

COUNTY COUNCIL OF BEAUFORT COUNTY
ADMINISTRATION BUILDING
100 RIBAUT ROAD
POST OFFICE DRAWER 1228
BEAUFORT, SOUTH CAROLINA 29901-1228
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STEWART H. RODMAN
VICE CHAIRMAN

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LAURA L. VON HARTEN

GARY KUBIC
COUNTY ADMINISTRATOR

BRYAN J. HILL
DEPUTY COUNTY ADMINISTRATOR

JOSHUA A. GRUBER
COUNTY ATTORNEY

SUZANNE M. RAINEY
CLERK TO COUNCIL

AGENDA
FINANCE COMMITTEE
Monday, April 28, 2014
1:00 p.m.
Executive Conference Room
Administration Building, Government Center

Committee Members:

Rick Caporale, Chairman
Steve Fobes, Vice Chairman
Brian Flewelling
William McBride
Stu Rodman
Jerry Stewart

Staff Support

Alicia Holland, Chief Financial Officer

1. CALL TO ORDER – 1:00 P.M.
2. PRESENTATION / SANTA ELENA PROJECT
3. CONSIDERATION OF AN ORDINANCE TO ESTABLISH MAGISTRATE SALARIES
4. CONSIDERATION OF REAPPOINTMENTS AND APPOINTMENTS
 - A. Accommodations Tax Board
5. PRESENTATIONS / FY 2015 BUDGET PROPOSALS – 2:00 P.M.
 - A. Clerk of Court (request) (family court iv-d)
 - B. Lady's Island/St. Helena Island Fire District (request)
 - C. Sheldon Fire District (request)
 - D. Daufuskie Island Fire District (request)
 - E. Burton Fire District (request)
 - F. Bluffton Township Fire District (request) (fy 2015 fire district millage summary)
 - G. Solicitor (request) (presentation) (balance sheet) (income statement)
 - H. Voter Registration (request) (presentation)
6. ADJOURNMENT

2014 Strategic Plan: Committee Assignments

Budget Document/Process and Financial Reporting: Revision
Mitchelville Historic Site Development: Funding
Reserve Policy



FY2015 Elected Officials Budget Combined Clerk of Court 1030 and Family Court 1031

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
General Fund Revenues	<u>\$ 594,840</u>	<u>\$ 673,419</u>	<u>\$ 655,500</u>	<u>\$ 615,500</u>
Expenditures				
Personnel	732,533	825,461	825,461	873,610
Purchased Services	227,748	284,150	267,950	285,150
Supplies	24,309	30,907	33,207	30,907
Capital	-	140,000	138,649	-
Subsidies	-	-	-	-
Contingency	-	-	-	-
Unclassified	-	-	-	-
Transfers Out ¹	-	-	-	-
Total Expenditures	<u>\$ 984,590</u>	<u>\$ 1,280,518</u>	<u>\$ 1,265,267</u>	<u>\$ 1,189,667</u>

FTEs: 21

FY2015 Elected Officials Budget Clerk of Court 1030

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
General Fund Revenues	\$ 203,794	\$ 276,419	\$ 279,000	\$ 239,000
Expenditures				
Personnel	573,446	639,744	639,744	646,938
Purchased Services	212,618	240,000	227,800	240,500
Supplies	13,156	18,200	20,500	18,200
Capital	-	140,000	138,649	-
Subsidies	-	-	-	-
Contingency	-	-	-	-
Unclassified	-	-	-	-
Transfers Out ¹	-	-	-	-
Total Expenditures	\$ 799,220	\$ 1,037,944	\$ 1,026,693	\$ 905,638

FTEs: 15

1 -N/A

FY2015 Elected Officials Budget Family Court 1031

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
General Fund Revenues	<u>\$ 391,046</u>	<u>\$ 397,000</u>	<u>\$ 376,500</u>	<u>\$ 376,500</u>
Transferred from Unit Cost	13,420			44,980
Expenditures				
Personnel	159,088	185,717	185,717	226,672
Purchased Services	15,130	44,150	40,150	44,650
Supplies	11,152	12,707	12,707	12,707
Capital	-	-	-	-
Subsidies	-	-	-	-
Contingency	-	-	-	-
Unclassified	-	-	-	-
Transfers Out ¹	-	-	-	-
Total Expenditures	<u>\$ 185,370</u>	<u>\$ 242,574</u>	<u>\$ 238,574</u>	<u>\$ 284,029</u>

FTEs: 6

1 -N/A

FY2015 Elected Officials Budget Clerk of Court IV-D Unit Cost 2101

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
Special Revenues	<u>\$ 250,805</u>	<u>\$ 250,000</u>	<u>\$ 250,000</u>	<u>\$ 250,000</u>
Expenditures				
Personnel	194,837	201,600	201,600	156,620
Purchased Services	39,316	44,100	44,100	44,100
Supplies	3,232	4,300	4,300	4,300
Capital	-	-	-	-
Subsidies	-	-	-	-
Contingency	-	-	-	-
Unclassified	-	-	-	-
Transfers Out ¹	<u>13,420</u>	<u>-</u>	<u>-</u>	<u>44,980</u>
Total Expenditures	<u>\$ 250,805</u>	<u>\$ 250,000</u>	<u>\$ 250,000</u>	<u>\$ 250,000</u>

FTEs: 3

1 -End of Fiscal Year Remaining Balance is Transferred to General Fund

LADY'S ISLAND/ST. HELENA FIRE DISTRICT
FY 2015 BUDGET

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
Revenues				
Ad Valorem Taxes	\$ 4,850,002	\$ 4,757,456	\$ 4,390,000	\$ 4,764,037
Municipal Contracts	<u>106,151</u>	<u>106,151</u>	<u>103,335</u>	<u>103,335</u>
Total Revenues	<u><u>4,956,153</u></u>	<u><u>4,863,607</u></u>	<u><u>4,493,335</u></u>	<u><u>4,867,372</u></u>
Expenditures				
Salaries	2,965,454	3,106,988	3,106,988	3,130,692
Benefits	1,276,976	1,393,674	1,385,034	1,494,312
Purchased Services	323,725	363,596	174,936	182,796
Supplies	<u>-</u>	<u>-</u>	<u>197,300</u>	<u>197,300</u>
Transfers Out				
Total Expenditures	<u><u>4,566,155</u></u>	<u><u>4,864,258</u></u>	<u><u>4,864,258</u></u>	<u><u>5,005,100</u></u>
Increase (Decrease) in Fund Balance	389,998	(651)	(370,923)	(137,728)
Fund Balance, Beginning	<u>\$ 875,770</u>	<u>\$ 1,265,768</u>	<u>\$ 1,265,117</u>	<u>\$ 894,194</u>
Fund Balance, Ending	<u><u>\$ 1,265,768</u></u>	<u><u>\$ 1,265,117</u></u>	<u><u>\$ 894,194</u></u>	<u><u>\$ 756,466</u></u>
FTEs:				
Administrative	1	1	1	1
Firemen	<u>64</u>	<u>64</u>	<u>64</u>	<u>64</u>
Total	65	65	65	65
Debt Service	\$ 205,560	\$ 314,249	\$ 314,249	\$ 312,737

SHELDON FIRE DISTRICT
FY 2015 BUDGET

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
Revenues				
Ad Valorem Taxes	<u>\$ 1,100,629</u>	<u>\$ 1,139,266</u>	<u>\$ 1,095,000</u>	<u>\$ 1,167,548</u>
Total Revenues	<u>1,100,629</u>	<u>1,139,266</u>	<u>1,095,000</u>	<u>1,167,548</u>
Expenditures				
Salaries	732,903	795,447	781,658	806,171
Benefits	190,399	214,849	205,465	223,077
Purchased Services	89,762	85,900	84,500	89,900
Supplies	<u>67,445</u>	<u>43,070</u>	<u>43,620</u>	<u>48,400</u>
Total Expenditures	<u>1,080,509</u>	<u>1,139,266</u>	<u>1,115,243</u>	<u>1,167,548</u>
Increase (Decrease) in Fund Balance	20,120	-	(20,243)	-
Fund Balance, Beginning	<u>\$ 414,228</u>	<u>\$ 434,348</u>	<u>\$ 434,348</u>	<u>\$ 414,105</u>
Fund Balance, Ending	<u>\$ 434,348</u>	<u>\$ 434,348</u>	<u>\$ 414,105</u>	<u>\$ 414,105</u>
FTEs:				
Administrative	2	2	2	2
Firemen				
Total	14	14	14	14
Debt Service	\$ 72,405	\$ 72,500	\$ 72,500	\$ 72,500

DAUFUSKIE ISLAND FIRE DISTRICT
FY 2015 BUDGET

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
Revenues				
Ad Valorem Taxes	\$ 940,804	\$ 1,026,333	\$ 980,000	\$ 1,068,509
Miscellaneous	26,476	-	-	-
Total Revenues	<u>967,280</u>	<u>1,026,333</u>	<u>980,000</u>	<u>1,068,509</u>
Expenditures				
Salaries	709,098	773,163	773,163	791,242
Benefits	140,469	145,903	145,903	170,000
Purchased Services	57,905	70,378	70,378	70,378
Supplies	23,046	36,889	36,889	36,889
Capital	11,706	-	-	-
Total Expenditures	<u>942,224</u>	<u>1,026,333</u>	<u>1,026,333</u>	<u>1,068,509</u>
Increase (Decrease) in Fund Balance	25,056	-	(46,333)	-
Fund Balance, Beginning	<u>\$ 97,410</u>	<u>\$ 122,466</u>	<u>\$ 122,466</u>	<u>\$ 76,133</u>
Fund Balance, Ending	<u>\$ 122,466</u>	<u>\$ 122,466</u>	<u>\$ 76,133</u>	<u>\$ 76,133</u>
FTEs:				
Administrative	1	1	1	1
Firemen	12	12	12	12
Total	<u>13</u>	<u>13</u>	<u>13</u>	<u>13</u>
Debt Service	0	0	0	0

BURTON FIRE DISTRICT
FY 2015 BUDGET

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
Revenues				
Ad Valorem Taxes	\$ 4,163,894	\$ 4,133,765	\$ 3,800,000	\$ 4,029,051
Municipal Contracts	387,369	375,000	375,000	375,000
Misc. Impact Fees & Debt Service FB	100,000	-	-	180,000
Other Financing Sources	250,000	-	-	300,000
Total Revenues	<u>4,901,263</u>	<u>4,508,765</u>	<u>4,175,000</u>	<u>4,884,051</u>
Expenditures				
Salaries	2,634,237	2,781,959	2,747,200	2,815,161
Benefits	1,292,593	1,373,563	1,364,327	1,443,740
Purchased Services	213,926	265,150	227,609	272,650
Supplies	280,826	247,500	248,422	247,500
Capital	581,100	135,000	135,000	778,400
Total Expenditures	<u>5,002,682</u>	<u>4,803,172</u>	<u>4,722,558</u>	<u>5,557,451</u>
Increase (Decrease) in Fund Balance	(101,419)	(294,407)	(547,558)	(673,400)
Fund Balance, Beginning	<u>\$ 2,031,861</u>	<u>\$ 1,930,442</u>	<u>\$ 1,930,442</u>	<u>\$ 1,382,884</u>
Fund Balance, Ending	<u>\$ 1,930,442</u>	<u>\$ 1,636,035</u>	<u>\$ 1,382,884</u>	<u>\$ 709,484</u>
FTEs:				
Administrative	2	2	2	2
Firemen	54	54	54	54
Total	<u>56</u>	<u>56</u>	<u>56</u>	<u>56</u>
Debt Service	\$ 368,523	\$ 373,587	\$ 373,587	\$ 385,268

BLUFFTON FIRE DISTRICT
FY 2015 BUDGET

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
Revenues				
Ad Valorem Taxes	\$ 9,850,789	\$ 10,723,403	\$ 10,422,630	\$ 10,600,000
Charges for Services	15,560	25,000	25,000	25,000
Fine & Forfeitures	47,531	45,000	45,000	45,000
Interest	4,672	4,700	4,700	4,500
Other Financing Sources	647,883	-	-	-
Total Revenues	<u>10,566,435</u>	<u>10,798,103</u>	<u>10,497,330</u>	<u>10,674,500</u>
Expenditures				
Salaries	7,321,743	8,237,157	8,123,386	8,334,088
Benefits	1,175,082	1,468,475	1,400,000	1,475,000
Purchased Services	808,927	1,007,771	800,000	809,855
Supplies	190,986	214,573	146,000	140,000
Capital	2,057,150	1,000,000	1,000,000	195,300
Unclassified	995	995	995	1,000
Total Expenditures	<u>\$ 11,554,883</u>	<u>\$ 11,928,971</u>	<u>\$ 11,470,381</u>	<u>\$ 10,955,243</u>
Increase (Decrease) in Fund Balance	(988,448)	(1,130,868)	(973,051)	(280,743)
Fund Balance, Beginning	<u>\$ 4,351,457</u>	<u>\$ 3,363,009</u>	<u>\$ 3,363,009</u>	<u>\$ 2,389,958</u>
Fund Balance, Ending	<u>\$ 3,363,009</u>	<u>\$ 2,232,141</u>	<u>\$ 2,389,958</u>	<u>\$ 2,109,215</u>
FTEs:				
Administrative	17	17	17	17
Firemen	87	111	111	111
Total	<u>104</u>	<u>128</u>	<u>128</u>	<u>128</u>
Debt Service	\$ -	\$ -	\$ -	\$ -

FY 2015 FIRE DISTRICT MILLAGE SUMMARY

	<u>Lady's Island/ St. Helena</u>	<u>Sheldon</u>	<u>Daufuskie</u>	<u>Burton</u>	<u>Bluffton</u>
Mil Value as of 2/28/2014¹	\$ 132,538	\$ 32,591	\$ 19,526	\$ 66,949	\$ 441,548
FY 2014 Operation Millage	34.82	34.53	54.57	60.18	24.02
FY 2015 Required Operation Millage	<u>35.94</u>	<u>35.82</u>	<u>54.72</u>	<u>60.18</u>	<u>24.02</u>
Increase in Operation Millage	1.12	1.29	0.15	-	-
FY 2014 Debt Millage	2.30	2.20	-	5.74	-
FY 2015 Required Debt Millage	<u>2.36</u>	<u>2.22</u>	<u>-</u>	<u>5.75</u>	<u>-</u>
Increase in Debt Millage	0.06	0.02	-	0.01	-
Total Millage increase	1.18	1.31	0.15	0.01	-
Average value of real property ²	\$ 149,807	\$ 170,955	\$ 141,093	\$ 100,888	\$ 262,801
<u>Increase in property taxes based on average real property value</u>					
Legal Resident (4%)	\$ 7.07	\$ 8.96	\$ 0.85	\$ 0.04	\$ -
Non Legal Resident (6%)	\$ 10.61	\$ 13.44	\$ 1.27	\$ 0.06	\$ -

1 - The mil value is calculated using all property (real, personal, and auto) and net of TIFs, if applicable.

2 - The average value of real property does not include any personal or auto property values.

