \$ 235,000          |                      |                |
| LRTA - Palmetto Breeze                           | \$ 249,911          | \$ 277,842          | \$ 253,595          |                      |                |
| 14th Circuit Solicitor - Multidisciplinary Court | \$ 50,000           | \$ 50,000           | \$ 50,000           |                      |                |
| 14th Circuit Solicitor - Career Criminal Program | \$ 118,500          | \$ 118,500          | \$ 118,500          |                      |                |
| Beaufort County Economic Development Corporation | \$ 40,000           | \$ 40,000           | \$ 40,000           |                      |                |
| Hilton Head Regional Habitat for Humanity        | \$ 500,000          |                     | \$ -                |                      |                |
| Beaufort Jasper Economic Opportunity Commission  |                     |                     | \$ 100,000          |                      |                |
| BlacQuity                                        |                     |                     | \$ 75,000           |                      |                |
| Memory Matters                                   |                     |                     | \$ 50,000           |                      |                |
| Sea Turtle Patrol Hilton Head Island             |                     | \$ -                | \$ 73,480           |                      |                |
| <b>Total</b>                                     | <b>\$ 2,528,594</b> | <b>\$ 2,056,525</b> | <b>\$ 2,375,641</b> | <b>\$ -</b>          | <b>\$ -</b>    |

\*Finance & Administrative Committee recommendation for a two-year term pending Town Council approval.

# **Fiscal Year 2025**

## **Affiliated Agency Grant Application**

**Organization Name:** 14th Circuit Solicitors Office

**Project Name:** Career Criminal Program & Multi-Disciplinary Court

### **Executive Summary**

An Effectiveness Measurement spreadsheet has been attached to this application.



# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/19/2024

Time Received: 10:19 AM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### A. SUMMARY OF GRANT REQUEST:

**ORGANIZATION NAME:** 14th Circuit Solicitors Office

**Project/Event Name:** Career Criminal Program & Multi-Disciplinary Court

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:** \$5,650,000.00

**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 14-year track record of reducing crime by targeting the most violent and habitual offenders for priority prosecution. The latter seeks to help 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:

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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 25 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 \$785,000 annually. This includes salary and fringe benefits for attorneys, investigators and a victim advocate; court-related expenses; and other administrative costs. Hilton Head Island'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 479 of the 524 defendants it has prosecuted since its formation in 2009 (through Jan. 16, 2024). 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 \$529,790 in FY2025. This includes salary and fringe benefits for seven full-time employees; compensation and training for four 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 33%.

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 accommodated and reliance on more expensive 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. In the era of opioids and fentanyl, its mission his life-saving. 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)*

A few 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. Among the most recent are Tyreek Lorenzo Robinson, who was sentenced to 27 years in prison in June 2022 for breaking into a pregnant woman's house and assaulting her as she slept. This past November, 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 the past five years, the MDC has served 147 participants across Beaufort County, 40 of whom have either lived, worked or committed their offense on Hilton Head. Of those 40 participants, only one has had to be terminated from the program.

**C. FUNDING:**

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

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Since FY 2018, our office has operated on an annual budget of between \$4.4 million and \$5.6 million. About 45% 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.

|      |                                     |     |                                             |
|------|-------------------------------------|-----|---------------------------------------------|
| 86.8 | Government Sources                  | 8.8 | Private Contributions, Donations and Grants |
|      | Corporate Support, Sponsors         |     | Membership, Dues, Subscriptions             |
| 4.4  | Ticket Sales, or Sales and Services |     | Other                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. (100 words or less)

Both the CCU and the MDC are financed primarily through a combination of general appropriations from county governments and the General Assembly. The CCU receives additional funding through an appropriation from Jasper County that is earmarked for this program. For much of its history, MDC has operated only in Beaufort County because it alone could provide the community resources necessary to support it. Those resources include funding from the county and the Town of Hilton Head Island, as well as agencies that can provide such services as addiction treatment, vocational rehabilitation and transitional housing. We expanded into Colleton and Jasper counties in 2021, using a three-year \$750,000 federal grant that allowed us to add in-house counseling services that were in short supply or unavailable in those counties. One feature of that

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

Both the CCU and the MDC are financed primarily through a combination of general appropriations from county governments and the General Assembly. The CCU receives additional funding through an appropriation from Jasper County that is earmarked for this program. For much of its history, MDC has operated only in Beaufort County because it alone could provide the community resources necessary to support it. Those resources include funding from the county and the Town of Hilton Head Island, as well as agencies that can provide such services as addiction treatment, vocational rehabilitation and transitional housing. We expanded into Colleton and Jasper counties in 2021, using a three-year \$750,000 federal grant that allowed us to add in-house counseling services that were in short supply or unavailable in those counties. One feature of that

#### D. FINANCIAL INFORMATION:

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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.

Balance Sheet Years Provided:

FY2016-2021

#### E. MEASURING EFFECTIVENESS:

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1. List any award amounts received in fiscal year 2023 and/or 2024.

|      |              |                                                  |
|------|--------------|--------------------------------------------------|
| 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 |

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 over the past several fiscal years – \$118,500 in support of CCU operations and \$50,000 in support of MDC.

Both programs show healthy key metrics, despite lingering effects of the COVID-19 pandemic. CCU has earned convictions against 103 defendants in the three years since General Sessions Court operations essentially returned to normal. In CY2023, the unit secured convictions against 13 of 15 Beaufort County defendants it prosecuted and three of four southern Beaufort County defendants. COVID also stalled new admissions to MDC, but that program, too, has now recovered. In fact, at one point in CY2023, it boasted a record-high 53 participants circuit-wide and closed the year with 49. While growing numbers can be attributed largely to expansion into Colleton and Jasper Counties,



Beaufort County's program serviced 49 participants at some point in CY2023. Twenty-four of its participants have graduated since the start of FY2022, nine of them from Hilton Head. MDC maintained a 90% graduation rate in CY2022 and in CY2023 posted a 34% two-year recidivism rate (a calculation that checks the records of 2021 graduates for criminality), both well within the program's historic range.

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 Teresa Pye also participates in monthly roundtables with other program leaders, during which they discuss the key performance indicators of each and suggest ways to create synergies across departments. From these roundtables come monthly dashboard reports to Solicitor Stone, ensuring that progress is constantly monitored and problems quickly addressed at our office's highest level.

## F. EXECUTIVE SUMMARY

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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: Jeff Kidd

Title/Position: Administrative Chief of Staff

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

Email Address: [jkidd@scsolicitor14.org](mailto:jkidd@scsolicitor14.org)

Phone Number: 843-790-6439

# **Fiscal Year 2025**

## **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 \$40,000 in funds contributed have been 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 2025

## Affiliated Agency Grant Application

Date Received: 01/29/2024

Time Received: 10:19 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### 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@beaufortscedc.org

Contact Phone: 860-685-0689

**Total Budget:** \$2,103,669.00

**Grant Amount Requested:**  
\$40,000.00

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 64 deals, amounting to \$342 million and 1,600 new and retained jobs. On Hilton Head Island specifically we have facilitated: \$42 million investments, 253 jobs averaging \$52,649 per year, \$2.6 million in investments. 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:**

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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 64 deals, amounting to \$342 million and 1,600 new and retained jobs. On Hilton Head Island specifically we have facilitated: \$42 million investments, 253 jobs averaging \$52,649 per year, \$2.6 million in investments. 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 \$40,000 contributions from Bluffton, Beaufort and Port Royal, a \$375,000 operations funding from Beaufort County, and 780,644 from the County for site development and grants to companies. The balance of our budget comes from utility tax credits, sponsors 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 \$40,000 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 are working 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 and other sites to be identified as Hilton Head Island priorities.

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) \$918,700

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

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

|     |                                     |      |                                             |
|-----|-------------------------------------|------|---------------------------------------------|
| 69  | Government Sources                  | 28.6 | Private Contributions, Donations and Grants |
| 2.4 | Corporate Support, Sponsors         | 0    | 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 2024 and fiscal year 2025. *(100 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.

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:

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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 21

FY 20

FY 22

FY 22

FY 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:

FY 21

FY 20

22

23

## E. MEASURING EFFECTIVENESS:

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1. List any award amounts received in fiscal year 2023 and/or 2024.

|      |             |                             |
|------|-------------|-----------------------------|
| 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 |

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. In the last fiscal year the efforts of the BCEDC resulted in \$61.5 M in investments and 315 jobs. According to Clemson's Regional Economic Analysis Lab, the work of the BCEDC will have the following impact on Hilton Head Island: "

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."

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 \$40,000 in funds contributed have been 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@beaufortscedc.org](mailto:jotoole@beaufortscedc.org)

Phone Number: 860-685-0689



# **Fiscal Year 2025**

## **Affiliated Agency Grant Application**

**Organization Name:** Beaufort Jasper EOC

**Project Name:** HHI Community Enrichment

### **Executive Summary**

An Effectiveness Measurement spreadsheet has been attached to this application.

# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/31/2024

Time Received: 03:59 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### A. SUMMARY OF GRANT REQUEST:

**ORGANIZATION NAME:** Beaufort Jasper EOC

**Project/Event Name:** HHI Community Enrichment

**Contact Name:** James Williams

**Title:** Executive Director

**Address:** 1905 Duke Street, Suite 250, Beaufort, SC 29901

**Email Address:**

jgwilliams@thebjeoc.org

**Contact Phone:** 843-255-7221

**Total Budget:** \$11,750,000.00

**Grant Amount Requested:**  
\$100,000.00

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

Hoping to receive funding via the Town of Hilton Head Island's Fiscal Year 2025 Affiliated Agency Grant', the Beaufort Economic Opportunity Commission (BJEOC) can implement an alternative type of transportation to assist our HHI senior residents to our agency for needed services and programs.

The key is making it as easy and reliable as possible for seniors to schedule and access transportation and provide assistance as needed. A robust system can greatly aid seniors' health and well-being, with wide-reaching benefits.

## B. DESCRIPTION OF OPERATIONS:

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

For over 50 years, the Beaufort Economic Opportunity Commission (BJEOC) has assisted countless families in the Beaufort and Jasper County areas. We are a nonprofit organization that provides a variety of services, programs, and initiatives to increase economic opportunity and self-sufficiency among our local residents. We promote advocacy and initiatives to address systemic economic challenges in the community; offer assistance with basic needs like food, housing, utilities, and healthcare access; and administer community development and antipoverty programs through partnerships, sponsorships, and funding.

With funding from the Town of Hilton Head Island's Fiscal Year 2025 'Affiliated Agency Grant', we can implement innovative and resourceful methods to safeguard a good quality of life for our senior residents. Unfortunately, our senior residents are more likely to lose assistance for basic living necessities. Funding from this grant will focus on the transportation needs of our senior residents of Hilton Head Island. This grant will serve the Town of Hilton Head Island by improving services, reducing costs, aiding the economy, and enhancing quality of life through additional transit options. BJEOC will be able to offer a better transportation infrastructure that creates a safer, more accessible commute for our *(low-income/qualified)* senior residents.

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

BJEOC proposes to assist our HHI senior residents with transportation assistance by utilizing the our BJEOC agency's Community Outreach vehicle to transport our HHI senior clients and potential clients to our local office for assistance as needed.

We will:

- Hire a driver(s)/coordinator
- Create a scheduling system
- Establish pickup/drop-off protocols
- Communicate regularly to inform seniors of services
- Monitor the project and refine the service as needs evolve.

This transportation option will provide service for four (4) days a week, Monday through Thursday.

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 BJEOC receives only partial funding for this transportation project, we will make the necessary provisions. Our organization will contact, with hopes of establishing a partnership with, our local HHI's senior citizen and family/community services organizations to schedule a time to meet senior residents and provide services at that particular location.

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

BJEOC does not have any future capital projects, nor do we anticipate upcoming matters that might impact future operations or financial requests related to the Town of Hilton Head Island's Fiscal Year 2025 Affiliated Agency Grant.

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

C. FUNDING:

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

BJEOC is currently funded by federal, state, local, and private sponsors and partners.

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

|                                                            |                                                                    |
|------------------------------------------------------------|--------------------------------------------------------------------|
| <div>Government Sources</div> <div></div>                  | <div>Private Contributions, Donations and Grants</div> <div></div> |
| <div>Corporate Support, Sponsors</div> <div></div>         | <div>Membership, Dues, Subscriptions</div> <div></div>             |
| <div>Ticket Sales, or Sales and Services</div> <div></div> | <div>Other</div> <div></div>                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. *(100 words or less)*

4. Please provide a summary of other sources of funding 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.

An Organization Budget has been attached to this Application.

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

Profit and Loss Years Provided:

2023

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:

2021-22

2021-22 Income

## E. MEASURING EFFECTIVENESS:

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1. List any award amounts received in fiscal year 2023 and/or 2024.

2. How were those funds used? To what extent were the objectives achieved?

*(200 words or less)*

n/a

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

In focus with our current mission

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

Overall community impact

## F. EXECUTIVE SUMMARY

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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: James Williams

Title/Position: Executive Director

Mailing Address: 1905 Duke Street, Suite 250, Beaufort, SC 29901

Email Address: [jgwilliams@thebjeoc.org](mailto:jgwilliams@thebjeoc.org)

Phone Number: 843-255-7221

# **Fiscal Year 2025**

## **Affiliated Agency Grant Application**

**Organization Name:** BlacQuity

**Project Name:** BEU Program

### **Executive Summary**

We will ensure that our resources are optimized to yield the best possible results. It also enables us to adapt and refine our strategies based on the data we collect, enhancing our ability to achieve our objectives effectively and efficiently. Our objective of promoting economic equity and empowering black-owned businesses by maximizing the impact of our efforts from our resources.

# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/31/2024

Time Received: 04:15 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### A. SUMMARY OF GRANT REQUEST:

**ORGANIZATION NAME:** BlacQuity

**Project/Event Name:** BEU Program

**Contact Name:** Gwen Chambers

**Title:** Executive Director

**Address:** PO BOX 3132, Bluffton, SC 29910

**Email Address:** gwen@blacquitysc.org

**Contact Phone:** 843-707-5271

**Total Budget:** \$196,895.00

**Grant Amount Requested:** \$75,000.00

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

The grant funds will be used to support the implementation of the Black Business Empowerment Initiative (BBEI) for Black Equity University (BEU) by BlacQuity. This initiative aims to empower and support black-owned businesses affiliated with the Town by providing resources, training, and networking opportunities. The funds will be allocated towards personnel costs for a Program Coordinator and facilitators, as well as expenses related to training workshops, networking events, consultation services, and the development of a public impact assessment toolkit. The grant will directly contribute to the capacity building and growth of black-owned businesses, ultimately benefiting the local economy and community.

[www.blacquitysc.org](http://www.blacquitysc.org)

## B. DESCRIPTION OF OPERATIONS:

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

BlacQuity is a non-profit organization dedicated to promoting, uplifting, and empowering black-owned businesses within the Town and its surrounding communities. Our mission is to reshape the entrepreneurial ecosystem by providing equitable opportunities for business ownership and community transformation. We achieve this through initiatives like the Black Equity University (BEU), a 12-week accelerator program aimed at providing comprehensive support to black entrepreneurs. Additionally, our Get Seeded Pitch Night - BEU IGNITE offers funding opportunities for innovative business ideas through pitch events, further fostering entrepreneurship and economic growth.