Solicitors Elected Officials Budget County Template 042214.xlsx

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
General Fund Revenues				
State Drug Court Money	\$ 103,006	\$ 100,000	\$ 112,074	\$ 100,000
Internal Program Revenue	\$ 47,983	\$ 45,000	\$ 36,517	\$ 45,000
State Grant Money (JMDC/Trans	\$ 139,766	\$ -	\$ -	\$ -
Hilton Head/Bluffton Financing	\$ 98,500	\$ 98,500	\$ 98,500	\$ 98,500
Beaufort County Appropriation	\$ 962,817	\$ 1,060,000	\$ 1,060,000	\$ 1,480,748
General Fund Revenues	\$ 1,352,072	\$ 1,303,500	\$ 1,307,091	\$ 1,724,248
Expenditures				
Personnel	\$ 1,026,977	\$ 1,131,985	\$ 1,048,945	\$ 1,431,991
Purchased Services				
Beaufort County Office				
CAM Fees	\$ 32,069	\$ 35,000	\$ 32,712	\$ 32,712
Electricity	\$ 10,909	\$ 11,579	\$ 11,768	\$ 11,768
Fire Protection	\$ 104	\$ 100	\$ 206	\$ 206
Insurance	\$ -	\$ 372	\$ 372	\$ 372
Janitorial	\$ 5,160	\$ 6,200	\$ 5,160	\$ 5,160
Pest Control	\$ 480	\$ 494	\$ 485	\$ 485
R&M Building	\$ 126	\$ 240	\$ 320	\$ 320
Rent	\$ 119,664	\$ 123,492	\$ 123,845	\$ 123,946
Security	\$ 851	\$ 779	\$ 659	\$ 659
Telephone	\$ 17,719	\$ 15,141	\$ 17,530	\$ 17,530
	\$ 187,081	\$ 193,397	\$ 193,056	\$ 193,157
Court Expenses	\$ 24,036	\$ 24,000	\$ 25,981	\$ 24,000
Drug Court Expenses	\$ 42,688	\$ 22,812	\$ 24,275	\$ 17,500
	\$ 66,724	\$ 46,812	\$ 50,256	\$ 41,500

Solicitors Elected Officials Budget County Template 042214.xlsx

Capital	\$	-	\$	-	\$	-	\$	57,600
Subsidies	\$	-	\$	-	\$	-	\$	-
Contingency	\$	-	\$	-	\$	-	\$	-
Unclassified	\$	-	\$	-	\$	-	\$	-
Transfers Out ¹	\$	71,290	\$	(68,694)	\$	14,835	\$	-
Total Expenditures	\$	<u>1,352,072</u>	\$	<u>1,303,500</u>	\$	<u>1,307,091</u>	\$	<u>1,724,248</u>

FTEs: 17.5 17.5 16.5 20.5

1 - Please provide detail as to what special revenue funds the transfers are being made to.
 Transfer to Capital Account for future Capital Needs

A photograph of the Beaufort County Courthouse, a large brick building with a prominent portico supported by white columns. The words "BEAUFORT COUNTY COURTHOUSE" are engraved in large, dark letters across the top of the brick facade.

BEAUFORT COUNTY COURTHOUSE

**STATE OF SOUTH CAROLINA
OFFICE OF THE SOLICITOR
FOURTEENTH JUDICIAL CIRCUIT**

BEAUFORT COUNTY BUDGET REQUEST

FISCAL YEAR 2015





Complying with the recent S.C Supreme Court Order

The Supreme Court of South Carolina has issued an order that calls for the elimination of the backlog by immediately scheduling all cases that are older than 18 months. In Beaufort County, that equates to 367 cases as of March 7.

In order to comply with the directive, we need to prosecute all cases that are over 18 months but also cases that are close to hitting that deadline. We have another 215 cases older than a year. However, by focusing entirely on old cases, there will be a whole new crop of old cases that take their place. We would always be treading water, focusing on the oldest cases, which would monopolize the court's time to the detriment of public safety.

A long-term solution to the issue of backlogs is to implement a system that tackles existing old cases while also cutting down on the time it takes for new cases to make it to court. The way to do that is to work the docket from both ends, with enough resources to eliminate the backlog while also prosecuting 75 percent of incoming cases within six months and 90 percent of cases within a year. We cannot accomplish this with our present staffing levels.

Our five-year average of incoming cases is 2,464 cases a year. A lawyer in our office can prosecute a maximum of 150 cases in six months, which is more than twice the national average. In order to prosecute 75 percent (1,848) within six months, we need 12.3 prosecutors.

We currently have 7.5 prosecutors assigned to General Sessions Court in Beaufort County. If we prosecute the maximum number of cases possible, we will prosecute 2,250 cases a year. That is less than our average case intake, meaning our backlog will grow by 200 cases a year. If this deficiency is not attended to, we risk a situation in which only the oldest cases make their way into court.

With the 12.5 lawyers I am requesting in this budget, we can eliminate the existing backlog within 18 months. After the backlog is eliminated, we can begin to reduce the time it takes for a case to go to court. If we are able to prosecute 75 percent of incoming cases within six months of arrest and 90 percent within one year, we would see a 50 percent improvement in our average time-to-court.

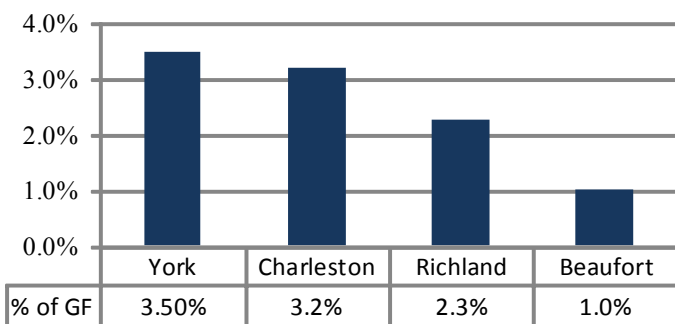
The court system should not only ensure a defendant's right to a speedy trial, it should also provide that same right to victims who seek justice, compassion and closure. By bringing 90 percent of criminal cases to a resolution within one year, we will further reduce jail costs, improve public safety by prosecuting cases before defendants post bond and provide more immediate justice for victims.

BEAUFORT FY2015 BUDGET

Position	Salary
Administrating Solicitor	\$ 70,000
Senior Prosecutor	\$ 65,000
Senior Prosecutor	\$ 65,000
Senior Prosecutor	\$ 65,000
Senior Prosecutor	\$ 65,000
Assistant Solicitor	\$ 50,000
Assistant Solicitor	\$ 50,000
Assistant Solicitor	\$ 50,000
Assistant Solicitor	\$ 50,000
General Prosecution Subtotal	\$ 530,000
Career Criminal Prosecutor	\$ 65,000
Career Criminal Prosecutor	\$ 65,000
Career Criminal Prosecutor	\$ 65,000
Career Criminal Prosecutor (PT)	\$ 16,250
Career Criminal Investigator	\$ 50,000
Career Criminal Investigator	\$ 50,000
Career Criminal Team Subtotal	\$ 311,250
Victim Advocate (Northern)	\$ 32,000
Victim Advocate (Southern)	\$ 32,000
Victim Services Subtotal	\$ 64,000
Juvenile Prosecutor	\$ 54,080
Juvenile Prosecution Subtotal	\$ 54,080
Drug Court Director	\$ 50,000
Drug Court Enforcement Officer	\$ 40,000
Drug Court Counselor	\$ 50,000
Drug Court Personnel Subtotal	\$ 140,000
Total Salaries	\$ 1,099,330
Fringe Benefits	\$ 332,661
Total Personnel	\$ 1,431,991

New in FY15

What other counties spend on prosecution

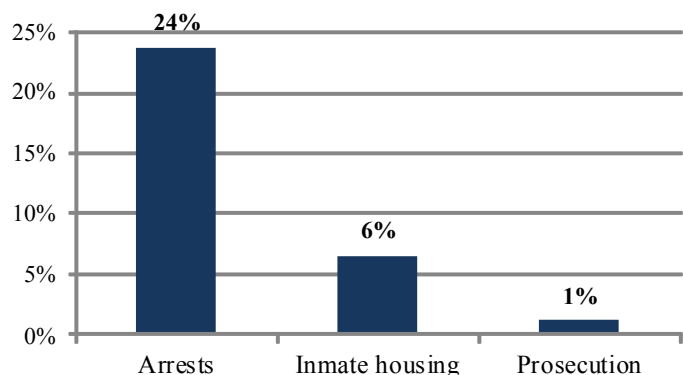


Expenses	
Rent	\$ 123,946
CAM Fees	\$ 32,712
Telephones	\$ 17,530
Electricity	\$ 11,768
Janitorial	\$ 5,160
Security	\$ 659
Pest Control	\$ 485
Insurance	\$ 372
R&M Building	\$ 320
Fire Protection	\$ 206
Office Expenses	\$ 193,158
General Sessions Court Expenses	\$ 24,000
Drug Court Expenses	\$ 17,500
Electronic Discovery/Case Management	\$ 57,600
Total Court Expenses	\$ 99,100
Total Beaufort County Costs	\$ 1,724,249
Revenues	
State Drug Court Money	\$ 100,000.00
Internal Program Revenue	\$ 45,000.00
Hilton Head/Bluffton Funding	\$ 98,500.00
Beaufort County FY14 Allocation	\$ 1,060,000.00
Existing Revenue Subtotal	\$ 1,303,500.00
Additional Cost of Budget	\$ 420,749.00
Beaufort County FY15 Request	\$ 1,480,749.00

About this budget

All of these personnel work **EXCLUSIVELY** in Beaufort County. Employees who work in multiple counties are funded by the state.

How we fit into Beaufort County's current spending



BEAUFORT 3-YEAR FINANCIAL STATEMENT

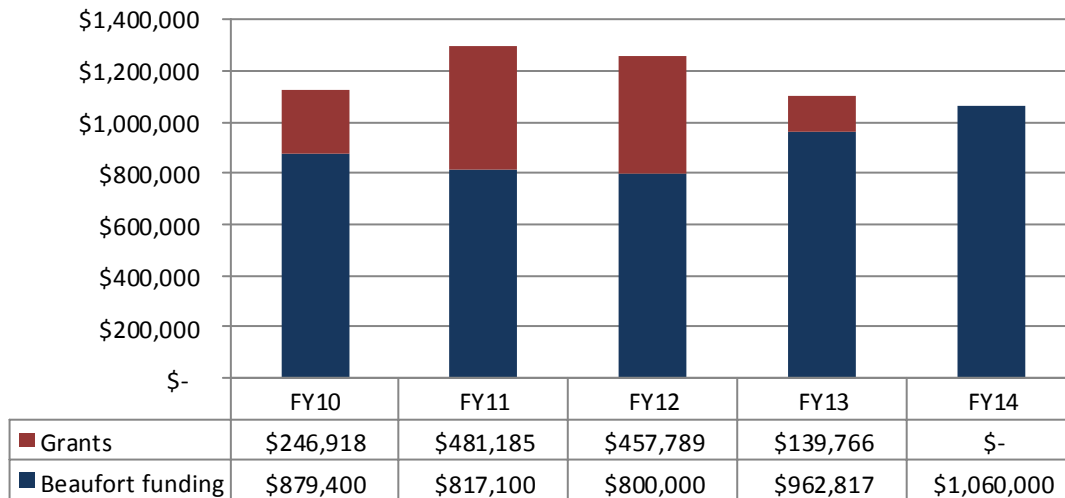
	<u>Jul 12 - Jun 13</u>	<u>Projected Jul 13 - June 14</u>	<u>Requested Jul 14 - Jun 15</u>
Ordinary Income/Expense			
County Appropriations			
Beaufort	\$ 962,817.00	\$ 1,060,000.00	\$1,480,748.00
Municipal Support			
Bluffton	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00
Hilton Head	\$ 83,500.00	\$ 83,500.00	\$ 83,500.00
Total Municipal Support	\$ 98,500.00	\$ 98,500.00	\$ 98,500.00
State Funding			
Drug Court Funding	\$ 103,006.40	\$ 112,073.55	\$ 100,000.00
JMDC Grant	\$ 127,097.00	\$ -	
Transfer Court Grant	\$ 12,669.00	\$ -	
Total State Funding	\$ 242,772.40	\$ 112,073.55	\$ 100,000.00
Internal Programs Income			
MDC Beaufort	\$ 26,673.00	\$ 20,182.34	\$ 25,000.00
Conditional Discharge GS/Mag/Mun	\$ 21,310.32	\$ 16,334.81	\$ 20,000.00
Total Internal Programs Income	\$ 47,983.32	\$ 36,517.15	\$ 45,000.00
Total Income	\$1,352,072.72	\$ 1,307,090.70	\$1,724,248.00
Expense			
Beaufort Facility & Technology			
CAM Fees	\$ 32,068.56	\$ 32,712.28	\$ 32,712.28
Electricity	\$ 10,909.10	\$ 11,767.84	\$ 11,767.84
Fire Protection	\$ 103.46	\$ 206.00	\$ 206.00
Insurance	\$ -	\$ 372.00	\$ 372.00
Janitorial	\$ 5,160.00	\$ 5,160.00	\$ 5,160.00
Pest Control	\$ 480.00	\$ 484.66	\$ 484.66
R&M Building	\$ 125.87	\$ 319.71	\$ 319.71
Rent	\$ 119,663.93	\$ 123,844.90	\$ 123,946.04
Security	\$ 850.54	\$ 658.86	\$ 658.86
Telephone	\$ 17,719.12	\$ 17,529.61	\$ 17,529.61
Total Beaufort Facility & Technology	\$ 187,080.58	\$ 193,055.86	\$ 193,157.00
Other Expenses			
JMDC Expense	\$ 27,504.05	\$ 7,677.62	\$ 7,000.00
MDC Expense	\$ 15,183.95	\$ 16,597.26	\$ 10,500.00
Court Expenses	\$ 24,036.36	\$ 25,981.32	\$ 24,000.00
Electronic Discovery	\$ -	\$ -	\$ 57,600.00
Total Other Expenses	\$ 66,724.36	\$ 50,256.20	\$ 99,100.00
Payroll Expenses			
Beaufort Personnel	\$1,026,977.25	\$ 1,048,944.59	\$1,431,991.00
Total Beaufort Payroll	\$1,026,977.25	\$ 1,048,944.59	\$1,431,991.00
Total Expense	\$1,280,782.19	\$ 1,292,256.65	\$1,724,248.00
Net Profit/Loss	\$ 71,290.53	\$ 14,834.14	\$ -
Attorney FTEs	10.00	8.50	13.50
Support Staff	7.50	8.00	7.00
Total Beaufort FTEs	17.50	16.50	20.50



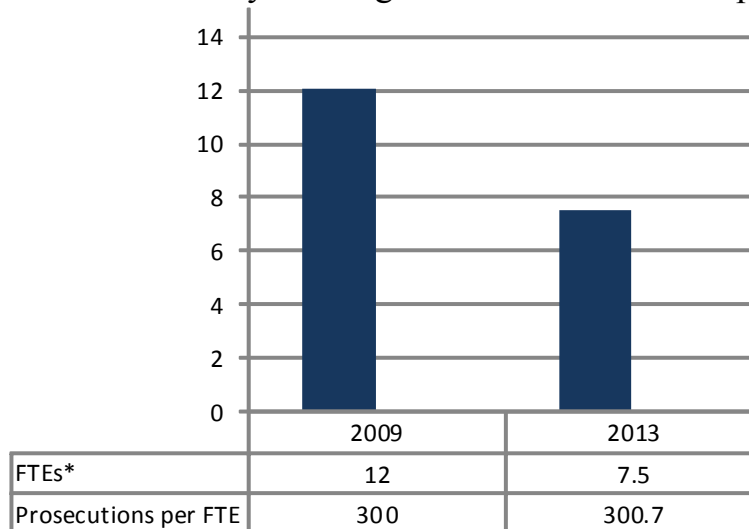
Historical Funding

Fewer prosecutors than five years ago

In 2009, we secured several three-year grants in order to add personnel to Beaufort County to begin the process of reducing the backlog and improving the level of service we provide to the residents of the county. Our intent was to use these grants to begin the process of building a professional prosecutor's office. This resulted in the 47 percent reduction in case backlogs and improved case outcomes. When the grants expired in FY12-13 and with insufficient local revenue to take their place, we reduced our staffing levels through attrition. This budget proposal will restore those cuts and provide sufficient resources for at least three years.