The requested funding will be used to support the implementation of the Black Business Empowerment Initiative (BBEI) of Black Equity University (BEU), a strategic program designed to empower and support black-owned businesses affiliated with the Town. The funding will enable us to provide essential resources, training, and networking opportunities to enhance the capacity and effectiveness of these businesses in delivering services that benefit the public on the Town's behalf. This includes personnel costs for a dedicated Program Coordinator and facilitators, as well as expenses related to training workshops, networking events, consultation services, and the development of a public impact assessment toolkit.

By investing in the Black Business Empowerment Initiative, the funding will directly contribute to the public function of the Town by promoting economic development, fostering entrepreneurship, and supporting the growth of black-owned businesses. This initiative aligns with the Town's goals of promoting diversity, equity, and economic prosperity within the community. Additionally, the fun



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

The grant funds will be used to implement the Black Equity University (BEU) program, specifically focusing on capacity building, networking, and performance improvement for black-owned businesses affiliated with the Town. This includes:

1. Personnel Costs: Hiring a dedicated Program Coordinator and facilitators to oversee the implementation of the program.
2. Training Workshops: Conducting regular workshops and training sessions to enhance the organizational capacity of black-owned businesses in areas such as business management, financial literacy, marketing, and customer relations.
3. Networking Events: Organizing networking events and forums to facilitate interaction and collaboration among black-owned businesses.
4. Consultation Services: Offering consultation services to assist black-owned businesses in addressing specific challenges and opportunities.
5. Public Impact Assessment Toolkit: Developing a toolkit for assessing the public impact of projects undertaken by black-owned businesses to ensure alignment with public goals and transparency in funding allocation.

BlacQuity is committed to leveraging additional funds to support the operations. We will seek partnerships with local businesses, community organizations, and philanthropic entities to secure matching funds and in-kind contributions. These additional resources will complement the grant funds, enabling us to expand the scope and reach, ultimately benefiting a larger number of black-owned businesses and the community as a whole.

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 impact the scale and scope of the Black Equity University (BEU), potentially limiting the number of workshops, networking events, and consultation services provided to black-owned businesses. To account for partial funding, BlacQuity would prioritize essential activities, such as core training workshops, while seeking alternative sources of funding to supplement the shortfall. This might involve scaling back on non-essential activities or seeking partnerships with other organizations to leverage resources. While partial funding would necessitate adjustments, BlacQuity remains committed to delivering impactful programming to empower black-owned businesses and promote economic equity.

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 expected public benefit is a more vibrant and inclusive local economy. By empowering black-owned businesses, the program will contribute to job creation, economic growth, and a more diverse business landscape. This benefits not only the citizens and visitors of the Island by providing a wider array of goods and services but also the Town by fostering a thriving business community. Future capital projects or changes in service delivery scope might include expanding BEU to reach a larger audience, developing specialized training programs for existing businesses to continue education, or partnering with other organizations to enhance its impact. These changes could impact future operations and financial requests by necessitating additional resources to support growth and sustainability.

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

## C. FUNDING:

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

BlacQuity is currently funded through a combination of grants, donations, sponsorships, and fundraising events. We receive grants from various foundations and government agencies that support our initiatives aimed at empowering black-owned businesses. Additionally, we rely on donations and sponsorships from individuals, businesses, and community organizations that share our commitment to promoting economic equity. Our fundraising events, such as our Roots & Rivers festival and awareness campaigns, also play a crucial role in generating funds to support our programs and operations. Together, these funding sources enable us to continue our mission of uplifting and empowering black entrepreneurs in the community.

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

|    |                                     |    |                                             |
|----|-------------------------------------|----|---------------------------------------------|
|    | Government Sources                  | 35 | Private Contributions, Donations and Grants |
| 43 | Corporate Support, Sponsors         |    | Membership, Dues, Subscriptions             |
| 22 | Ticket Sales, or Sales and Services |    | Other                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. (100 words or less)

We proactively seek and secure funding from diverse sources to bolster our initiatives. This includes obtaining grants from private foundations aligned with our mission of promoting economic equity and empowerment. Corporate sponsorships are pivotal in providing financial backing and cultivating partnerships that amplify the impact of our programs. Equally crucial are individual donations from community members who share our vision, showcasing grassroots support and sustaining our organization. We also host engaging fundraising events like our Roots & Rivers festival and awareness campaigns, which not only raise funds but also spotlight our mission, drawing in potential

partners and supporters. This multifaceted funding strategy underpins our commitment to fostering the growth and stability of our programs dedicated to our mission.

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

We proactively seek and secure funding from diverse sources to bolster our initiatives. This includes obtaining grants from private foundations aligned with our mission of promoting economic equity and empowerment. Corporate sponsorships are pivotal in providing financial backing and cultivating partnerships that amplify the impact of our programs. Equally crucial are individual donations from community members who share our vision, showcasing grassroots support and sustaining our organization. We also host engaging fundraising events like our Roots & Rivers festival and awareness campaigns, which not only raise funds but also spotlight our mission, drawing in potential partners and supporters. This multifaceted funding strategy underpins our commitment to fostering the growth and stability of our programs dedicated to our mission.

#### D. FINANCIAL INFORMATION:

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

##### 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.

Profit and Loss Years Provided:

2023

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

Balance Sheet Years Provided:

2023

2023

2024

**E. MEASURING EFFECTIVENESS:**

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1. List any award amounts received in fiscal year 2023 and/or 2024.

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

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

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

BlacQuity measures the effectiveness of its overall activities and individual programs through a comprehensive evaluation process that includes both quantitative and qualitative assessments. We track key performance indicators such as the number of participants in our programs, their feedback and satisfaction levels, and the tangible outcomes achieved by the businesses we support. Additionally, we



conduct regular surveys, interviews, and focus groups to gather qualitative data on the impact of our initiatives on the participants and the community.

For individual programs like the Black Equity University (BEU) and the Get Seeded Pitch Night - BEU IGNITE, we use specific metrics related to program goals, such as the number of businesses launched or expanded, jobs created, revenue generated, and community engagement. We also assess the long-term sustainability and growth of the businesses that have gone through our programs.

By analyzing both quantitative and qualitative data, we are able to assess the effectiveness of our programs in achieving their intended outcomes, identify areas for improvement, and make data-driven decisions to enhance the impact of our initiatives. This evaluation process is essential for ensuring that we are meeting the needs of the community and fulfilling our mission of promoting, elevating, and empowering black-owned businesses for equity in our economy.

## F. EXECUTIVE SUMMARY

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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)*

We will ensure that our resources are optimized to yield the best possible results. It also enables us to adapt and refine our strategies based on the data we collect, enhancing our ability to achieve our objectives effectively and efficiently. Our objective of promoting economic equity and empowering black-owned businesses by maximizing the impact of our efforts from our resources.

Signature: Gwen Chambers

Title/Position: Executive Director

Mailing Address: PO Box 3132, Bluffton, SC 29910

Email Address: [gwen@blacquitysc.org](mailto:gwen@blacquitysc.org)

Phone Number: 843-707-5271

# **Fiscal Year 2025**

## **Affiliated Agency Grant Application**

**Organization Name:** Coastal Discovery Museum

**Project Name:** Museum Management Fee

### **Executive Summary**

The Coastal Discovery Museum is 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 1.4 million patrons, including over 1 million tourists. The Town of Hilton Head Island grant support 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 visitors and residents 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 it 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 2025

## Affiliated Agency Grant Application

Date Received: 01/30/2024

Time Received: 05:04 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### 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:**  
\$107,700.00

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. Over the past 16 years at Honey Horn, we grew to be the 3rd most popular museum in SC and the top third attraction on the island. The private/public partnership keeps the museum and grounds open free of charge as a public benefit to residents and visitors. We request support for three partial salaries, the Director of Finance 50%; Curator of Education 70%; Museum Educator 70%, so we can continue to provide these services and grow as a free museum with reduced cost educational programs.

## B. DESCRIPTION OF OPERATIONS:

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

Founded in 1985, 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. Beginning in 2007 when we opened at Honey Horn, a Town of Hilton Head Island property, we became more than just a museum. We have permanent exhibits and a constantly changing temporary gallery, but also feature 68 acres of natural beauty, including HHI's oldest buildings, ancient trees, open fields, and boardwalks extending into the marsh. CDM has become a favorite location for cultural festivals, weddings, special events, and our Farmers' Market. Visitors are inspired to learn about Hilton Head Island, participate in nature or history walks, talks, and site-specific programs along the boardwalks or in the Butterfly Enclosure. Guests can tour the Heritage Garden, the Camellia Garden, a replica shell ring, and visit our Marsh Tacky horse in residence. For the past ten years, the Museum has enhanced and expanded its offerings of Cultural and Eco-Tourism programs: Lowcountry critters, walks, talks, tours, workshops, temporary exhibitions, family fun day, history day, horseshoe and blue crab programs, dolphin tours, excursions to Daufuskie and Pinckney Islands, marine life presentations, birding, butterfly workshops, Native Islander demonstrations, Civil War programs, sweet grass basket-making classes, loggerhead sea turtle presentations and beach walks.

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 16 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 school programs.

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 is an increase of \$5,268 over our previous grant. This increase is directly tied to increased staffing costs for the three museum positions (tied to cost of living increases). If we were not fully funded we would continue our outside fundraising efforts to cover the difference, but ultimately our goal is to retain high-quality employees who serve the public and manage island visitors to our property, and Town support is a huge part of this success.

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, and this is further described under additional comments.

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:

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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 \$547,000; including ATAX, corporate, and federal grants. Our program, events, and rental revenues total \$335,000. Our store sales, membership, and individual donations total \$625,000. We receive \$102,432 in direct town funding. 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 Hilton Head Island.

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         | 3  | Membership, Dues, Subscriptions             |
| 10 | Ticket Sales, or Sales and Services | 20 | Other                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. (100 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.

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.

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 2021

FY 2020

FY 2022

FY 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:

FY 2021

FY 2020

FY 2022

January 23 - Balance Sheet

FY 2023

## E. MEASURING EFFECTIVENESS:

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1. List any award amounts received in fiscal year 2023 and/or 2024.

|      |              |                       |
|------|--------------|-----------------------|
| 2021 | \$75,000.00  | Museum Management Fee |
| 2020 | \$75,000.00  | Museum Management Fee |
| 2022 | \$92,775.00  | Museum Management Fee |
| 2023 | \$102,432.00 | 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 2023 we served over 115,000 people, over 90k on our Honey Horn property, including 6241 students (2,000 more than last year) 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 55,000 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.

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 16 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 visitors to cultural and ecotourism opportunities on the island. 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 received a certificate of excellence from TripAdvisor, we were named best museum of the Lowcountry by WTOC, and are recognized as one of 200 Affiliates of the Smithsonian Institution in the US and we are featured on the American Camellia Trail.

## F. EXECUTIVE SUMMARY

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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)*

The Coastal Discovery Museum is 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 1.4 million patrons, including over 1 million tourists. The Town of Hilton Head Island grant support 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 visitors and residents 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 it 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: Rexford C Garniewicz

Title/Position: President/CEO

Mailing Address: 70 Honey Horn Dr., HILTON HEAD ISLAND, SC 29926

Email Address: [rgarniewicz@coastaldiscovery.org](mailto:rgarniewicz@coastaldiscovery.org)

Phone Number: 843-415-8500

# **Fiscal Year 2025**

## **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 2023, we provided 200 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 25 has anticipated growth through the Association's programs. The funding request to the Town in FY25 is a (4.0%) increase from FY24. The program (9%) and event/other income (12%) are budgeted for increases. The overall FY 25 budget has a (8%) increase.

In the NRPA Performance review for both 2022 and 2023, 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 25.

# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/29/2024

Time Received: 01:46 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### 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:** \$3,692,995.00

**Grant Amount Requested:** \$1,167,366.00

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. Today, there are

over 600 members of the Hilton Head Island Senior Center involved in programs from fitness to social activities. The Association and the Town of Hilton Head Island will renew 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 17 full-time staff members, and 30 part-time (summertime/part-time is 85 plus). The Association provides over 200 programs and community events annually, with 376,432 participant visits. Through the Carmine's Scholarship Foundation, the Association has awarded over \$217,928 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 19,596 hours to the Association annually.

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

The funding received provides community-wide public recreation programs, community events, and effective management of facilities for the Town of Hilton Head Island and its residents. These efforts promote health, and wellness and build a sense of community through 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, Shelter Cove Community Park, Barker Field Extension, Barker Field, Lowcountry Celebration Park, Jarvis Creek Park, the Sailing and Rowing Center at Squire Pope Rd and through the extended MOU there will be 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. 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 played in our community by parks and recreation 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 bi-weekly the Association's payroll and weekly payable checks. 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. Capital Expenditures are reviewed by the Town and the Association is reimbursed for these expenses. 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.

|           |                                     |           |                                             |
|-----------|-------------------------------------|-----------|---------------------------------------------|
| <u>31</u> | Government Sources                  | <u>11</u> | Private Contributions, Donations and Grants |
| <u>12</u> | Corporate Support, Sponsors         | <u>46</u> | Membership, Dues, Subscriptions             |
| <u>0</u>  | Ticket Sales, or Sales and Services | <u>0</u>  | Other                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. (100 words or less)

The Association anticipates funds totaling \$2,525,607 from program fees, sponsorships, community events, and fundraising.

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

The Association anticipates funds totaling \$2,525,607 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:

Previous Year  
FY 21 and FY 22



FY 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:

FY 21

FY 20

FY 22

FY 23

#### E. MEASURING EFFECTIVENESS:

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1. List any award amounts received in fiscal year 2023 and/or 2024.

|      |                |                                               |
|------|----------------|-----------------------------------------------|
| 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 |

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 parks 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 2023, we provided 200 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 25 has anticipated growth through the Association's programs. The funding request to the Town in FY25 is a (4.0%) increase from FY24. The program (9%) and event/other income (12%) are budgeted for increases. The overall FY 25 budget has a (8%) increase.

In the NRPA Performance review for both 2022 and 2023, 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 25.

Signature: frank soule

Title/Position: executive director

Mailing Address: P.O. Box 22593, HILTON HEAD ISLAND, SC 29926

Email Address: frank.soule@islandreccenter.org

Phone Number: 843-683-7203

# **Fiscal Year 2025**

## **Affiliated Agency Grant Application**

**Organization Name:** Lowcountry Regional Transportation Authority

**Project Name:** Palmetto Breeze

### **Executive Summary**

An Effectiveness Measurement spreadsheet has been attached to this application.

# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/30/2024

Time Received: 02:34 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### A. SUMMARY OF GRANT REQUEST:

**ORGANIZATION NAME:** Lowcountry Regional Transportation Authority

**Project/Event Name:** Palmetto Breeze

**Contact Name:** Kristine Hepburn

**Title:** Director of Finance & Administration

**Address:** PO Box 2029, Bluffton, SC 29910

**Email Address:**  
khepburn@palmettobreezetransit.com

**Contact Phone:** 843-757-5784

**Total Budget:** \$5,648,499.00

**Grant Amount Requested:**  
\$253,595.00

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

The Lowcountry Regional Transportation Authority DBA Palmetto Breeze respectfully requests **\$203,595** for Fiscal Year 2025 in order to support the provision of public transportation throughout the Hilton Head Island/Bluffton Urbanized Area, including the Town of Hilton Head Island. This amount represents our best estimate of the amount that will be needed to match the Federal grant that funds the urban service and is based on a comparative analysis of past grant funding. The Federal Transit Administration (FTA) has not released the Federal Fiscal Year 2025 grant apportionments, which means that, while we do not anticipate a significant change, our request may be subject to amendment. Lowcountry RTA is also requesting a **\$50,000**

contribution toward the local match for the rural commuter program.