Historical Attorney Staffing Levels and Worker Capacity



*Does not include juvenile prosecutor

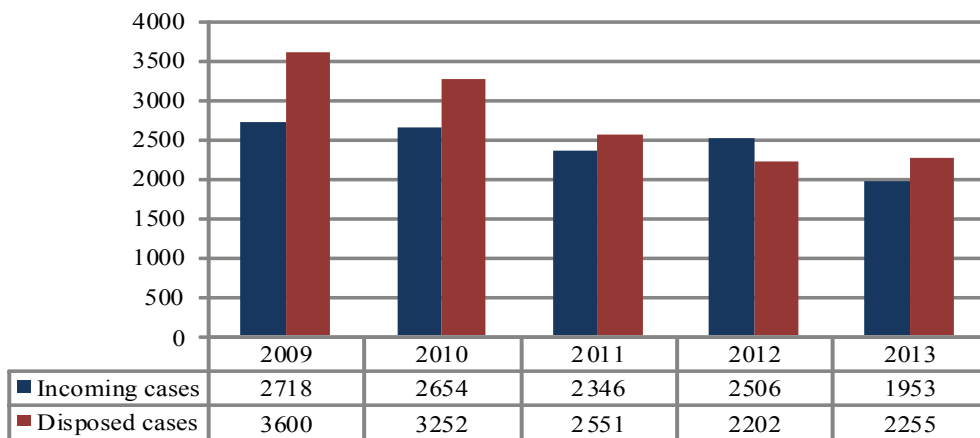


2015 Budget Objective

FASTER TIME TO COURT

This budget proposal will enable us to professionally eliminate the Beaufort County backlog in order to comply with a recent South Carolina Supreme Court mandate to immediately dispose of all cases older than 18 months and to improve the speed at which new cases get to court, which currently averages 369 days. We will have enough resources to expeditiously prosecute all incoming cases while continuing to reduce the number of older cases on the docket. Within 18 months of having the new personnel in place, our projections indicate we will have eliminated the backlog. Our goal is to have a time-to-court average of six months, with 75 percent of cases resolved within six months and 90 percent prosecuted within one year. This further reduces jail costs, improves case outcomes, fulfills our societal obligation to crime victims and avoids a situation in which only the oldest cases make it to court.

Beaufort Caseload



- ◆ To comply with the Supreme Court order, we must prosecute incoming cases more quickly, while also attacking the backlog.
- ◆ We conducted a best practices analysis of other Solicitor's Offices in the state. The best system is in Rock Hill, which has no backlog and is fastest in the state. They prosecute 78 percent of their cases within six months of arrest.
- ◆ Our five-year average of incoming cases is 2,464
- ◆ Each lawyer in our office currently averages 302 cases per year.
- ◆ In order to prosecute 75 percent of cases within six months, we need 12.5 attorney FTEs.
- ◆ **OUTCOME: This will enable us to both comply with the order and never be in this position again.**

Total Incoming Cases	2464
# to prosecute w/in 6 months	1848
6-month capacity per attorney	150
# of prosecutors needed	12.3

14th Judicial Circuit Solicitor's Office
Balance Sheet

Mar 31, 14

ASSETS

Current Assets

Checking/Savings

AEP PROGRAM	11,879.52
CAPITAL ACCOUNT	480,956.48
COLLETON COUNTY PAYROLL ACCOUNT	-6,792.00
DRUG COURT-MDC	12,851.85
EXPUNGEMENT	50,899.31
FORFEITURE	142,455.93
OPERATING	143,134.19
PTI SOLICITOR	306,116.62
PTI TRUST	41.15
TEP	7,523.92
W/C-ALLEDALE	372.22
W/C-BEAUFORT	-382.27
W/C-COLLETON	347.46
W/C-HAMPTON	-92.90
W/C-JASPER	358.94

Total Checking/Savings 1,149,670.42

Accounts Receivable

Accounts Receivable

Allendale County	2,050.00
Beaufort County	6,900.00
Colleton County	74,142.75
Hampton County	5,300.00
Jasper County	2,400.00
State Funding Recievable	104,553.32
State Grants Recievable	0.00

Total Accounts Receivable 195,346.07

Total Accounts Receivable 195,346.07

Other Current Assets

Prepaid Expenses 28,520.02

Total Other Current Assets 28,520.02

Total Current Assets 1,373,536.51

14th Judicial Circuit Solicitor's Office
Balance Sheet

Mar 31, 14

Fixed Assets

Acc'd Depreciation-Auto	-100,034.21
Acc'd Depreciation-Equipment	-181,167.82
Acc'd Depreciation-Furniture	-43,584.00
Acc'd Depreciation-Leasehold Im	-77,267.24
Acc'd Depreciation-Software	-26,419.00
Automobiles	261,233.53
Equipment	266,410.66
Furniture	74,981.62
Leasehold Improvements	120,026.00
Software	30,661.50
Total Fixed Assets	324,841.04

Other Assets

Prepaid Deposits	200.00
Total Other Assets	200.00

TOTAL ASSETS 1,698,577.55

LIABILITIES & EQUITY

Liabilities

Current Liabilities

Accounts Payable

Accounts Payable	15,867.97
Total Accounts Payable	15,867.97

Other Current Liabilities

AEP Education Services Payable	-125.00
Expungement Clerk Fees Payable	875.00
Expungement SLED Fees Payable	275.00
PTI Restitution Payable	16.00
Use Tax Payable	141.83
WC County Fees Payable	
WC County Fees Payable Allendal	41.00
WC County Fees Payable Beaufort	0.00
WC County Fees Payable Colleton	0.00
WC County Fees Payable Hampton	0.00
WC County Fees Payable Jasper	-11.50
WC County Fees Payable - Other	0.00
Total WC County Fees Payable	29.50

14th Judicial Circuit Solicitor's Office
Balance Sheet

Mar 31, 14

WC Restitution Payable	
WC Restitution Payable Allendal	0.00
WC Restitution Payable Beaufort	-163.65
WC Restitution Payable Colleton	98.00
WC Restitution Payable Hampton	55.00
WC Restitution Payable Jasper	685.48
WC Restitution Payable - Other	0.00
Total WC Restitution Payable	<u>674.83</u>
Total Other Current Liabilities	<u>1,887.16</u>
Total Current Liabilities	17,755.13
Long Term Liabilities	0.00
Total Liabilities	<u>17,755.13</u>
Equity	
Opening Bal Equity	1,158,356.18
Retained Earnings	741,908.40
Net Income	-219,442.16
Total Equity	<u>1,680,822.42</u>
TOTAL LIABILITIES & EQUITY	<u><u>1,698,577.55</u></u>

14th Judicial Circuit Solicitor's Office
Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
Ordinary Income/Expense							
Income							
Governmental Support							
County Appropriations							
Allendale	0.00	4,215.00	0.00	4,215.00	4,215.00	4,215.00	4,215.00
Beaufort	220,317.00	66,666.74	66,666.67	962,817.00	800,000.00	800,000.00	800,000.00
Colleton	70,242.75	70,199.00	70,242.75	280,971.00	280,796.00	280,971.00	280,796.00
Hampton	0.00	43,770.00	0.00	87,540.00	87,540.00	87,540.00	87,540.00
Jasper	0.00	55,000.00	55,000.00	114,950.00	112,475.00	114,950.00	112,475.00
Total County Appropriations	290,559.75	239,850.74	191,909.42	1,450,493.00	1,285,026.00	1,287,676.00	1,285,026.00
Municipal Support							
Bluffton	0.00	0.00	0.00	15,000.00	15,000.00	15,000.00	15,000.00
Hardeeville Career Criminal	0.00	0.00	0.00	17,500.00	17,500.00	17,500.00	17,500.00
HH Drug Court	0.00	0.00	0.00	0.00	43,500.00	83,500.00	43,500.00
Hilton Head	0.00	0.00	0.00	83,500.00	40,000.00	0.00	40,000.00
Ridgeland Career Criminal	0.00	17,500.00	17,500.00	17,500.00	17,500.00	17,500.00	17,500.00
Total Municipal Support	0.00	17,500.00	17,500.00	133,500.00	133,500.00	133,500.00	133,500.00
State Funding							
CDV Funding	0.00	25,000.00	0.00	100,000.00	100,000.00	0.00	100,000.00
Conditional Discharge-GS	2,276.11	1,314.36	3,598.55	9,804.74	5,257.43	16,928.20	5,257.43
Conditional Discharge-Magistrat	828.13	828.13	0.00	6,090.24	3,312.50	0.00	3,312.50
Conditional Discharge-Municipal	1,230.00	1,230.00	0.00	4,816.50	4,920.00	0.00	4,920.00
Court Fee Funding	0.00	7,323.50	3,358.66	9,099.66	14,647.00	13,435.40	14,647.00
DOR Non-Recurring (90.16)	0.00	0.00	0.00	0.00	0.00	4,894.18	0.00
Drug Court Funding	22,046.00	22,046.00	32,595.49	131,481.66	88,184.00	80,000.00	88,184.00
Judicial Support (46.3)	0.00	0.00	0.00	268,543.00	261,172.92	169,099.00	261,172.92
Juvenile Arbitration	15,000.00	15,000.00	15,000.00	60,000.00	60,000.00	60,000.00	60,000.00
Law Enforcement Funding	49,316.00	49,316.00	44,950.00	181,278.96	197,264.00	179,801.75	197,264.00
SOVA 2	10,156.25	10,158.50	10,156.25	40,625.00	40,634.00	40,625.00	40,634.00
TEP Funding	341.83	341.83	2,175.76	1,072.62	1,367.29	2,175.76	1,367.29
Vic/Wit Program (46.10-46.11)	0.00	2,203.50	0.00	10,497.44	8,814.00	8,293.93	8,814.00
Total State Funding	101,194.32	134,761.82	111,834.71	823,309.82	785,573.14	575,253.22	785,573.14

14th Judicial Circuit Solicitor's Office Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
State Grants							
DUI	17,559.00	18,750.00	6,982.00	73,638.00	75,000.00	39,595.00	75,000.00
JAG-Career Criminal	0.00	0.00	31,078.00	20.00	0.00	158,612.00	0.00
JAG-CDV	0.00	0.00	22,750.00	0.00	0.00	90,000.00	0.00
JAG-Juvenile MDC	10,667.00	0.00	40,502.00	124,149.00	96,565.50	154,144.00	96,565.50
Transfer Court	0.00	0.00	39,801.00	12,669.00	14,753.00	174,050.00	14,753.00
VAWA	24,430.00	26,093.75	25,533.00	109,587.00	104,375.00	111,170.00	104,375.00
Total State Grants	52,656.00	44,843.75	166,646.00	320,063.00	290,693.50	727,571.00	290,693.50
Total Governmental Support	444,410.07	436,956.31	487,890.13	2,727,365.82	2,494,792.64	2,724,000.22	2,494,792.64
Internal Programs Income							
AEP Income							
AEP Allendale	0.00	0.00	0.00	500.00	0.00	0.00	0.00
AEP Beaufort	1,250.00	2,083.34	2,100.00	20,175.00	25,000.08	26,200.00	25,000.08
AEP Colleton	0.00	0.00	500.00	700.00	0.00	1,550.00	0.00
AEP Hampton	0.00	0.00	0.00	750.00	0.00	150.00	0.00
AEP Jasper	250.00	0.00	0.00	250.00	0.00	0.00	0.00
Total AEP Income	1,500.00	2,083.34	2,600.00	22,375.00	25,000.08	27,900.00	25,000.08
Bond Estreatment Income							
Bond Estreatment Allendale	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bond Estreatment Beaufort	655.31	666.67	972.17	8,800.35	8,000.00	17,544.90	8,000.00
Bond Estreatment Colleton	0.00	333.33	0.00	0.00	4,000.00	3,666.86	4,000.00
Bond Estreatment Hampton	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bond Estreatment Jasper	0.00	333.33	0.00	0.00	4,000.00	8,250.00	4,000.00
Total Bond Estreatment Income	655.31	1,333.33	972.17	8,800.35	16,000.00	29,461.76	16,000.00

14th Judicial Circuit Solicitor's Office
Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
Expungement Income							
Expungement Allendale	0.00	0.00	0.00	1,000.00	1,250.00	500.00	1,250.00
Expungement Beaufort	4,380.00	3,000.00	3,000.00	51,375.00	42,525.00	40,185.00	42,525.00
Expungement Colleton	250.00	250.00	400.00	8,350.00	7,975.00	7,400.00	7,975.00
Expungement Hampton	750.00	250.00	1,000.00	4,785.00	3,750.00	5,785.00	3,750.00
Expungement Jasper	0.00	250.00	500.00	6,070.00	4,500.00	6,500.00	4,500.00
Total Expungement Income	5,380.00	3,750.00	4,900.00	71,580.00	60,000.00	60,370.00	60,000.00
Forfeiture Income							
Forfeiture Beaufort	0.00	0.00	0.00	2,734.18	21,000.00	719.40	21,000.00
Forfeiture Colleton	0.00	4,885.00	0.00	10,044.88	19,540.00	3,448.87	19,540.00
Forfeiture Hampton	0.00	2,000.00	0.00	0.00	21,000.00	0.00	21,000.00
Forfeiture HCSO	0.00	0.00	0.00	2,482.00	0.00	36,413.00	0.00
Forfeiture Jasper	0.00	0.00	0.00	2,483.37	16,357.00	0.00	16,357.00
Forfeiture Ridgeland	0.00	1,000.00	44,123.20	0.00	7,500.00	44,123.20	7,500.00
Forfeiture Walterboro PD	0.00	0.00	300.00	0.00	0.00	300.00	0.00
Forfeiture Yemassee	20,971.00	0.00	0.00	30,971.00	16,000.00	0.00	16,000.00
Total Forfeiture Income	20,971.00	7,885.00	44,423.20	48,715.43	101,397.00	85,004.47	101,397.00
JPTI Income							
JPTI Allendale	0.00	0.00	0.00	0.00	0.00	0.00	0.00
JPTI Beaufort	209.00	1,125.04	200.00	6,284.55	9,510.04	8,609.45	9,510.04
JPTI Colleton	400.00	0.00	0.00	2,100.00	500.00	500.00	500.00
JPTI Hampton	0.00	0.00	0.00	300.00	990.00	900.00	990.00
JPTI Jasper	100.00	0.00	140.00	360.00	0.00	540.00	0.00
Total JPTI Income	709.00	1,125.04	340.00	9,044.55	11,000.04	10,549.45	11,000.04
MDC Income							
MDC Beaufort	2,060.00	1,500.00	1,300.00	26,673.00	21,600.00	20,416.00	21,600.00
Total MDC Income	2,060.00	1,500.00	1,300.00	26,673.00	21,600.00	20,416.00	21,600.00