## B. DESCRIPTION OF OPERATIONS:

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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 the late 1970s. The South Carolina Department of Transportation (SCDOT) administers the 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 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 every one 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 has a total project cost of \$1,764,573. The grant funding for this project consists of \$1,115,337 in Federal funds and \$81,043 in State Mass Transit funds. This leaves a total of \$573,992 in local matching funds that must be raised for the project. 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 Year 2024) has a total project cost of \$2,600,280. The grant funding for this project consists of \$1,666,224 in Federal funds and \$327,987 in SMTF.

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 affect 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 reduced 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 benefit to the Island's citizens, visitors and the Town is the enhanced mobility and access to jobs provided by Palmetto Breeze's commuter services. With limited affordable workforce housing in the immediate area, the Island's economy depends heavily on cost-effective, daily commuter services for employees to access jobs for our hundreds of local employers. Additionally, the Breeze Trolley service has truly become an enhancement to the "Island Experience" for visitors, and is contributing to congestion reduction for all who use our roadways.

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 it's 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 around 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          | 0 | Private Contributions, Donations and Grants |
| 2  | Corporate Support, Sponsors | 0 | Membership, Dues, Subscriptions             |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. *(100 words or less)*

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, 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.

## 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 2019 & FY 2020  
FY 2020 & FY 2021  
Draft FY2022

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 2019 & FY 2020  
FY 2020 & FY 2021  
Draft FY2022

#### E. MEASURING EFFECTIVENESS:

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1. List any award amounts received in fiscal year 2023 and/or 2024.

|      |              |                 |
|------|--------------|-----------------|
| 2021 | \$225,165.00 | Palmetto Breeze |
| 2022 | \$282,404.00 | Palmetto Breeze |
| 2023 | \$282,404.00 | Palmetto Breeze |
| 2024 | \$277,842.00 | Palmetto Breeze |

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

Funds received in 2023 and currently receiving in 2024 were utilized as the local match portion of our operating budgets for our Palmetto Breeze Transit daily commuter services and our seasonal Breeze Trolley services.

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 fundinh through the State and Federal departments oif Transportation requires the provision of a local match in order for those funds to be completely allocxtaed to the LRTA. So, in short, without the Town's local match, the provision of these regionally significant services would be nearly impossible.

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 (which has remained remarkably constant despite the COVID-9 pandemic) as well as our Breeze Trolley ridership which experienced an enormous increase in 2021 over previous seasons and has remained constant since than. Our interal key performance indicators include safety performance, passenger satisfaction, maintenance achievements, public support, social media imapcts, and our overall image within the Hilton Head isand and the surrounding Lowcountry communities.

## F. EXECUTIVE SUMMARY

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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: Kristine Hepburn

Title/Position: Director of Finance and Administration

Mailing Address: PO Box 2029, Bluffton, SC 29910

Email Address: khepburn@palmettobreezetransit.com

Phone Number: 843-757-5784

# **Fiscal Year 2025**

## **Affiliated Agency Grant Application**

**Organization Name:** Memory Matters

**Project Name:** Memory Matters Programs and Services

### **Executive Summary**

An Effectiveness Measurement spreadsheet has been attached to this application.



# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/26/2024

Time Received: 03:25 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### A. SUMMARY OF GRANT REQUEST:

**ORGANIZATION NAME:** Memory Matters

**Project/Event Name:** Memory Matters Programs and Services

**Contact Name:** Stacy Floyd

**Title:** Development Director

**Address:** 117 William Hilton Parkway, Hilton Head Island, SC 29926

**Email Address:**

stacy@mymemorymatters.org

**Contact Phone:** 843-842-6688

**Total Budget:** \$1,461,724.00

**Grant Amount Requested:**  
\$50,000.00

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

Funding is requested to support Memory Matters education/wellness events and programs for families facing Alzheimer's Disease and Related Dementia (ADRD) in the Town of Hilton Head. The 2023-2025 SC Statewide Plan to Address ADRD states, "There are an estimated 197,000 caregivers in South Carolina providing almost 300 million hours of unpaid care. That unpaid care provided by family members or friends is valued at over \$4.4 billion. Caregivers of people with dementia indicate substantial financial, emotional, and physical health difficulties." Providing education for caregivers and comprehensive dementia care and support will directly impact the caregiver and individual living with ADRD.

## B. DESCRIPTION OF OPERATIONS:

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

Memory Matters is the only local non-profit organization serving individuals and families affected by Alzheimer's Disease and Related Dementias (ADRD) in southern Beaufort County. Caring for a loved one diagnosed with ADRD is overwhelming for most families who don't have the coping skills to manage the journey on their own. The cornerstone of Memory Matter's mission is to provide support and services for family caregivers and individuals affected by ADRD. For 26 years, Memory Matters has provided this support in Hilton Head and surrounding communities through its programs and services including free memory screenings, community and caregiver education, support groups, respite care day programs and care planning. Beaufort County has seen a 354% increase in documented dementia cases since 2000. (SC Alzheimer's Disease Registry) In 2023, Memory Matters served more than 5,000 Beaufort and Jasper County residents through community programs, education and outreach efforts. This grant would provide public function to the Town by creating an opportunity for Memory Matters to offer free baseline memory screenings which can lead to earlier diagnosis and access to treatments and services. This program will also increase access to underserved Hilton Head Island residents by providing fee assistance to attend dementia support programs and services. It will help Memory Matters reach more families affected by ADRD and provide comprehensive dementia resources, guidance, support, programs and services decreasing burden on healthcare and emergency services, ultimately creating a healthier community.

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

Grant funds would be used to provide fee assistance for Hilton Head families in need of financial support to attend the Memory Care Adult Day Respite Program. We assist with fees up to 90% and in some cases 100%. The Memory Care Adult Day Respite Program provides participants with ADRD a social day with interactive activities and a nutritious meal while the caregiver receives valuable respite time for self-care, medical and legal appointments, rest, etc. Funds will also support education and outreach programs such as The Savvy Caregiver, Friday's for Caregivers, community education events, and support groups. These programs are designed to provide knowledge and skills to support caregivers and help improve quality of life for both the caregiver and individual with ADRD. Funds will help provide free memory screenings in the Town of Hilton Head. Free baseline memory screenings are often our initial contact with a family in need of guidance and resources as they navigate their journey with ADRD and their physician. Memory Matters builds relationships and assists families throughout the disease process. Free Memory Screenings lead to earlier diagnosis and access to treatments and resources. Community education and outreach are also important components of this project to bring information to the community about Memory Matters programs and services and to provide hope and support for families affected by ADRD living in the Town of Hilton Head. We seek funding year round through private donations, foundations, grants, and events to support the remainder of the project budget.

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 may reduce opportunities for residents with ADRD to benefit from programs such as participating in the fee assistance program to attend the Memory Care Adult Day Respite Program. If partial funding is received it could reduce the number of days a participant can attend the respite program. We will not turn anyone away, but it may mean the difference of attending one day per week

instead of two, until more funding is secured. We will continue providing community and caregiver education, however, partial funding may mean less opportunities to bring the services into the community.

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 expected public benefit Memory Matters will make through this project is to improve the lives of vulnerable individuals affected by ADRD and their caregivers by increasing access to free memory screenings, dementia care support and resources for the underserved in our community and raise awareness throughout the community about our programs and services within the Town. We will increase collaboration and partnerships with other non-profits, faith-based, and health organizations serving low-income communities. By tracking and reporting data collected during this project we will learn more about the needs for dementia care in the underserved populations in our area.

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

Memory Matters evidence based programs are a proven resource for Hilton Head Island residents faced with ADRD. They improve quality of life for seniors, increase self-efficacy in managing one's health and increase independence. Memory Matters also improves the mental health of caregivers and has positive effects on depression by offering the Savvy Caregiver, a program designed to empower caregivers with skills and knowledge to help them better care for themselves and their loved one with ADRD.

## C. FUNDING:

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

Memory Matters seeks and receives funding year-round through various sources including individual donations, special events, program fees and grants. Memory Matters prepares financially for contingencies to maintain programs and services for those affected by ADRD during difficult times such as recessions, natural disasters like hurricanes and most recently, the Covid Pandemic. We have weathered all these situations over the past 26 years and after each occurrence have been able to continue to grow programs and services driven by increased demand and need in our HHI community.

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

|     |                                     |     |                                             |
|-----|-------------------------------------|-----|---------------------------------------------|
| 1%  | Government Sources                  | 73% | Private Contributions, Donations and Grants |
| 3%  | Corporate Support, Sponsors         |     | Membership, Dues, Subscriptions             |
| 23% | Ticket Sales, or Sales and Services |     | Other                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. *(100 words or less)*

Church Mouse Thrift Store-\$1,660 received.

Hilton Head Fire Department-\$5,000 received.

Community Foundation of the Lowcountry-\$44,000 received.

Women in Philanthropy-\$25,000 submitted.

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

Church Mouse Thrift Store-\$1,660 received.

Hilton Head Fire Department-\$5,000 received.

Community Foundation of the Lowcountry-\$44,000 received.

Women in Philanthropy-\$25,000 submitted.

#### D. FINANCIAL INFORMATION:

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Fiscal Year Disclosure: Start Month: January 1, 2024 End Month: December 31, 2024

##### 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**

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:

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1. List any award amounts received in fiscal year 2023 and/or 2024.

|      |             |                                                                          |
|------|-------------|--------------------------------------------------------------------------|
| 2023 | \$25,000.00 | Mobile MoCA's-Free Baseline Memory Screening for Underserved Communities |
| 2023 | \$3,000.00  | Community Education and Outreach                                         |
| 2023 | \$2,000.00  | 2023 Memories Do Matter Speaker Series                                   |
| 2023 | \$10,000.00 | Savvy Caregiver Program-Caregiver Education                              |
| 2023 | \$5,000.00  | Savvy Caregiver Program-Caregiver Education                              |
| 2023 | \$18,000.00 | Memory Care Day Program Meals                                            |
| 2023 | \$5,000.00  | Volunteer Support                                                        |
| 2023 | \$20,000.00 | Fee Assistance to Attend the Memory Care Day Program                     |
| 2023 | \$15,000.00 | Memory Care Day Program Expansion in Bluffton                            |
| 2023 | \$7,500.00  | Fee Assistance to Attend the Memory Care Day Program                     |
| 2023 | \$2,000.00  | Memory Care Day Program                                                  |
| 2023 | \$13,000.00 | Memory Care Day Program                                                  |
| 2023 | \$2,500.00  | Community Education and Outreach                                         |
| 2023 | \$44,000.00 | Memory Care Day Program                                                  |
| 2023 | \$10,000.00 | Community Education and Outreach                                         |

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

The funds above were used to support the delivery of Memory Matters Programs and Services and connect resources and support with



families affected by ADRD in our local community.

In 2023 Memory Matters was able to achieve the following:

- 458 Free base-line Memory Screenings (MoCA's) were administered by staff.
- 255 MoCA's were conducted the in Greater Beaufort County Community and 203 were conducted on HHI.
- More than 200 caregiver resource meetings were conducted.
- More than 100 community education presentations were conducted.
- 135 attended Brain Boosters classes.
- 65 individuals attended the Savvy Caregiver training program.
- 111 individuals participated in support groups in 2023.
- More than 5,000 community members were reached through community education, programs, and services.
- 75 Individuals were served in the Memory Care Adult Day Respite Program compared to

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

These grants had a significant impact in the community by providing support for Memory Matters to increase awareness and access to Memory Matters resources in low-income communities in our geographic area. Offering free base-line memory screenings in the community helped us reduce travel barriers and assist with establishing trust in underserved communities that are not as familiar with Memory Matters services. We used social media and traditional advertising to help raise awareness for the programs and services Memory Matters offers. This project helped Memory Matters increase access to dementia care support and resources in our community and raised

awareness throughout the community about our programs and services.

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

Memory Matters tracks attendance in all programs and classes. We evaluate and measure effectiveness based on feedback from participants, caregivers, volunteers, community partners, and staff members. We have also implemented an evidence-based software program (BRI Care Consultation) which will help us with tracking overall activity and follow up with individuals after initial contact often from taking a MoCA and help us build relationships, offer support and resources in rural communities by eliminating the transportation barrier, and much more.

## F. EXECUTIVE SUMMARY

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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: Stacy Floyd

Title/Position: Development Director

Mailing Address: 117 William Hilton Parkway, Hilton Head Island, SC 29926

Email Address: [stacy@mymemorymatters.org](mailto:stacy@mymemorymatters.org)

Phone Number: 843-842-6688

# Fiscal Year 2025

## 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 management agreement will take care of staff, park improvements / maintenance as well as Park utilities. The following assessment will highlight the work of the Executive Director from the previous year with the \$105,000 reflecting salary and benefits.

### Strategic Focus and Significant Achievements

1. Due to our inclusion in the group of organizations who received funding from the African American Cultural Heritage Action Fund of the National Trust for Historic Preservation, HMFP was invited to make a pitch from the Mellon Foundation through their Mellon Monuments program. The organization received **\$2.5 Million** that will be used to implement the Freedom Plaza area, the Interpretive Trail and necessary infrastructure for the Interpretive Center.

#2. Codified the official M.O.U. with the Town for **ten years** at \$105,000 each year.

#3. We moved into the third year of our "QR code stations" partnership with the Town of Hilton Head Island Office of Cultural Affairs. The three stations have yielded **2,695 scans** since January 2023 (over **7,700 total**) with tourists ranging from 35 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, Poland, Romania, Sierra Leone, Switzerland and the Ukraine.

#4. Securing the jointly owned, Town and County, Beach City Road parcels to support the

existing Master Plan elements and naturally expand the Park site in the near future. This not only gives us the parcels for the parking area and Classroom / Lab section, but also brings most of the property that contains the rest of the “historic home imprint” under our control.

#5. Continuing to provide high level programming that attracts new visitors to the Hilton Head Island / Beaufort County area. We reached **850** school aged children with The Griot’s Corner literacy program in the Park and at area schools. Additionally, we touched 125 children through the Ho’Well Do You Know Hilton Head History Hike; The Holiday Nights and Lights continues to be a key event for HMFP with **3,000** people in attendance 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, Mississippi, New York, North Carolina, Ohio, Pennsylvania and Tennessee; The Freedom Day program highlighting the Black History Month theme of Black Resilience and focusing on the life and work of Robert Smalls had **275** people in attendance; HMFP welcomed **1,400** people back to the Park for the annual Juneteenth celebration at the Park on June 17th. The states represented at the Juneteenth Event were Alabama, Florida, Georgia, Kentucky, Michigan, New York, New Jersey, North Carolina, Ohio, Pennsylvania, and Virginia. The accompanying sleepover in the Park on the 15th with Joseph McGill from the Slave Dwelling Project continues to grow with **25** people camping in the Park. The Juneteenth Drum Circle that kicked off the Festival on June 16th, brought **225** people to the Park to start the celebration.