14th Judicial Circuit Solicitor's Office
Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
PTI Income							
PTI Allendale	300.00	350.00	0.00	1,450.00	4,200.00	1,350.00	4,200.00
PTI Beaufort	11,715.00	11,150.10	10,475.00	131,306.00	137,850.10	134,882.71	137,850.10
PTI Colleton	245.00	1,750.00	2,600.00	12,050.00	26,250.00	23,025.00	26,250.00
PTI Hampton	655.00	1,050.00	600.00	7,720.00	9,450.00	14,270.00	9,450.00
PTI Jasper	660.00	1,050.00	800.00	23,260.00	12,250.00	13,040.00	12,250.00
Total PTI Income	13,575.00	15,350.10	14,475.00	175,786.00	190,000.10	186,567.71	190,000.10
TEP Income							
TEP Allendale	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TEP Beaufort	840.00	600.00	980.00	10,500.00	7,320.00	7,560.00	7,320.00
TEP Colleton	0.00	0.00	0.00	280.00	840.00	420.00	840.00
TEP Hampton	0.00	0.00	0.00	140.00	0.00	0.00	0.00
TEP Jasper	0.00	140.00	0.00	280.00	840.00	560.00	840.00
Total TEP Income	840.00	740.00	980.00	11,200.00	9,000.00	8,540.00	9,000.00
Worthless Check Income							
WC Allendale	451.00	1,116.66	900.00	8,101.00	13,400.00	13,468.00	13,400.00
WC Beaufort	1,600.00	2,608.33	2,150.00	29,141.00	31,300.00	31,558.23	31,300.00
WC Colleton	1,450.00	2,550.00	2,200.00	25,575.00	30,600.00	30,876.50	30,600.00
WC Hampton	700.00	2,500.00	1,650.00	25,254.00	30,000.00	28,989.31	30,000.00
WC Jasper	1,300.00	1,237.50	650.00	11,166.66	14,850.00	12,426.90	14,850.00
Total Worthless Check Income	5,501.00	10,012.49	7,550.00	99,237.66	120,150.00	117,318.94	120,150.00
Total Internal Programs Income	51,191.31	43,779.30	77,540.37	473,411.99	554,147.22	546,128.33	554,147.22
Miscellaneous Income							
Cash Over/Under	3.37	0.00	15.00	1,266.02	0.00	231.62	0.00
Credit Card Handling Fees	-155.48		0.00	-218.67		0.00	
Interest Income	165.36	125.00	164.00	2,137.36	1,500.00	1,916.36	1,500.00
Other Income	200.00	0.00	2.97	3,697.86	0.00	6,506.08	0.00
Total Miscellaneous Income	213.25	125.00	181.97	6,882.57	1,500.00	8,654.06	1,500.00

14th Judicial Circuit Solicitor's Office
Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
Total Income	495,814.63	480,860.61	565,612.47	3,207,660.38	3,050,439.86	3,278,782.61	3,050,439.86
Gross Profit	495,814.63	480,860.61	565,612.47	3,207,660.38	3,050,439.86	3,278,782.61	3,050,439.86
Expense							
County Expenses							
Allendale							
Postage Allendale	27.80	15.00	0.00	370.00	180.00	287.58	180.00
Supplies Allendale	0.00	15.00	0.00	217.95	390.00	450.77	390.00
Telephone Allendale	206.05	110.00	107.19	1,436.26	1,320.00	1,230.82	1,320.00
Total Allendale	233.85	140.00	107.19	2,024.21	1,890.00	1,969.17	1,890.00
Beaufort							
Cable TV Beaufort	83.57	85.00	167.14	1,002.10	1,020.00	630.71	1,020.00
Computer Beaufort	316.66	100.00	0.00	412.05	1,200.00	1,067.07	1,200.00
Copier Beaufort	1,182.42	875.00	846.97	14,367.57	12,700.00	12,520.72	12,700.00
Document Shredding Beaufort	96.00	45.00	0.00	823.50	540.00	717.00	540.00
FF&E Beaufort	0.00	250.00	40.96	2,392.75	3,000.00	1,532.23	3,000.00
Janitorial Beaufort	430.00	430.00	430.00	5,160.00	6,020.00	5,706.25	6,020.00
Postage Beaufort	176.97	210.00	148.71	2,093.53	2,520.00	2,207.91	2,520.00
Supplies Beaufort	482.32	560.00	331.93	9,728.73	8,135.00	7,891.95	8,135.00
Telephone Beaufort	1,501.63	1,225.00	1,221.88	17,719.12	14,700.00	13,813.08	14,700.00
Total Beaufort	4,269.57	3,780.00	3,187.59	53,699.35	49,835.00	46,086.92	49,835.00
Colleton							
Copier Colleton	205.82	205.00	204.66	3,569.73	3,320.00	3,391.67	3,320.00
Document Shredding Colleton	0.00	0.00	48.00	235.50	180.00	96.00	180.00
FF&E Colleton	0.00	20.00	0.00	0.00	240.00	161.07	240.00
Postage Colleton	55.61	65.00	57.95	896.39	780.00	763.77	780.00
Supplies Colleton	45.05	155.00	166.13	1,461.06	1,860.00	1,628.31	1,860.00
Telephone Colleton	36.45	42.00	41.12	625.50	504.00	496.32	504.00
Total Colleton	342.93	487.00	517.86	6,788.18	6,884.00	6,537.14	6,884.00

14th Judicial Circuit Solicitor's Office Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
Hampton							
Copier Hampton	203.77	205.00	200.73	3,216.45	3,320.00	3,274.87	3,320.00
Document Shredding Hampton	0.00	0.00	48.00	174.00	180.00	192.00	180.00
FF&E Hampton	0.00	20.00	0.00	0.00	240.00	166.17	240.00
Postage Hampton	55.61	65.00	76.90	830.32	780.00	797.67	780.00
Supplies Hampton	180.00	155.00	34.86	1,728.17	1,860.00	2,940.51	1,860.00
Telephone Hampton	36.46	42.00	41.12	456.87	504.00	498.31	504.00
Total Hampton	475.84	487.00	401.61	6,405.81	6,884.00	7,869.53	6,884.00
Jasper							
Copier Jasper	204.69	205.00	204.69	3,223.47	3,320.00	3,153.43	3,320.00
Document Shredding Jasper	0.00	45.00	0.00	189.00	180.00	96.00	180.00
FF&E Jasper	0.00	20.00	0.00	213.34	240.00	1,022.70	240.00
Janitorial Jasper	0.00	0.00	0.00	85.56	0.00	0.00	0.00
Postage Jasper	55.61	65.00	28.98	836.35	780.00	738.70	780.00
Supplies Jasper	0.00	155.00	0.00	1,820.28	1,860.00	1,094.39	1,860.00
Telephone Jasper	72.90	90.00	82.24	921.08	1,080.00	1,047.59	1,080.00
Total Jasper	333.20	580.00	315.91	7,289.08	7,460.00	7,152.81	7,460.00
Total County Expenses	5,655.39	5,474.00	4,530.16	76,206.63	72,953.00	69,615.57	72,953.00
Miscellaneous Circuit Expenses							
Bluffton Office							
CAM	2,672.38	2,916.67	2,672.38	32,068.56	33,534.30	33,511.62	33,534.30
Fire Protection	0.00	0.00	0.00	103.46	100.00	68.75	100.00
Gas and Electric	1,069.93	1,028.09	969.07	10,909.10	11,241.80	10,885.28	11,241.80
Insurance Building	0.00	0.00	0.00	0.00	362.05	0.00	362.05
Pest Control	40.00	40.00	40.00	480.00	480.00	480.00	480.00
R&M Building	0.00	20.00	0.00	125.87	240.00	177.30	240.00
Rent	10,114.79	10,123.87	9,772.08	119,663.93	119,375.70	115,267.50	119,375.70
Security	49.90	49.90	49.90	850.54	756.80	728.56	756.80
Total Bluffton Office	13,947.00	14,178.53	13,503.43	164,201.46	166,090.65	161,119.01	166,090.65

14th Judicial Circuit Solicitor's Office Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
Court Expenses	4,909.77	725.00	-678.72	29,144.38	8,700.00	8,690.26	8,700.00
Financial Expenses	25.00	0.00	0.00	173.27	600.00	618.89	600.00
Grant Expense							
Career Criminal Expense	704.85	660.00	487.34	9,737.21	7,920.00	8,077.22	7,920.00
CDV Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00
DUI Expense	210.59	100.00	31.71	2,655.21	1,732.50	1,650.07	1,732.50
JMDC Expense	1,133.74	0.00	6,376.88	27,504.05	31,275.00	33,966.06	31,275.00
Juvenile Arbitration Expense	1,036.42	225.00	1,222.52	1,395.13	2,700.00	2,167.65	2,700.00
Transfer Court Expense	0.00	0.00	0.00	0.00	0.00	2,945.00	0.00
VAWA Expenses	36.45	735.00	113.35	1,138.21	8,820.00	5,448.77	8,820.00
Total Grant Expense	3,122.05	1,720.00	8,231.80	42,429.81	52,447.50	54,254.77	52,447.50
Insurance Other	74.53	0.00	89.38	323.59	0.00	368.14	0.00
Internal Programs Expense							
AEP Expense	101.76	0.00	143.91	895.79	150.00	204.55	150.00
Bond Estreatment Expense	0.00	275.00	0.00	337.60	3,300.00	3,952.34	3,300.00
Expungement Expenses	42.18	95.00	40.05	989.05	1,140.00	1,118.91	1,140.00
Forfeiture Expense	0.00	700.00	0.00	5,397.32	8,400.00	8,556.71	8,400.00
MDC Expense	3,711.74	975.00	755.52	15,183.95	11,700.00	12,118.58	11,700.00
PTI Expense	611.67	290.00	287.70	2,324.76	3,480.00	3,420.54	3,480.00
TEP Expense	37.10	7.50	0.00	37.10	90.00	72.46	90.00
WC Expense	217.64	420.00	280.04	4,139.49	5,040.00	4,920.42	5,040.00
Total Internal Programs Expense	4,722.09	2,762.50	1,507.22	29,305.06	33,300.00	34,364.51	33,300.00
Other Expenses	25.00	100.00	69.02	5,635.67	1,200.00	1,373.55	1,200.00
Software Support	0.00	1,444.93	1,416.67	15,583.33	17,084.74	17,000.01	17,084.74
Staff Development & Training							
Conference Expenses	0.00	0.00	0.00	10,421.52	12,250.00	12,136.31	12,250.00
Dues and Subscriptions	682.30	755.00	740.84	17,425.25	17,704.00	17,432.56	17,704.00
Meeting Expense	177.68	395.00	1,078.17	4,019.90	4,740.00	4,685.23	4,740.00
Publications	0.00	40.00	0.00	1,941.23	720.00	717.83	720.00
Training Expense	438.87	500.00	-1,037.30	13,878.25	9,000.00	5,587.59	9,000.00
Total Staff Development & Training	1,298.85	1,690.00	781.71	47,686.15	44,414.00	40,559.52	44,414.00

14th Judicial Circuit Solicitor's Office Profit & Loss Budget Performance

	Jun 13	Budget	Jun 12	Jul '12 - Jun 13	YTD Budget	Jul '11 - Jun 12	Annual Budget
Transportation Expenses							
Insurance Auto	919.16	1,014.46	925.08	11,848.01	12,173.52	5,175.37	12,173.52
Licenses & Taxes Auto	0.00	25.00	0.00	253.00	300.00	347.00	300.00
R&M Auto	1,268.74	1,150.00	3,234.78	21,895.00	13,800.00	16,620.14	13,800.00
Travel	4,126.54	3,540.00	2,949.15	43,129.10	42,480.00	41,042.41	42,480.00
Total Transportation Expenses	6,314.44	5,729.46	7,109.01	77,125.11	68,753.52	63,184.92	68,753.52
Volunteer Expense	0	0	0	687.92	0	0	0
Total Miscellaneous Circuit Expenses	34,438.73	28,350.42	32,029.52	412,295.75	392,590.41	381,533.58	392,590.41
Payroll Expenses							
Contractual	10,833.32	2,500.00	4,320.40	78,366.05	30,000.00	51,586.50	30,000.00
Insurance	26,819.11	19,955.80	22,251.10	244,589.56	239,469.60	231,386.99	239,469.60
Medicare	2,069.48	2,226.07	2,217.47	26,982.98	28,938.97	29,268.13	28,938.97
Retirement	16,348.90	15,623.10	15,565.67	208,533.06	203,100.89	204,807.81	203,100.89
Salaries & Wages	151,958.26	161,634.25	161,028.64	1,960,932.60	2,101,245.72	2,119,968.07	2,101,245.72
Social Security	8,849.13	9,520.80	9,481.53	114,748.97	123,770.16	124,615.50	123,770.16
Unemployment	252.62	0.00	404.37	7,568.40	8,290.80	8,705.05	8,290.80
Worker's Compensation	3,024.00	2,683.16	2,673.12	36,781.96	34,881.19	37,442.24	34,881.19
Total Payroll Expenses	220,154.82	214,143.18	217,942.30	2,678,503.58	2,769,697.33	2,807,780.29	2,769,697.33
Net Income	235,565.69	232,893.01	311,110.49	40,654.42	-184,800.88	19,853.17	-184,800.88
Depreciation Expense	89,516.00	52,846.59	87,940.06	89,645.15	52,846.59	87,940.06	52,846.59
Net Income after Depreciation	146,049.69	180,046.42	223,170.43	-48,990.73	-237,647.47	-68,086.89	-237,647.47

FY 2015 BOER Budget Template

	FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
General Fund Revenues	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>
Expenditures				
Personnel	\$519,036.00	\$524,869.00	\$524,869.00	\$ 552,350.00
Purchased Services	\$175,700.88	\$122,991.00	\$122,991.00	\$123,141.00
Supplies	\$42,750.00	\$84,948.00	\$84,948.00	\$71,294.95
Capital	\$35,000.00	\$0.00	\$0.00	\$49,950.00
Subsidies				
Contingency				
Unclassified				
Transfers Out ¹				
Total Expenditures	<u>\$ 772,487</u>	<u>\$ 732,808</u>	<u>\$ 732,808</u>	<u>\$ 796,736</u>

FTEs:

1 - Please provide detail as to what special revenue funds the transfers are being made to.

Beaufort County Board of Elections & Registration

Our office does not have “General Fund Revenues,” nor under Expenditures the categories of : Subsidies, Contingency, Unclassified or Transfers Out¹

Beaufort County Board of Elections & Registration Personnel

FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
\$591,036.00	\$524,869.00	\$524,869.00	\$552,350.00

Beaufort County Board of Elections & Registration

Purchased Services

FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
\$175,700.88	\$122,991.00	\$122,991.00	\$123,141.00

Beaufort County Board of Elections & Registration

Supplies

FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
\$42,750.00	\$84,948.00	\$84,948.00	\$71,294.00

Beaufort County Board of Elections & Registration

Capital

FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
\$35,000.00	\$0.00	\$0.00	\$49,950.00

Beaufort County Board of Elections & Registration

Totals

FY 2013 Actual	FY 2014 Budget	FY 2014 Projected	FY 2015 Proposed
\$772,487.00	\$732,808.00	\$732,808.00	\$796,736.00

ADD-ONS

The document(s) herein were provided to Council for information and/or discussion after release of the official agenda and backup items.

Topic: Santa Elena
Date Submitted: April 28, 2014
Submitted By: Stu Rodman
Venue: Finance Committee

Santa Elena

“Epicenter of Early European Colonization & Conflict in North America”

- **The early 15th Century found the Spanish establishing its Caribbean-oriented empire and exploring the interior of North America. The Spanish were unsuccessful in establishing settlements in Florida as were the French in Quebec.**
- **Explorers identified Port Royal, between Parris Island and Hilton Head Island, as the best, deep water harbor along the southeast coast of what is now the United States. It was accordingly named Port Royal by the French and is one of the longest named sites in the New World. Three hundred years later, the Union won the Battle of Port Royal, its first victory in the Civil War as it established its headquarters and provisioning station for blocking the Confederacy.**
- **The Spanish, believing “to settle is to conquer,” planned and settled Santa Elena as the “Capital of La Florida” in 1566 on present day Parris Island adjacent to Port Royal. Spain’s first settlement in the United States included families with women playing a significant role for the first time in the United States.**
- **The French had established Charlesfort on the Santa Elena site in 1562. It was a small garrison that was abandoned the same year as the inhabitants, fearing they had been abandoned, built a boat and sailed to Europe. In 1564 the French established Ft. Caroline at Jacksonville which was destroyed by the Spanish the next year.**
- **As the Spanish sailed to Santa Elena they established a military garrison at St. Augustine in 1565.**
- **For 10 years, from 1566 to 1576, Santa Elena was the Capital of La Florida.**
- **In 1576, never having been able to establish friendly relationships with the Indians in the area, the settlers were evacuated to St Augustine and Santa Elena was burned.**
- **In 1577 Santa Elena was re-settled and existed for another 10 years until 1587. However, the Capital of La Florida remained in St Augustine.**
- **During the twenty years that Santa Elena existed as a city, it was typical of a Spanish city with hundreds of inhabitants living a somewhat normal Spanish life under adverse conditions.**

- During the period between the two settlement periods, a French ship sank off the coast and a small French garrison was again established at the site of Santa Elena. The inhabitants subsequently fled inland.
- During this second settlement period, the Spanish were unsuccessful in establishing a settlement on Chesapeake Bay to the north and the English were unsuccessful in settling Roanoke Island (Lost Colony) in North Carolina. Sir Francis Drake began threatening the Spanish Empire.
- When Drake burned St Augustine, the Spanish realized they could not maintain both Santa Elena and St Augustine, their only two settlements in what is now the United States. Santa Elena was abandoned and the settlers removed to St Augustine.
- From 1562 to 1577, Santa Elena was at the focal point of both Spain and France with two Spanish settlements, two Spanish forts and two French forts.
- As the French interest waned, Santa Elena was caught in the emerging power struggle between England and Spain.
- Thus, in the last half of the 15th Century, Santa Elena was at the center of conflict and ambitions of the Spanish, French and the English Empires.
- In the next century, the English settled Jamestown and Plymouth and the Spanish remained in St Augustine, thus establishing the initial colonial configuration of the United States.
- For 400 years Santa Elena was “lost.”

Current Status

- Recently Santa Elena was “found;” a small percentage of the artifacts believed to be buried were recovered; and the location and layout of the two settlements and the forts were established.
- Santa Elena is a recently discovered, undeveloped, national treasure.
- The archeological community strongly favors continued exploration and there is a significant risk that continuing erosion will destroy Charlesfort.
- The historical community, including the National Park Service and the Spanish Government, is anxious to tell the story.
- Marine Corps Recruit Depot, Parris Island, the site of Santa Elena, is engaged in the project to insure that their Mission is not compromised as 1) the erosion is contained, 2) the site is archeologically explored, and 3) the rich history is shared with the country and the world.

Topic: Tourism, Culture, Heritage = Sustainable Economies
A White Paper for County Administrator

Date Submitted: April 28, 2014

Submitted By: Stu Rodman

Venue: Finance Committee

"Tourism + Culture + Heritage = Sustainable Economies"

"TOURISM+ CULTURE + HERITAGE = SUSTAINABLE ECONOMIES:"

A White Paper for Beaufort County Administrator, Gary Kubic

Prepared by Beaufort County Staff:

Ian Hill, MA, Historic Preservationist, Planning Department

Dennis Adams, MA, MLS, Information Services Coordinator, Beaufort County Library

Grace Cordial, MLS, SL, Beaufort District Collection Manager, Beaufort County library

August 2011

"Tourism + Culture + Heritage = Sustainable Economies"

Executive Summary

The "General Overview" considers elements and characteristics of today's heritage tourism industry, including a brief discussion of recent changes and tourist traits.

The "Principles of Heritage Tourism" section discusses international statements on characteristics of a sustainable, authentic, high quality heritage tourism experience.

"Strategic Segmentation of a Heritage Market" entails a combination of subjective and objective criteria to identify the most profitable target audience for the promotion and development of a given heritage destination.

"Spatial Impacts on Quality and Sustainability" examines the important differences in behavior between *tourists* (visitors with hotel accommodations within the heritage core of a destination) and the *excursionists* who commute from hotels in the periphery. Excursionists' spending habits and lower standards can have a negative impact on the heritage economy and its resident community. This report includes an example of actual selected data for secondary resources in the core and peripheral areas of the Beaufort Historical District.

The various "Attitudes of Residents toward Heritage Tourism" depend on socio-economic factors and perceptions of harmful or beneficial consequences of the industry.

"Personal Observations of Two Heritage Destinations" was written by Dennis Adams upon reflection of his recent vacation to the Shenandoah Valley and the Great Smoky Mountains.

The "Inventory of Heritage Tourism Sites and Organizations" is a list of sites, institutions, and organizations present in Beaufort County as of August 2011 which should be included in any further discussions on heritage tourism as an economic engine for diversification and growth in our local community.

- Ongoing tours and events
- Projects in development
- New initiatives

"Challenges of Heritage Tourism" offers cautions for managers and planners interested in sustainability.

"Recommendations" offer suggestions of the committee regarding promotional activities, leveraging our assets, collaborating with others, and establishing a sustainable heritage tourism model of economic development.

"Prospective Funding Sources for Heritage Tourism"

Conclusion

Notes

Appendix: Potential Topics for "A Beaufort County Minute"

General Overview¹

"Heritage tourism" goes back as far as ancient Rome, Medieval pilgrimages and the "Grand Tours" of the 1700s. The advent of modern "heritage tourism" in America can be traced from the promotion of historic sites in the Southeast beginning about 100 years ago. The organization most closely identified with the concept of "heritage tourism" in the United States is the National Trust for Historic Preservation. That organization coined the equation used as the title for this White Paper: "TOURISM+ CULTURE + HERITAGE = SUSTAINABLE ECONOMIES" in 1993.

The term, "heritage tourism" came into common usage in Europe in the 1970s. In the past decade, countries in Asia and Africa have begun promotion of "heritage tourism," exploiting their unique elements of local culture or nature to enhance their economic situation, too. Therefore, "heritage tourism" is a global concept with broad appeal to travelers, entrepreneurs, and to all levels of government as a tool for local, regional, and national economic development.

Examples of the elements of modern heritage tourism include:

- Historic buildings and monuments
- Sites of important past events, like battles
- Traditional landscapes and indigenous wildlife
- Language, literature, music and art
- Traditional events and folklore practices
- Traditional lifestyles, including food, drink and sport
- Local holidays and festivals

These assets – whether tangible or intangible – may be owned and managed by public entities (for education or leisure), the private sector (for motives of profit), volunteer organizations (often as means to fund another objective) or by nobody in particular. While some heritage products are totally authentic, others may be far less so.

The heterogeneity of the industry results from:

- The relative degree of a given tourist's interest (on a scale from obsession to little-or-no interest)
- Proximity of the target audience (from day trip to long-distance airline travel)

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- Whether the heritage appeals to an international, mainly national or just a local audience
- Segmentation by age, sex, class and race
- Mass-market appeal versus niche markets
- Differences of people's ability and willingness to pay

The product of heritage tourism has changed in many particular regards in the last three decades of the 20th century, with:

- Open-air museums, based on traditional architecture, industrial heritage and social history.
- Heritage centers that tell the story of an area or a specific theme, often using innovative media.
- "Living history" where paid or voluntary "interpreter" dress in costume and explain sites and events to visitors, perhaps in the language of the appropriate period.
- More imaginative, user-friendly and entrepreneurial approaches by traditional museums, due to competition from heritage centers and funding pressures.
- Heritage tourism as a tool of regional and economic policy with the development of historic docklands and the use of rural traditions and gastronomy.
- The exploitation of scientific and technological heritage to attract visitors.
- The linking of the arts and heritage to create new tourist attractions.
- Conservation and enhancement of the environment of whole towns or cities in order to increase their attractiveness as heritage destinations.
- Highlighting the natural environment and wildlife heritage with wildlife "watching" and conservation holidays.
- Car and walking trails linking heritage attraction sites.
- Increased interest in social history (the story of "the Common Man" versus the heritage of the few, or the "history of Kings and Queens").

Specific reasons for the growth of heritage tourism (as opposed to that of tourism in general) include:

- Higher levels of education
- Mass-media marketing of heritage themes
- Travel and heritage-themed books
- New types of heritage tourism products
- The status that individuals and society attach to heritage tourism
- A growing desire to learn something new while traveling

In sum, travelers who engage in cultural tourism have become increasingly sophisticated, while groups that seek to provide cultural tourism services are becoming more knowledgeable about the impacts and opportunities that the industry offers. Given this state of affairs, certain aspects of heritage tourism, most commonly termed public history and/or applied folklore are destined to become prominent within the cultural tourism arena. Beaufort County is rich in

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both public history and applied folklore as demonstrated in the wealth of heritage sites and organizations listed in the "Inventory" section. We are particularly strong in antebellum structures and Civil War and Reconstruction political and social history.

Heritage tourism consumers' motivations include:

- Status
- An inexpensive outing for the family
- An opportunity to learn something new
- Relaxation
- Healthy exercise
- Nostalgia
- Esthetic pleasure
- Exhilaration and excitement
- An awe-inspiring experience
- Entertainment
- Participation in activities
- Meeting like-minded people

Principles of Heritage Tourism²

The idea that heritage is an industry was most influentially postulated by Robert Hewison in his *The Heritage Industry: Britain in Decline* (1987). The economic nature of heritage is now accepted and fuels serious debate about how to best achieve monies from heritage sites while maintaining the sites into the future.

An article, "Heritage as Business," written by Johnson and Light as a chapter in *Heritage, Tourism and Society*, discusses the traditional, economist's division into demand, supply and market, and speculates on the extent to which the supply of heritage sites has reached an optimal point with respect to demand. The article argues that heritage is a commodity, with a price, to be traded between producers and consumers, the latter including locals and students as well as tourists. Indeed, they argue that heritage can be increased on demand, as scholars begin identifying hitherto unrecognized heritage sites and cultures for theses and dissertations. As a local example, the production of dissertations and theses on topics of Gullah culture in the past 15 years in conjunction with greater publicity for the Penn Center Heritage Days Festival, the Gullah Festival in May each year, and the Native Islanders Festival in February, has definitely made Gullah culture a recognizable local heritage tourism commodity and heritage tourism related business enterprises have arisen from its greater recognition as a distinct and interesting culture to explore. Because heritage can be increased on demand in some respects, heritage is not a finite resource; but, individual pieces of it may be irreplaceable.

"Tourism + Culture + Heritage = Sustainable Economies"

How can a community in need of economic revitalization and holding heritage commodities maintain a sustainable balance between conservation, preservation, and income?

One of the primary concerns of the conservation community has been the disconnect between exploitation of a cultural heritage resource and the costs of preservation and sustainability of that cultural heritage resource. Seeking to mediate the necessary dialog, ICOMOS (the International Commission of Monuments of Significance) produced the Cultural Tourism Charter in 1999. The ICOMOS charter has, in many ways, become the model for the subsequent formulation of cultural heritage tourism protocols. It defines heritage as follows:

- At the broadest level, natural and cultural heritage belongs to all people. We each have a right and responsibility to understand, appreciate and conserve its universal values.
- Heritage is a broad concept and includes the natural as well as the cultural environment. It encompasses landscapes, historic places, sites and built environments, as well as biodiversity, collections, past and continuing cultural practices, knowledge and living experiences.
- Heritage records and expresses the long processes of historic development, forming the essence of diverse national, regional, indigenous and local identities and is an integral part of modern life.

ICOMOS determined that heritage tourism can capture the economic characteristics of the heritage and harness these for conservation by generating funding, educating the community, and influencing policy. It is an essential part of many economies and can be an important factor in development, when managed successfully. Tourism itself has become an increasingly complex phenomenon, with political, economic, social, cultural, educational, bio-physical, ecological and aesthetic dimensions. The achievement of a beneficial inter-action between the potentially conflicting expectations and aspirations of visitors and host or local communities, presents many challenges and opportunities.

The ICOMOS Scientific Committee responsible for the passage of the charter set forth six governing principles:

1. Since domestic and international tourism is among the foremost vehicles for cultural exchange, conservation should provide responsible and well managed opportunities for members of the host community and visitors to experience and understand that community's heritage and culture at first hand.
2. The relationship between heritage places and tourism is dynamic and may involve conflicting values. It should be managed in a sustainable way for present and future generations.
3. Conservation and tourism planning for heritage places should ensure that the Visitor Experience will be worthwhile, satisfying and enjoyable.

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4. Host communities and indigenous peoples should be involved in planning for conservation and tourism.

5. Tourism and conservation activities should benefit the host community.

6. Tourism promotion programs should protect and enhance natural and cultural heritage characteristics.

In the United States, the National Trust for Historic Preservation has taken the lead in fostering sustainable cultural heritage tourism. The National Trust's definition of cultural heritage tourism is "traveling to experience the places and activities that authentically represent the stories and people of the past and present. It includes historic, cultural and natural resources." In 1993, as part of an intensive three-year initiative funded by the National Endowment for the Arts and American Express, the National Trust for Historic Preservation developed five guiding principles for successful and sustainable cultural heritage tourism programs within the United States:

Principle One: Collaborate By its very nature, cultural heritage tourism requires effective partnerships. Much more can be accomplished by working together than by working alone.

Principle Two: Find the Fit between the Community and Tourism Cultural heritage tourism should make a community a better place to live as well as a better place to visit. Respect carrying capacity so everyone benefits.

Principle Three: Make Sites and Programs Come Alive Look for ways to make visitor experiences exciting, engaging and interactive.

Principle Four: Focus on Quality and Authenticity Today's cultural heritage traveler is more sophisticated and will expect a high level of quality and an authentic experience.

Principle Five: Preserve and Protect Resources Many of your community's cultural, historic and natural resources are irreplaceable. Take good care of them, if they are lost you can never get them back.