#6. Mitchelville was highlighted in major American periodicals such as USA Today and Travel and Leisure Magazine. The New York Times listed Mitchelville as one of the **"Eight U.S. Sites Illuminating Black History."**

#7. HMFP is working to secure a boulder from the Old Yagala area of **Sierra Leone** , due to its significance as a bastion of resistance to the slave trade in that country. The Gullah community that made up the population of Mitchelville were brought to the South Carolina coast, from countries such as Sierra Leone, due to their expertise in cultivating rice. Sierra Leone has become an important destination as many African Americans are tracing their roots back to that country. In the last 30 years, there have been several pilgrimages of African descendants traveling to Sierra Leone to discover linkages to their ancestral homeland. The pilgrimages, in fact, have established strong ties between Sierra Leone and coastal South Carolina, where strong similarities in language, food, crafts, spirituality, songs and other cultural beliefs have been discovered. This boulder will be prominently placed in the Freedom Plaza to represent this natural connectivity between the people of Sierra Leone and those of the Gullah Geechee Heritage Corridor. HMFP acknowledges the power associated with this symbol, as the descendant population of the Lowcountry will be able to touch a piece of their ancestral land. The plaza will be large enough to stage small gatherings, but intimate enough to provide space for reflection and rest. A local HMFP team is corresponding with the U.S. ambassador to Sierra Leone, Sidique Abou-Bakarr Wai and others to secure the

boulder. The organization is also leveraging the local Rotary and reaching out to the Freetown Rotary.

#8. Planning has completed for the installation of "**Ghosted House Structures and the Church / Archaic Reflection Area**" permanent fixtures in the Park. These will be the first key features installed at HMFP and should start in the first quarter of 2024.

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

#10. HMFP hired a Director of Finance which is its 3rd full time staff position.

# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/30/2024

Time Received: 03:25 PM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### 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:** \$977,000.00

**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 moves into a capital campaign 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 as one of the eight sites illuminating Black History last year by **The New York Times**, articles in **Travel + Leisure** magazine, exposure to national museum organizations and conferences and securing important funding from entities such as the **State of South Carolina, Watterson Brands** and the **Mellon Foundation**.

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.

|     |                                     |     |                                             |
|-----|-------------------------------------|-----|---------------------------------------------|
| 54% | Government Sources                  | 26% | Private Contributions, Donations and Grants |
| 13% | Corporate Support, Sponsors         | 2%  | Membership, Dues, Subscriptions             |
| 5%  | Ticket Sales, or Sales and Services |     | Other                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. *(100 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 and its campaign firm The Compass Group, are targeting several high value individual donors and organizations a

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.

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#### D. FINANCIAL INFORMATION:

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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:

2021

2020

2022

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:

2021

2020

2022

2023

## E. MEASURING EFFECTIVENESS:

---

1. List any award amounts received in fiscal year 2023 and/or 2024.

|      |              |                    |
|------|--------------|--------------------|
| 2021 | \$105,000.00 | Executive Director |
| 2022 | \$105,000.00 | Executive Director |
| 2023 | \$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 36 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 \$5 Million in Capital funds in 2023 and the organization has raised \$8 Million in pledges / funding in hand toward the overall goal of \$22.8 Million. The assets of the organization currently stand at the \$3.2 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(1,400 participants in 2023) and Holiday Nights and Lights (3,000 participants in 2023) 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 2024. 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. In addition, the codes were scanned by tourists from Australia, Canada, Germany, Poland, Romania, Uganda, Switzerland and the Ukraine. Mitchelville was highlighted in major American periodicals such as USA Today, Travel and Leisure Magazine and the New York Times.

HMFP will have three different capital projects in motion in 2024 that will move the Park closer to completion.

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](http://exploremitchelville.org) website, Instagram and YouTube. Staff effectiveness is measured through employee evaluation processes that happen throughout the fiscal year.

## F. EXECUTIVE SUMMARY

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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, 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 management agreement will take care of staff, park improvements / maintenance as well as Park utilities. The following assessment will highlight the work of the Executive Director from the previous year with the \$105,000 reflecting salary and benefits.

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1. Due to our inclusion in the group of organizations who received funding from the African American Cultural Heritage Action Fund of the National Trust for Historic Preservation, HMFP was invited to make a pitch from the Mellon Foundation through their Mellon Monuments program. The organization received **\$2.5 Million** that will be used to implement the Freedom Plaza area, the Interpretive Trail and necessary infrastructure for the Interpretive Center.

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Poland, Romania, Sierra Leone, Switzerland and the Ukraine.

#4. Securing the jointly owned, Town and County, Beach City Road parcels to support the existing Master Plan elements and naturally expand the Park site in the near future. This not only gives us the parcels for the parking area and Classroom / Lab section, but also brings most of the property that contains the rest of the “historic home imprint” under our control.

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#7. HMFP is working to secure a boulder from the Old Yagala area of **Sierra Leone** , due to its significance as a bastion of resistance to the slave trade in that country. The Gullah community that made up the population of Mitchelville were brought to the South Carolina coast, from countries such as Sierra Leone, due to their expertise in cultivating rice. Sierra Leone has become an important destination as many African Americans are tracing their roots back to that country. In the last 30 years, there have been several pilgrimages of African descendants traveling to Sierra Leone to discover linkages to their ancestral homeland. The pilgrimages, in fact, have established strong ties between Sierra Leone and coastal South Carolina, where strong similarities in language, food, crafts, spirituality, songs and

other cultural beliefs have been discovered. This boulder will be prominently placed in the Freedom Plaza to represent this natural connectivity between the people of Sierra Leone and those of the Gullah Geechee Heritage Corridor. HMFP acknowledges the power associated with this symbol, as the descendant population of the Lowcountry will be able to touch a piece of their ancestral land. The plaza will be large enough to stage small gatherings, but intimate enough to provide space for reflection and rest. A local HMFP team is corresponding with the U.S. ambassador to Sierra Leone, Sidique Abou-Bakarr Wai and others to secure the boulder. The organization is also leveraging the local Rotary and reaching out to the Freetown Rotary.

#8. Planning has completed for the installation of **"Ghosted House Structures and the Church / Archaic Reflection Area"** permanent fixtures in the Park.

These will be the first key features installed at HMFP and should start in the first quarter of 2024.

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

#10. HMFP hired a Director of Finance which is its 3rd full time staff position.

Signature: Ahmad T Ward

Title/Position: Executive Director

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

Email Address: [award@exploremitchelville.org](mailto:award@exploremitchelville.org)

Phone Number: 843-255-7301

# **Fiscal Year 2025**

## **Affiliated Agency Grant Application**

**Organization Name:** Sea Turtle Patrol Hilton Head Island

**Project Name:** Town Affiliated

### **Executive Summary**

An Effectiveness Measurement spreadsheet has been attached to this application.

This is the first submission for Town Affiliated Agency funding for Sea Turtle Patrol HHI. An ATAX Effective measurement form has been submitted as well as an executive summary. For further review, the results of the USCB Center for Strategic Planning document is also attached.

#### **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 programming was enhanced in 2022 with the first ATAX grant award for marketing. 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 almost nonexistent. Sea turtle nesting is unique to destinations that border the Ocean and 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 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 organizations through grant awards and collaboration. Although ATAX grants and restricted local grants have given STPHHI an elevated marketing platform, the operational budget has lagged behind. With the help of the Town, STPHHI will be able to sustain a well-rounded program.

“As STPHHI continues to draw awareness and attention to activities on the beaches of Hilton Head, the theme NEXT GENERATION has been chosen for the 2024 nesting season. We believe that we can make an impression on the next generation of visitors to Hilton Head by expressing our passion for the sea turtles and the environment.”- Amber Kuehn

# Fiscal Year 2025

## Affiliated Agency Grant Application

Date Received: 01/30/2024

Time Received: 11:10 AM

By: Online Submittal

*Applications will not be accepted if submitted after 4 pm on January 31, 2024*

### 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:** \$216,000.00

**Grant Amount Requested:**  
\$73,480.00

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

STPHHI has progressed from no funding in 2017 to an operational budget that is necessary to serve the Town of HHI annually with an advanced sea turtle nest monitoring program. This 2024.2025 grant would be allocated to assistance with the Executive Director salary (70%) and the part-time Administrative Consultant salary (70%) to offset operational expenses. Additionally, STPHHI would like to purchase a 4x4 vehicle that would be used for the SeaTurtle Patrol Experience Program (2024-) and for the 2025 beach renourishment. With this support, STPHHI will be able to utilize more unrestricted funds to enhance operations.