Strategic Segmentation of a Heritage Market³

Strategic segmentation allows any destination to consider aspects that improve the satisfaction of a particular group of its clients in order to specialize in providing a far more professional, complex and differentiated service to greater depths. This generates a competitive advantage because:

1. The area of competition of the destination is reduced only to those who have chosen to specialize in the same segment.

"Tourism + Culture + Heritage = Sustainable Economies"

2. The destination can concentrate its effort on improving the product in specific ways, rather than trying to provide everything to everyone at a resulting higher cost.
3. Marketing efforts can focus on a single segment of demand, providing a more effective message to that selected segment through a choice of correspondingly most effective communication channel.
4. The tourists who have enjoyed a vacation in a destination that meets their special needs will probably be more satisfied with their stay, and therefore either visit that destination again or at least promote it to friends or close relatives.

There are four essential types of selection criteria:

1. **Socio-demographic**, using such criteria as gender, age, education or income;
2. **Geographic**, the tourists' state or country of origin;
3. **Behavioral**, including vacation activities, choice behavior, general vacation habits (how often the tourists go on vacation, length of stay, *etc.*), expenditure, or similar items of information;
4. **Psychographic**, such as travel motivation, guest satisfaction, or lifestyle statements.

Because not every type of market segmentation is valid, however, segments obtained by the process should satisfy the following criteria in order to ensure the usefulness of results:

1. The members of a segment should be as similar to each other as possible, while each segment should be as different as possible from other segments;
2. The segment should match the strong points of the destination;
3. The segment should be identifiable;
4. The segment should be accessible to enable destination managers to communicate effectively with tourists;
5. A segment should be of a size that is in accordance with the objectives, strengths and potential of the destination.

Often, the variables used to segment tourist groups are subjective (lifestyles, expectations, level of satisfaction and motivation). This is a generally advantageous approach with limitations, however, in establishing specific marketing strategies targeted at specific groups of demand; this requires objective variables (social, demographic, geographic, economic, *etc.*).

Continual evaluation of customer demand informs managers of the type of tourist they find most profitable, either in the light of the specific destination's type and capacity of offering or by reorienting the production process in a way that better responds to the expressed need and demands of the tourists.

If for example, the target audience is tourists over 50 years old, the heritage destination should consider an effort of investment and additional personnel to assist customers with greater dependence than other age groups, changes in restaurant menus to accommodate special dietary requirements, extending visiting hours to tourist attractions and resources, *etc.*

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In addition to the physical adaptations, the destination may also require changes in the content of its offerings (*e.g.*, less emphasis on museums and more stress on cultural events) with a gradual transition in the current tourist profile, toward a deeper appreciation of the destination's architectural and historical heritage and cultural intangibles – resulting in an increase of the tourists' spending.

Spatial Impacts on Quality and Sustainability⁴

Deterioration of the *quality* of the travel experience can erode the utility delivered by heritage goods: bad food, impolite personnel or overly crowded transportation ultimately detract from the heritage goods that attracted the visitors in the first place. The stagnation and decline of tourism ensuing from a depletion of the qualities of places is clearly unsustainable because it affects the very viability of heritage as an economic resource. Lack of quality control in many attractions has already brought predictions of over-saturation and decline in the heritage tourism industry in other places.

The spatial characteristics of a visit to a heritage destination are vital to the success of a destination as a high-quality attraction. They affect visitor's appreciation of both the primary heritage products (the landmarks generally supplied by not-for-profit or public entities) and the secondary products supplied by the commercial tourism industry. In a time of budget cuts, public agencies can partner with private and voluntary entities to manage heritage sites to the benefit of tourists, residents, and local communities.

A heritage site often consists of a *core*, or *historical center*, where all the primary attractions are located, and of a *periphery*, or *tourist region*, lacking historical features but accommodating tourist facilities such as hotels, serving the tourist functions of the core. As long as the periphery accommodates visitors and earns tourist revenue, it is a part of the tourist system centered on the core, regardless of its size. (The tourist is defined as a person who stays in the area for more than 24 hours or spends two successive nights within the historical center.)

In general, tourists decide to visit a heritage destination on quantity and quality of its *primary tourist goods* (the cultural and historical attractions), which are sold at cost or even below cost. Demand for heritage goods is relatively inelastic, because they are marked by a high grade of uniqueness (For example, the canals of Venice will not appeal to a tourist seeking the monuments of Rome. Similarly, a Beaufort County tourist interested in experiencing Gullah culture may not visit the military focused Parris Island Museum).

Primary goods must be consumed in combination with *secondary* or *accessory* tourist goods, which are almost always sold in a monopolistic market (assured by limitations of the premises near a given attraction, an advantage enjoyed by suppliers). Monopolization is stronger in heritage centers than in more diffused attractions like mountain resorts. So the overall quality of the tourist experience depends on the "given" quality of the heritage/cultural content of the visit as well as on a variable component that depends on the suppliers' marketing strategy. This

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means that the quality of the experience may deteriorate if secondary goods of low quality are supplied, regardless of the quality of the primary attractions.

Visitors who stay in a central accommodation are called *tourists* or *central visitors*, while those in hotels in the peripheral region are called *excursionists* (they behave just like commuters, reaching the destination by day and returning "home" at night). Although the physical capacity of the historical core is physically limited and/or restricted by ordinances, expansion in the periphery is unlimited. Visitors trade off the higher hotel prices in the center for the lower prices of the periphery, discounting for transportation costs.

However perfect the information available on the cultural heritage of a destination (in guidebooks, press articles, educational programs, the Internet, *etc.*), there may be inferior information about the secondary goods that are typical "experience goods." Commuting time also limits most excursionists' visits to the most central attractions and restricts the amount of tourist goods they can consume.

Because these visitors lack the time to assess the quality of available secondary goods by learning through comparison of inventories and places, there results a great disparity in the attitudes between excursionists and central-core tourists, affecting the relative appreciation of secondary goods and the likelihood of repeated visits to merchants in the tourism center.

It is the variable quality of the secondary products and not the "given" primary attractions that affect the class of visitors to any destination. If there is insufficient demand for high-quality goods, cheaper items will predominate, attracting visitors who will lower quality standards. Although the volume of visits will continue to be heavy, the market profile will downgrade – an outcome that may not eventually be sustainable. The decline also worsens conditions for a community's residents, whose demand overlaps with that of tourists for many elements of the tourist package (e.g., food) if a complementary industry does not compensate for losses.

As long as a destination is popular among high-spending and high-demanding visitors, it will continue to generate high revenues, but revenues will decline as less-sophisticated tourists take over and reduce the destination's capacity to attract higher-quality customers. Rather than undefined "safety nets," subsidies of high-quality tourists products would be the better use of any government support funds – measures like "quality labels" that identify providers of certain types of high-quality, original goods and services respecting a set price list. Creative use of information technologies could also increase excursionists' appreciation of high-quality secondary products available in the heritage center. Tourism revenues should also be distributed with the peripheral areas of a heritage destination instead of only within the cultural core (e.g., Charles Towne Landing).

Here in Beaufort County, heritage tourism planning would benefit from analysis of secondary resources within both the core and peripheral areas of historical districts and beaches. The *ReferenceUSA* database, freely available to residents from the Beaufort County Library, provides immediate data like those in the following table:

Beaufort Historical District Hotels in Central Core (0.5 mile radius) and Periphery (0.5 miles +)



Attitudes of Residents toward Heritage Tourism ⁵

Attitudes of local residents have a key influence on tourism impact. Factors influencing residents' perceptions may include:

- (1) Level of tourism development;
- (2) Economic dependency on tourism;
- (3) Distance from place of residence to tourist areas;
- (4) Level of contact with tourists;
- (5) Respondent demographics;
- (6) Community attachment;
- (7) Use of outdoor recreation facilities;
- (8) General economic conditions of a community;
- (9) Perceived ability to influence tourism decision;
- (10) Knowledge of tourism;
- (11) Political self-identification;
- (12) Influence of a tourism public relations campaign.

Still other factors may include:

- (1) Social interaction with tourists;
- (2) Beneficial cultural influences;
- (3) Welfare impacts;
- (4) Negative interference in daily life;
- (5) Economic costs;

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- (6) Sexual permissiveness;
- (7) Perception of crowding.

Ways in which social demographics may influence residents' perception include:

- (1) Economic impacts;
- (2) The interaction between tourism and other sectors;
- (3) Life quality improvement;
- (4) General physical environment deterioration;
- (5) Beach degradation;
- (6) Sea water pollution;
- (7) Interruption of a quiet lifestyle.

Residents are likely to react differently to management strategies according to their occupation and their attitude toward tourism development. Providing more information about tourism development to residents would be the best strategy for managing tourism impacts. Residents who have engaged in tourism development or have a positive attitude toward tourism activities tend to welcome heritage tourism management strategies.

Personal Observations of Two Heritage Destinations: The Shenandoah Valley and the Smoky Mountains

by Dennis Adams, Information Services Coordinator, Beaufort County Library

The Shenandoah Valley is both a geographic and cultural region of western Virginia and the extreme northeast of West Virginia. As a tourism destination, the Great Smoky Mountains area extends from eastern Tennessee into western North Carolina.

Both destinations center on national parks, and promote their Appalachian heritage. By the 1700s, only a few American Indian settlements remained in the Shenandoah Valley, possibly because of tribal warfare, European diseases and conflicts with European settlers.⁶ The Smoky Mountains are, in contrast, the home of the Eastern Band of the Cherokee tribe. The Shenandoah Valley has a visible Mennonite population and the traditional star-shaped hex sign of that denomination can be seen on many homes and barns belonging to people outside the religion.

In view of these differences and similarities, I can express my opinion of contrasting features as a tourist after many visits.

Shenandoah Valley	Smoky Mountains
Appalachian heritage positively and accurately presented in most cases.	Hillbilly stereotype actively promoted, often in highly pejorative ways.
High-quality national park experience nearby.	High-quality national park experience nearby.
Negligible American Indian promotion.	Heavy promotion of American Indian heritage, of

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	<p>two distinct types:</p> <p>(1) Highly incorrect “Western movie” image, with corresponding clothing, teepees, tourist items;</p> <p>(2) Tribe-created, authentic recreations of the original Cherokee culture, as in the Oconoluftee “living village” museum (www.cherokee-nc.com/index.php?page=17)</p>
Affordable, high-quality resort accommodations available in mountain surroundings (e.g., Massanutten Resort and lodges on national park premises).	Expensive motels in urbanized settings (e.g., Gatlinburg, Pigeon Forge).
No gambling casinos.	Harrah’s Cherokee Casino in the immediate tourist zone adds a “vice” element to the experience.
Authoritative museums inside and outside the national park areas.	<p>Museums of two distinct types:</p> <p>(1) Openly for-entertainment establishments like Ripley’s Believe It Or Not and the Museum of the Unexplained;</p> <p>(2) Authoritative museums and displays in the national park areas and outside (e.g., Oconoluftee Village).</p>
No major amusement parks.	Dollywood.
Overall reliance on nature, Appalachian culture and Mennonite influence.	Theme attractions with eclectic themes unrelated to the area: Santa’s Land, Ghost Town in the Sky (cowboys and Indians), Christus Gardens, Dancing Waters and “panning for gold” in an area with no real history of prospecting.
Traffic moderate, with spikes during holidays.	Heavy highway traffic (congestion in Gatlinburg and Pigeon Forge) and gridlock that extends out past exits and onto interstate highway lanes on major holidays.
Creates a generally uncrowded impression.	Dense crowding (even on the sidewalks in Gatlinburg). Drivers profit from the snail’s-pace traffic in Gatlinburg and Pigeon Forge to “cruise” up and down the main streets – adding to the congestion. Tourists sit in motel balconies to watch the passing crowds.
Reliance on higher-quality handicrafts and antiques for tourist trade.	Low-quality, inauthentic souvenirs for a mass-tourism market. More costly items (jewelry, artifacts, minerals) tend to be overpriced.

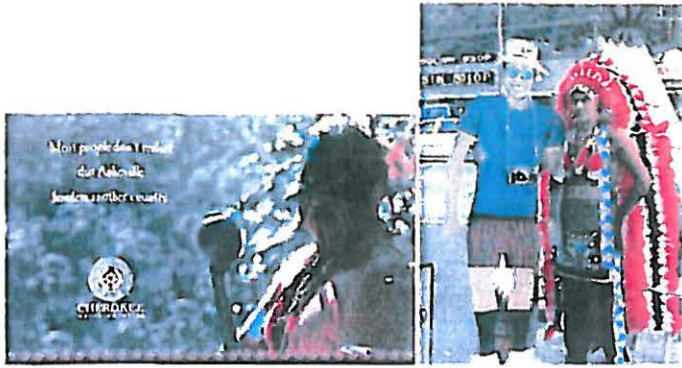
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Tourists consistently seek nature / authentic heritage experience during the day, retiring to lodges or motels at night.	Extended nightlife in Gatlinburg, Pigeon Forge and other towns permit visitors to visit commercial attractions and shop day and night, taking day trips the national park as quick “getaways.”
Landscapes well preserved and minimal impact by commercial development on surroundings.	Outside of the national park, there is dense, unsightly tourist-oriented commercial development; in Pigeon Forge a continuous strip mall along the main road that continues to grow into neighboring Sevierville.
Commercial limestone cavern attractions in area provide high-quality natural and recreational experience for families.	Commercial limestone cavern attractions in area provide high-quality natural and recreational experience for families
Although Abingdon, VA’s Barter Theater does not offer drama relevant to local heritage, it is itself part of local history; it opened in the Great Depression (1933), and audiences could bring food or other barter to pay for a ticket. The mainstream, popular offerings are appropriate evening entertainment for families.	Outdoor historical drama, <i>Unto These Hills</i> , is now in its 53 rd season in Cherokee, NC and is an entertaining cultural nighttime activity for families. <i>Horn in the West</i> in nearby Boone, NC is another long-running outdoor historical drama (about Daniel Boone).

As an older adult tourist, I much prefer the Shenandoah experience, which is the alternative that I would also accept for our community as a Beaufort County resident. As for the Great Smoky Mountains approach, a bank manager friend of mine used to take his small children each year to enjoy all the garish attractions. But when the children had grown older, his family no longer made the trip – not only had his sons lost interest in the attractions, but my friend perceived any further visits as an occupational liability. The Great Smoky Mountains destination was inappropriately “tacky” for a banking executive unless children were the reason for visiting.

There is, however, one Smoky Mountain attraction that I find very appealing and that would attract more heritage visitors to Beaufort County: the outdoor historical drama. County PIO Suzanne Larson successfully produced an expanded version of her play, *People of the Light*, as a benefit for the Friends of the Hunting Island Lighthouse in 2010; it centers on a lighthouse keeper’s family during the hurricane of 1893 and includes Clara Barton and a young Sea Islander orphaned by the storm. *People of the Light* is an ideal “vehicle” for additional music and dramatic situations. Ms. Larson has expressed interest in developing her play as outdoor heritage drama.

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Two approaches to heritage tourism in Cherokee, NC

Photo sources: (Left) www.cherokee-nc.com and (Right) www.brooksidemountainmistbb.com/cherokee.htm

Inventory of Heritage Tourism Sites and Organizations

Successful management of heritage tourism sites and activities requires collaboration among governmental agencies, not-for-profit institutions holding heritage tourism assets, and private enterprise to insure sustainability. Leveraging our current assets in such a way as to encourage collaborative ventures and attracting greater appreciation of those assets underlies our attempt to identify the major players and products mentioned below. However, we acknowledge that there may well indeed be other potential partnerships and collaborations to consider as we proceed towards heritage tourism as a tool for economic development.

Although the Beaufort County Historical Resources Consortium is a very loose confederation of sister cultural heritage agencies and organizations, conversations relating to heritage tourism plans and management can be effectively addressed under its umbrella. The BCHRC has cooperated in the past on Archaeology Month efforts, disaster preparation workshops, and has representatives from the library, archives, and museum communities in the county who have worked together on projects of mutual interest in the past. The Beaufort County Historical Resources Consortium (BCHRC) is a group of non-profit institutions with publicly accessible sites, collections and programs that relate to the diverse history of the Beaufort County, South Carolina. The Consortium seeks to preserve, link and promote the historical and cultural collections and sites that reveal Beaufort County's critical role in the region, state and nation by providing meaningful and engaging heritage and educational experiences. Member organizations include: Historic Beaufort Foundation; Beaufort County Library; Beaufort County Records Management; Beaufort County Planning; City of Beaufort Planning; St. Helena's Church; Parris Island Museum; Coastal Discovery Museum; Penn Center; Gullah/Geechee Sea Island Coalition; Heritage Library; Beaufort County Historical Society; Bluffton Historical Preservation Society, Inc.; Daufuskie Island Historical Society and USC-Beaufort. Membership is free and open to any non-profit institution in possession of heritage collections shared with the public on a regular, recurrent basis or by appointment within a reasonable period of time.

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ONGOING TOURS AND EVENTS

Archaeology Month:

Each October the SC Institute of Archaeology and Anthropology sponsors Archaeology Month throughout the State of South Carolina. For the past 7 years the Beaufort County Council has designated the month of October as "Archaeology Month in Beaufort County". The Beaufort County Library and Planning Department have worked together to present a variety of programs during the month including lectures, demonstrations, displays, and tours.

American Revolutionary War Trail:

The Lowcountry Council of Governments has created a tour of Revolutionary War sites in Beaufort, Colleton, Hampton, and Jasper counties. A brochure that includes a map and description of the sites is available at the Council of Governments, county offices, welcome centers, and other tourist destinations.

Beaufort County Government Buildings Historic Exhibits:

There are exhibits related to history in some county buildings. In the County Administrative Building there is an exhibit devoted to the history of the building's site and a history of Robert Smalls because at one time a school named after him was located on the site. There is also a photograph exhibit in the building of important tabby buildings in the Beaufort area. The County Courthouse has a "Freedom Shrine" of copies of many important documents related to the history of the United States. At various times in the year there are exhibits in County libraries as well.

Canopy Roads of Beaufort County Tour:

The Beaufort County Planning Department has created a tour and brochure of canopy roads in Beaufort County. The tour includes ten of the most beautiful roads in the county. The brochure includes a map and natural and historic information for each site. The brochure is available at Beaufort County offices, welcome centers, visitor's centers, and other tourist destinations.

Daufuskie Island Rob Kennedy Historic Trail:

The Daufuskie Island Historical Foundation has created a tour of historic sites on Daufuskie Island. It is named in honor of Rob Kennedy a long time island historian, island guide, and first president of the Foundation. The trail includes twenty historic sites. The brochure includes a map, details of each site, and a brief history of the island. The brochure is available at the Daufuskie Island Museum and other locations on the island.

Downtown Beaufort Tabby Tour:

The Downtown Beaufort Tabby Tour is a walking or driving tour that takes a route through the downtown area looking at 10 historic structures made of tabby. Tabby is the unique oyster based concrete that was used during the 18th and 19th Centuries in the Beaufort area as a building material for

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a variety of structures including homes, churches, commercial buildings and a seawall. Information regarding the tour can be found on the Beaufort County library's "Local History and Nature Pages" web site at <http://www.beaufortcountylibrary.org/htdocs-sirsi/tabby.htm>.

Seasonal Historic Tours:

In the Spring and Fall of each year, the Historic Beaufort Foundation, the Bluffton Historic Preservation Society, the Open Land Trust, the Port Royal Historic Foundation, the Beaufort Historical Society, and/or St. Helena Episcopal Church sponsor tours of area historic sites and buildings throughout the County. Information on the tours is available at the respective sponsors or at the Visitor Centers.

Historic Preservation Month:

The National Trust for Historic Preservation designates each May as Historic Preservation Month. The local historic and preservation groups as well as the County and municipalities have participated in events highlighting historic preservation in the area.

Museums:

There are several museums in Beaufort County devoted to the varied history of the county. The Coastal Discovery Museum on Hilton Head Island has a variety of exhibits regarding the history and ecology of Hilton Head. The Parris Island Museum at the US Marine Corps Recruit Depot is devoted to the history of the Marine Corps and Parris Island, including a display on the history of Santa Elena and Charlesfort. The Port Royal Historic Foundation Museum in the Union Church depicts the history of Port Royal and the church. Two planned museums will be opening in the coming months, the Beaufort Museum will reopen in the Beaufort City Hall in the Fall and the Gullah Museum on Hilton Head is planned for a January 2012 opening.

Permanent Historic Building Tours:

There are several historic buildings in Beaufort County open to the public. These include the Verdier House in Beaufort, the Heyward House in Bluffton, the Union Church in Port Royal, and the Hunting Island Lighthouse Complex. The sponsoring groups and Visitor Centers in the area have information regarding the tours.

Research Facilities:

A number of facilities in the County offer opportunities for genealogists and historic researchers. They include the Beaufort District Collection of the Beaufort County Library, the Heritage Library on Hilton Head, the libraries on the North and South campuses of the University of South Carolina-Beaufort, and at Penn Center.

Shell Rings:

There are a number of shell rings open to the public in Beaufort County. Shell rings are prehistoric rings of shell, bone and other materials dating from the Late Archaic Period 5,000-3,000 years ago that are

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found along the coast normally near tidal creeks. The exact meaning of shell rings is debated by archaeologists. However it appears that they may have had some ceremonial use along with being a place to dispose of the materials in them. Shell rings open to the public include the Green Shell Ring managed by Beaufort County PALS and the Sea Pines Preserve Shell Ring managed by a private foundation on Hilton Head Island. The Coosaw Shell Ring on Coosaw Island and the South Bluff Heritage Preserve Shell Ring on Lady's Island, are managed by the SC Department of Natural Resources, Heritage Trust Division.

PROJECTS IN DEVELOPMENT

Logo for Beaufort's History:

The Beaufort County Planning Department is designing a logo that could be used to promote historic sites and events in the County.

QR CodeTour:

QR (Quick Response) is a means by which owners of Smart Phones and other electronic devices can by click on a bar code located on a building or site in order to access media providing information about the place. Beaufort County is currently designing a QR Tour that will include six historic sites in the County: Old Sheldon Church Ruins in Northern Beaufort County, the Corners Community, Penn Center, and Fort Fremont on St. Helena Island, and St. Luke's Church in Pritchardville.

(County Departments involved are the Clerk to Council Office (Alexis Garrobo), Beaufort County Library, Planning, and Public Works.)

Historic Driving Tour:

The County Planning Department is planning and designing a driving tour of historic sites in Beaufort County. A brochure that will include a map and information on the sites will be available at all visitor locations and County buildings. The QR Code sites will be included in the tour.

(The Beaufort County Library would provide a link to the "Historic Driving Tour" and/or host the "Historic Driving Tour" documents on our web site.)

Development of County Owned Historic Sites:

Beaufort County purchased three historic sites using County Rural and Critical Land Funds.

- Altamaha in the Okatie Community
- Garvin House in Bluffton
- Fort Fremont on St. Helena Island

Currently, the County has discussed the need for minimal facilities at Altamaha, an archaeological site that includes the remains of a Yamassee Indian Head Town. The County has also been in contact with the Town of Bluffton regarding the restoration of the Garvin House, a circa 1870 Freedman's house

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located in the Oyster Factory Park. The Town of Bluffton has financed a study to determine the cost of restoration and has stabilized the building. The County is planning the development of Ft. Fremont, a Spanish-American era pair of gun batteries (c.1898).

(County Departments involved are Planning, Facilities Management, Public Information Office, and Public Works. The Town of Bluffton (Garvin House) and the SC Department of Natural Resources (Altamaha) are also involved.)

The Beaufort County Rail Trail:

Beaufort County is working with municipalities and private groups to plan and finance a walking/riding trail to be located in the right-of-way of the now closed historic Port Royal Railroad that ran from Port Royal to the mainland at Yemassee. The entire 25+ mile length of the railroad roadbed has been cleared of tracks and ties. Current plans are for the trail to run from Ribaut Road in Port Royal to the Whale Branch in Seabrook, distance of 13.6 miles. The remaining 11.8 miles from Seabrook to Yemassee may be included in future plans.

(County Departments involved are Planning, Finance, Traffic Engineering, Public Works, Public Information Office, and Facilities Management)

The Gullah-Geechee Heritage Trail:

The Gullah-Geechee Heritage Trail is a federal government initiative to promote the culture and history of the Gullah-Geechee people who historically have lived along the coasts of North Carolina, South Carolina, Georgia, and northern Florida. South Carolina plays a key role in the trail with important sites in Beaufort, Charleston and the Sea Islands. Penn Center is a key component in the development of the trail. Currently the Heritage Trail Commission is completing a master plan.

NEW INITIATIVES

"A Beaufort County Minute" (or "Did you Know?" revised):

The idea for this comes from a suggestion by Mr. Kubic about a program he was involved in Ohio and by a SC Public Radio series called "Walter Edgar's Journal". We chose "A Beaufort County Minute" as the name for this proposed series of short one-to-two minute snippets of local history to air on the County Channel throughout the day. Local historians, citizens with specific knowledge of a topic, or County employees would give a brief presentation on an historic fact about the County. Several spots could be filmed with one person in order to efficiently use the time of County Broadcast Services. Spots could be filmed on an historic site or on a neutral site. Appendix 1 suggests a list of potential topics for "A Beaufort County Minute". There are certainly many other topics that could be discussed beyond what is on this list.

We believe that the County Channel is an ideal place for this because of its popularity in the County. This would be a way to provide locals, many of them new to the area, an opportunity to learn about the

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rich history of Beaufort County. Hopefully this would spur their interest in learning more about County history.

(County departments involved include Broadcast Services, Public Information Office, the Library, and Planning.)

Traveling Exhibits:

As noted above there are two exhibits in the County Administration Building and occasional exhibits in the libraries that are related to Beaufort County. We recommend that a schedule be adopted to begin rotation of these heritage tourism assets to additional locations throughout the County before June 30, 2012. Although the libraries are an ideal place to start, in time, we would hope that every major County building had a local history exhibit installed no less than once every two years.

(County departments that would need to be involved include the Beaufort County Library, Public Information Office, Facilities Management, Planning, and other departments with appropriate space and traffic to house such a traveling exhibit.)

Challenges of Heritage Tourism ⁷

The committee agrees with these statements from the National Trust for Historic Preservation:

- When a community’s heritage is the substance of what it offers visitors, protecting that heritage is essential. So a major challenge in cultural heritage tourism programs is insuring that increased tourism does not destroy the very qualities that attract visitors in the first place.
- Because tourism is a highly sophisticated, fast-changing industry, it presents its own challenges. Tourism is generally a “clean” industry; no smokestacks or dangerous chemicals. But it does put demands on the infrastructure—on roads, airports, water supplies, and public services like police and fire protection.
- But a challenge results not only from visitor impact, but also from visitor expectations of quality products and services. Tourism is essentially a service industry, which means it depends on the competence of people in many different jobs and locations. Tourism, while not a panacea, is an attractive form of economic development.

Recommendations

1. The National Trust for Historic Preservation’s five guiding principles of heritage tourism is a model statement that Beaufort County should consider adopting as its own. Therefore, the committee recommends that any effort to enhance or promote heritage tourism destinations and experiences must:

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- Be sensitive to racial, ethnic, socioeconomic and other issues in order not to reinforce prejudice, discrimination and resentment. Take care not to exclude one element of local heritage for the sake of another.
 - Beware of improper mass marketing that trivializes local traditions and fabricates a false heritage for the sake of entertainment.
 - Adopt sound heritage management practices (a blend of scholarly and marketing expertise, customer care, catering and interpretation technique) to avoid the creation of a mere theme-park attraction.
 - Stress traditional landscapes, authentic architecture and events and customs that have enjoyed many years of continuity.
 - Resolve issues of historic preservation versus restoration in a responsible and authentic manner.
 - Beware of overcrowding and overuse of an area that can overwhelm the local culture (as in "Pennsylvania Dutch Country") or fragile ecosystems.
 - Note that some structures once considered "ugly" structures are now considered "classics."
 - Avoid artificial "branding" with themes like "Pat Conroy Country" or "Gullah Country" that create a one-dimensional, unchanging stereotype.
2. We firmly recommend that the County Council hire a "heritage tourism" professional to guide the development of materials and strategies to mount a successful "heritage tourism" program leveraging our many and diverse heritage tourism assets. As this paper states repeatedly "heritage tourism" is a specific sub-set of the tourism field with its own demographics and characteristics. We need someone well versed in negotiating the challenges of heritage tourism and heritage site sustainability to assist the County in choosing the best path forward.
 3. We recommend that the County institutes a "Good Housekeeping" seal of approval program for recommended heritage tourism sites, businesses, tour guides, and/or vendors based upon standards established by a proposed "Heritage Tourism Board." Because the research indicates that management plans proceed better when all the stakeholders are involved, this Heritage Tourism Board should be made up of cultural heritage professionals, community residents, and business owners involved with heritage tourism. The National Trust's Five Principles would inform the board's decisions. Certification would be indicated by the logo under development by Teri Norris of the Planning Department.
 4. Locations to hold events, such as historical dramas or to set up tourist visitor centers, are few in number. From our brainstorming, we discussed several options regarding

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heritage tourism marketing sites at the points in which visitors enter the County, such as:

- a. Lobeco Branch Library – as a "First Stop" visitor/tourist guide distribution point on US 17/US 21
 - b. The intersection of US 278/170 at McGarvey's Corner
 - c. Airport kiosks at Hilton Head Airport and Lady's Island Airport
 - d. A central historical drama or other heritage tourism event could be considered for the Camp St. Mary's complex
5. Although the ongoing events and sites receive some degree of promotion from the sponsors, the Visitors Centers, PRT advertising, and other means, more could be done to bring attention to these assets.
- a. A tangible way the County helps promote many of these events and organizations is through Accommodation Tax Grants. Would it be legally possible to tie distribution of these funds to leverage a broader recognition of the variety of heritage tourism assets in the county?
 - b. The County could promote all of the above with short public service announcements on the County Channel.
 - c. We recommend exploring reciprocal heritage tourism marketing with neighboring Charleston, Savannah and Walterboro to enhance recognition of the heritage and cultural tourism assets of all our locations.
6. Because Altamaha, the Garvin House, and Fort Fremont are currently attracting increasing numbers of visitors with little publicity, Beaufort County should accelerate the development of these parks with improvements such as informational kiosks, dioramas, and bathroom facilities as finances allow.
7. Once the Gullah-Geechee Heritage Trail master plan has been finalized, we recommend that the County work with the Gullah-Geechee Heritage Trail Commission to promote the trail to insure that the history of the Gullah-Geechee people in Beaufort County is properly recognized.