## B. DESCRIPTION OF OPERATIONS:

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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). Historically, the organization had been consistently supported through Town budget funding acquired by another Town Affiliated agency thru 2016. All vehicles and salary were paid for with Town funds. STPHHI was re-organized in 2017 without the financial support of the Town's Affiliated Agency status. In recent years, ATAX funding has assisted with marketing for sea turtle conservation awareness, but operational expenses do not qualify for this grant. 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 this level of growth. 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/Operational chapter 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

(\$42,000) and the part time administrative consultant annual stipend (\$14,400). Additionally, a 4x4 side-by-side vehicle with climate control and safety equipment would be purchased to provide the STP Experience Program with a vehicle capable of carrying passengers to observe the beach operations of STPHHI nest monitoring. This vehicle will also be used during night sea turtle patrol beach renourishment efforts. Having managed the sea turtle operation during the 2016 beach renourishment, STPHHI director has first hand experience concerning the appropriate equipment necessary. The vehicles provided for the last renourishment were consistently getting stuck in the loose sand and a truck is not maneuverable over the pipes. These patrols are run every hour throughout the night to protect sea turtles intending to nest in the construction zone. Overall, financial support from the Town will allow the organization to access more unrestricted funds for operational expenses that would not normally be available. Examples of possible future operational funding designations: Contribution to rent for the future operations facility, expansion of educational programming equipment, etc.

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 funding is not received, STPHHI will strive to continue to operate a comprehensive nest monitoring program, but will need to find a manageable compromise in association 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 to include the community and visitors that the organization has implemented is ancillary. If the extra programming costs cannot be accommodated with our operational budget, we will need to eliminate them or ask the executive director to be a volunteer.

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 and USCB Center for Strategic Planning have recently completed a 5 year Strategic Plan for STPHHI 2024 - 2028 (results attached to this application). Among members and stakeholders surveyed, an overwhelming indication that the need for an operational facility was identified. This will require a large capital fundraising initiative. STPHHI endeavors to incorporate a hospitality component into this future facility to accomodate community and visitor education. Another goal is to provide a Sea Turtle Patrol Experience on the beach for Sea Turtle Friendly Certified Organizations to offer to tourists, incentivising island resorts to cultivate and advertise their sustainability efforts.

5. Additional comments. (250 words or less)

Sea Turtle Patrol HHI has grown exponentially since 2017. In order to maintain this momentum, full time attention must be given to the operation that exists outside of daily beach monitoring. Outreach via social media has been significant and visibility for the program acting as a representative of HHI is more evident with the recent involvement from the Chamber. In order to compensate management and provide an outlet for the community and visitors to experience our operation, an increase in the operational budget is necessary. With the addition of a \$30,000 DNA analysis annual cost, STPHHI is further away from a sustainable operations budget to include programming. Hilton Head Island boasts a very high level of regard for the environment. STPHHI has done its best to keep up with operational costs and has taken every opportunity to fundraise, representing HHI well until returning to headquarters, a tent in the Islander's Beach Parking lot.

**C. FUNDING:**

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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 2024). 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. Salaries and equipment qualify as an operational expense and are not funded through the CFL or nonprofit local grant funded donations. STPHHI strives to apply for all funding available, complying with the restrictions associated with the donation.

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

|     |                                     |     |                                             |
|-----|-------------------------------------|-----|---------------------------------------------|
| 33% | Government Sources                  | 65% | Private Contributions, Donations and Grants |
| 2%  | Corporate Support, Sponsors         |     | Membership, Dues, Subscriptions             |
|     | Ticket Sales, or Sales and Services |     | Other                                       |

3. Please provide a summary of previous governmental funding applied for, or received, for fiscal year 2024 and fiscal year 2025. (100 words or less)

This request for Town Affiliated Agency affiliation and assistance in offsetting operational expenses with designated funding for partial salaries and equipment stands alone. Salaries are included in the STPHHI operational budget and draw from individual unrestricted donations. Grants from local organizations cannot be used categories such as salaries, only for specific projects. STPHHI needs the support of the Town. Sea turtle monitoring programs are governed, but not funded by SCDNR. With beach renourishment approaching in 2025, a new level of collaboration with the Town of HHI is anticipated.

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

This request for Town Affiliated Agency affiliation and assistance in offsetting operational expenses with designated funding for partial salaries and equipment stands alone. Salaries are included in the STPHHI operational budget and draw from individual unrestricted donations. Grants from local organizations cannot be used categories such as salaries, only for specific projects. STPHHI needs the support of the Town. Sea turtle monitoring programs are governed, but not funded by SCDNR. With beach renourishment approaching in 2025, a new level of collaboration with the Town of HHI is anticipated.

#### D. FINANCIAL INFORMATION:

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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

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

2021.2022

**E. MEASURING EFFECTIVENESS:**

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1. List any award amounts received in fiscal year 2023 and/or 2024.

2024    \$70,000.00    Next Generation STPHHI

2023    \$64,500.00    The Unofficial Mascot for Beach Preservation

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

100% of all funds recieved through ATAX have been spent on marketing. The response has been overwhelming as expected. The financial needs of STPHHI extend beyond marketing. STPHHI is the only organization on the island that is permitted to monitor and collect sea turtle nest monitoring data that interests residents and visitors and is required for beach renourishment permitting. STPHHI is also the only organization qualified to give presentations to the schools concerning these permitted activities on the beach to include the highlights/results from each season. STPHHI has outgrown its current location and will be striving to accomodate vehicles, office space, and hospitatlity/reception, all of which are operational expenses.

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

Through assistance in marketing funds (ATAX), educational videos

were produced, outdoor sea turtle sculptures have been placed (Airport, Sandbox, Coligny), red flashlights have been distributed, improvements in branding and a new website is in process, signage has been produced, a free weekly public turtle talk has been implemented (June-August) and advertised, and results/highlights of the season have been shared via social media. Appearances on social media influencers pages and the Today Show also reflect the effort that STPHHI has made to promote HHI. STPHHI also has first hand knowledge of all issues on the beach regarding stranding of endangered sea turtles, misorientation of sea turtle hatchlings, and federally protected marine mammal strandings. Fielding emails/calls from the public for response and informational awareness has become a full time effort.

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

Social media analytics are provided by the digital platform. Zip codes and #attendees are collected at the physical programs such as turtle talks. The Nest Dedication fundraising program is sold out each season. The increased amount of emails requesting interaction with STPHHI is substantial. QR codes with a link to the website have been implemented on signage and the beach patrol truck to track area codes of interested passers-by. If goals are met, visits to the future STPHHI hospitality center will be recorded and participation with the Sea Turtle Experience offering will be logged.

## F. EXECUTIVE SUMMARY

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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.

This is the first submission for Town Affiliated Agency funding for Sea Turtle Patrol HHI. An ATAX Effective measurement form has been submitted as well as an executive summary. For further review, the results of the USCB Center for Strategic Planning document is also attached.

### 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 was enhanced in 2022 with the first ATAX grant award for marketing. 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 almost nonexistent. Sea turtle nesting is unique to destinations that border the Ocean and 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 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 organizations through grant awards and collaboration. Although ATAX grants and restricted local grants have given STPHHI an elevated marketing platform, the operational budget has lagged behind. With the help of the Town, STPHHI will be able to sustain a well-rounded program.

“As STPHHI continues to draw awareness and attention to activities on the beaches of Hilton Head, the theme NEXT GENERATION has been chosen for the 2024 nesting season. We believe that we can make an impression on the next generation of visitors to Hilton Head by expressing our passion for the sea turtles and the environment.”- 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