Prospective Funding Sources for Heritage Tourism

Beaufort County does *not* qualify for a SC National Heritage Corridor Development Grant, which program assists only the following counties Abbeville, Aiken, Anderson, Bamberg, Barnwell, Charleston, Colleton, Dorchester, Edgefield, Greenwood, McCormick, Oconee, Orangeburg, and Pickens.

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The Cultural Tourism Explore website provides an A-Z listing of grant sources at <http://cultural-heritage-tourism.com/cultural-heritage-grants-funding/>

The national *Foundation Directory*⁸ had no listings for any aspect of travel or tourism, although the numerous entries in the subject index for "Recreation" may call for further investigation.

Although there are no travel or tourism entries in the online *South Carolina Foundation Directory* (9th edition, 2010 at www.statelibrary.sc.gov/docs/grant/foundation2010.pdf), a number of organizations are indexed under the related subject headings "Recreation" and "Historic Preservation."

Conclusion

Beaufort County has a unique and long history. It has wonderful cultural heritage assets that can be better leveraged to enhance the quality of life within the community. Accepted principles of heritage tourism management can lead to a sustainable and economically viable industry.

Notes

¹ Information in this section is from Sethi, Praveen "Heritage Tourism" (Chapter One) of *Heritage Tourism*. New Delhi: Anmol Publications Pvt. Ltd., 2005, pp. 1-19 and a review by Alf H. Walle of *Keys to the Marketplace Problems and Issues in Cultural and Heritage Tourism* edited by Patricia Atkinson Wells (Hisarlik Press, Middlesex, 1996, 142 pages) found in *Journal of Travel Research*, May 1999 v37 i4 p411(2). Business & Company Resource Center, DISCUS database, Article A54657597, Retrieved July 7, 2011.

² Information in this section is from *Keys to the Marketplace Problems and Issues in Cultural and Heritage Tourism*. (Book Review) Alf H. Walle, *Journal of Travel Research*, 0047-2875, May 1999 v37 i4 p411(2) Business & Company Resource Center, DISCUS database, Article A54657597, Retrieved July 6, 2011; *Heritage, Tourism and Society*. (Book Review) Howard Koch, *Urban Studies*, 0042-0980, August 1996 v33 n7 p1228(3), Business & Company Resource Center, DISCUS database, Article A18772041, Retrieved July 6, 2011; "Cultural and heritage tourism: whose agenda?" Russell Staiff, *Journal of Hospitality and Tourism Management*, August 2003 v10 i2 p142(15), Business & Company Resource Center, DISCUS database, Article A108277268, Retrieved July 10, 2011; and, "Cultural Heritage Tourism, Five Principles for Successful and Sustainable Cultural Heritage Tourism," webpage found at <http://www.culturalheritagetourism.org/fiveprinciples.htm>. This website is managed by the Cultural Heritage Tourism of the National Trust for Historic Preservation. Accessed July 20, 2011.

"Tourism + Culture + Heritage = Sustainable Economies"

³ Information in this section is from Pulido-Fernández, J., & Sánchez-Rivero, M.. (2010). Attitudes of the cultural tourist: a latent segmentation approach. *Journal of Cultural Economics*, 34(2), 111-129. Retrieved July 8, 2011, from ABI/INFORM Global. (Document ID: 2021471871).

⁴ Theoretical basis of this section is from Silvia Caserta, & Antonio Paolo Russo. (2002). More Means Worse: Asymmetric Information, Spatial Displacement and Sustainable Heritage Tourism. *Journal of Cultural Economics*, 26(4), 245-260. Retrieved July 8, 2011, from ABI/INFORM Global. (Document ID: 404942921). Practical application of local data conducted by Beaufort County researchers.

⁵ Information in this section is Ho, P. (2011). An Empirical Study of Residents' Attitudes to Tourism Impact Management Strategies. *Journal of American Academy of Business, Cambridge*, 17(1), 232-238. Retrieved July 11, 2011, from ABI/INFORM Global. (Document ID: 2368393731).

⁶ Sutcliffe, Andrea. *Touring the Shenandoah Backroads*. Winston-Salem, NC: John F. Blair Publishers, 2000. p. 117.

⁷ Information in this is section is from the "Cultural Heritage Tourism, Getting Started: How to Succeed in Cultural Heritage Tourism" webpage found at <http://www.culturalheritagetourism.org/howToGetStarted.htm>. This website is managed by the Cultural Heritage Tourism of the National Trust for Historic Preservation. Accessed July 26, 2011.

⁸ *The Foundation Directory, 2011 Edition*. Parts 1 and 2. New York: The Foundation Center, 2011.

"Tourism + Culture + Heritage = Sustainable Economies"

APPENDIX 1: Potential Topics for a "Beaufort County Minute" Segment On the County Channel

Altamaha	Santa Elena	Sea Foam
Beach Sand	William Hilton	Sea Islands, geology
John ("Tuscarora Jack") Barnwell	Henry Woodward	Snapping Shrimp
Robert Barnwell	Stuart Town	Sweetgrass baskets
Robert Woodward Barnwell	Lords Proprietors	Tides
Pat Conroy	Yamassee War	Snakes
"Tillie" Maude Odell Doremus	Rice	W. Somerset Maugham
Stephen Elliott	Indigo	Charlesfort
Joseph "Joe" Frazier	Cotton	Port Royal (all 3 of them)
Richard Fuller	Phosphate	Local fiction authors http://beaufort-library.wiki.zoho.com/Fiction-Authors.html
Kate Gleason	Secession Oak	Local nonfiction authors http://beaufort-library.wiki.zoho.com/Nonfiction-Authors.html
Thomas Heyward, Jr.	Oaks	Mitchelville
John Jakes	Battle of Port Royal Sound, 1861	United States Colored Troops
James Edwin McTeer	Battle of Port Royal Ferry, 1862	Missionary Teachers during the Civil War
Thomas Ezekiel Miller	Penn School	• Clara Barton
Robert Smalls	Parris Island Marine Recruit Depot	• Dr. Buzzard
J. I. Washington	Naval Hospitals (yes, plural)	Abbie Holmes Christensen
William John Grayson	Hunting Island State Park	Sam Doyle
Robert Barnwell Rhett	Hunting Island Lighthouse	William Elliott III
William Ferguson Colcock	Pinckney Island Wildlife Refuge	Charlotte Forten
Michael Patrick O'Connor	Historic Districts – Penn Center; Beaufort; Bluffton	Paul Hamilton
William Elliott	Fort San Felipe	Harriet Keyserling
Fire of 1907	Fort San Marcos	Leon Hirsch Keyserling
Burning of Bluffton, 1863	Fort Beauregard	Chlotilde Martin
Frogmore stew	Fort Walker	Rachel Mather
Fort Frederick	Fort Howell	Jean-Pierre Purry
Fort Fremont	Sheldon Church Ruins (new info to be released soon!)	James Reeve Stuart

“Tourism + Culture + Heritage = Sustainable Economies”

Origin of Beaufort's name	Chapel of Ease St. Helena	<u>Laura Matilda Towne</u>
" Hilton Head's name	Spanish Moss	<u>John Trask Sr.</u>
" Bluffton's name	Tabby	<u>Harriet Tubman</u>
Geography of area	Ghost stories	"Operation Jackpot"
Fort Lyttelton	Destroyed buildings – Gold Eagle Tavern, original Sea Island Motel	Bank Scandal of 1926
Gullah language	Lovebugs	Poems about Beaufort
Gullah culture	Lowcountry Native Americans	Avenue of Oaks
Heir's land	Marshes	ML King @ Penn Center
Pedro Menendez de Aviles	Movies in Beaufort	MCAS
Jean Ribaut	Pirates	Daufuskie Island
Huguenots	Sand gnats	Seabrook-truck farming
Hurricanes – 1893; 1940; Gracie; Floyd evacuation	History of the Sheriff's Department	Federal Occupation of Beaufort Amphitrite
John Cross Tavern	History of the Library	Presidential Visits

Topic: An Addendum to the White Paper
Tourism, Culture, Heritage = Sustainable Economies

Date Submitted: April 28, 2014

Submitted By: Stu Rodman

Venue: Finance Committee

"Tourism + Culture + Heritage = Sustainable Economies"



An Addendum to the White Paper

***by Dennis Adams, Grace Morris Cordial and Ian Hill
of the Heritage Tourism Research Committee
October 11, 2011***

Executive Summary of the Addendum

Since the submission of the original white paper in August, several additional concepts have come to the attention of the Heritage Tourism and Research Committee. The Committee provides this addendum to furnish new information.

Recent development in the S.C. Olympia Committee's effort to bring a historical battleship to Beaufort prompted the first section, "**Spanish-American War: Lynchpin of Military Heritage Tourism?**" The possible display of the ship in a new dry dock on Parris Island presents various heritage tourism opportunities.

Specific examples of revitalization of neglected properties constitute the third section, "**Derelict Chic.**" The following discussion, "**Catching the Overflow,**" examines the strategic advantage of Beaufort County's location between two highly popular, world-class tourist destinations.

"**Cultural Plazas**" considers how best to exploit the cottage industries and agriculture of our community toward a heritage experience of high quality and authenticity. The final section, "**Stay Constantly Updated,**" justifies its title with mention of the new National Park Service "Gullah / Geechee Cultural Heritage Corridor" web page.

Dennis Adams
for the Heritage Tourism Research Committee
October 11, 2011

Spanish-American War: Lynchpin of Military Heritage Tourism?

In September of 2011, the S.C. Olympia Committee submitted its plan to move the USS Olympia from the Delaware River to a potential new dry-dock facility on Parris Island. Best known for its use by Commodore George Dewey in the defeat of the Spanish fleet in Manila Bay in 1892 during the Spanish-American War, the ship also saw action in World War I. Although a number of other cities are competing for the Olympia, Committee member Pete Richards said that Beaufort, the smallest city to bid, has a "very strong connection to the Spanish-American War locally, and we feel like that is a very strong suit."



Beaufortgazette.com

Should the Independence Seaport Museum select Beaufort, there is still the issue of \$10 million in essential repairs to the ship. "The money is going to be a critical issue for us, as it will be for the other cities vying for Olympia," said Richards. "We should know within the next week or two whether we've made the cut. That'll be important for the fundraising. It's hard to raise money before you officially know you're in the game."¹

The most conspicuous local connection to the Spanish-American War is Fort Fremont on St. Helena Island. The fort, officially designated on the National Register of Historical Place in May of 2011, was built in 1892 to protect Beaufort and Port Royal Sound against a potential Spanish attack.²

Beaufort County purchased the property from private owners in 2004 for \$4 million, through its Rural and Critical Lands Program and the Trust for Public Lands. The Friends of Fort Fremont Historical Park's website (www.fortfremont.org) speaks of the facility's appeal to nature tourists as well as history enthusiasts:

"This important land acquisition contains one of the few remaining intact fortifications from the Spanish-American War era and preserves open space in an area that is experiencing environmental strains of rapid development. Located on St. Helena Island on the banks of the Beaufort River and Port Royal Sound, this 15-acre site is a prime example of a maritime forest unique to the coastal Sea Islands. The historic significance and natural setting of this property make it ideal for a community park and educational learning site.

"The Lowcountry Master Naturalist Association has been

working with the County to provide volunteer support to assist in planning and maintaining the site as a passive park. A key element in the master plan is to restore native plants to promote biodiversity, raise community awareness of plant conservation, and preserve the natural and historic legacy of the site. We worked with the Southcoast Chapter of the Native Plant Society and Daniel Payne of Naturescapes to select native and naturalized plants based on soil and light conditions and drought tolerance."

Moreover, *"the Fort Fremont park site has 900 feet of beach frontage on Port Royal Sound "* and *"three distinct elements which offer a unique and diverse opportunity to develop an outstanding passive park and historical learning site:*

- *The high bluff coastal view offers an unparalleled view of Port Royal Sound.*
- *The site provides wonderful passive park opportunities for experiencing a woodland forest preserve and green-space picnic areas.*
- *The Batteries offer educational and historic learning opportunities."*

The Olympia proposal has obvious parallels with Charleston's Patriot's Point Museum, a State of South Carolina enterprise agency that has become a popular tourist attraction since its opening on January 3, 1976. Starting as a permanent home for the World War II aircraft carrier, the U.S.S. Yorktown, the facility has expanded with other ships, a Medal of Honor Museum, a reconstructed Vietnam support base and a submarine memorial. Opportunities for similar development in partnership with the Parris Island Museum and the Quantico (VA) Marine Corps Museum hold much promise.

An obstacle to address is the strict military security at the Parris Island main gate (the only entrance to the base by land). The clearance procedure, intimidating to many visitors, and the flow of traffic on recruit graduation days hinder the potential for an Olympia battleship attraction. The military command, however, may be willing to accommodate civilian visitors to the site (and to the museum and Charlesfort / Santa Elena locations on Parris Island).

Access by water provides another alternative, with scenic boat tours between Parris Island and Fort Fremont, as well as from Hilton Head Island to the historic sites.

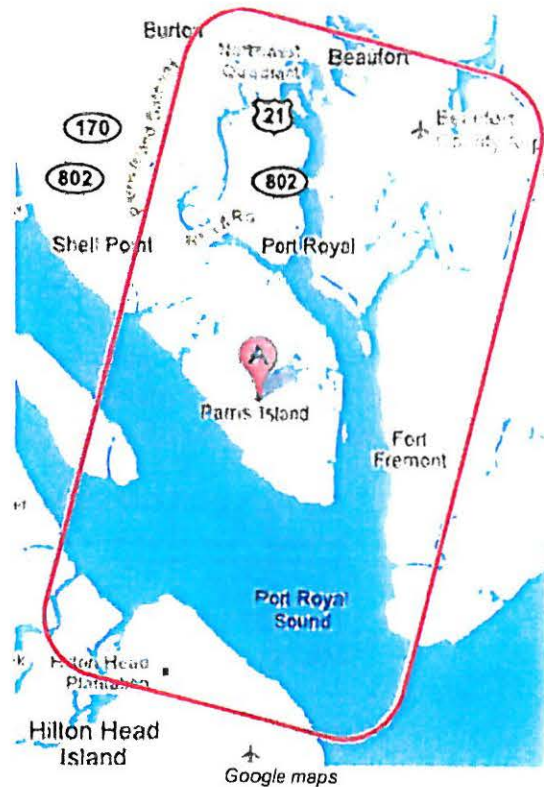
The map at right illustrates the proximity of the historic sites to each other and to potential docking sites for excursions from downtown Beaufort, the Town of Port Royal and Hilton Head Island. Local boat charter companies could profit from these geographic advantages with little or no retrofitting or additional investment.

Derelict Chic

Tourist areas like Underground Atlanta (formerly vacant warehouses), the Savannah Riverfront (one-neglect port storage buildings) Columbia SC's facelift of its railroad depots and the Canadian "old town" of Montreal are just a few of the more successful transformations of derelict real estate within the cities' historical core.

The municipalities of Beaufort Bluffton Village, with commercial architecture much older than development on Hilton Head and Okatie, stand at the greater advantage for this kind of renewal.

For example, the ongoing recovery Beaufort's Northwest Quadrant could be an excellent application of lessons learned in cities like Charleston and Savannah, as well as a needed commercial link between the now-separate Uptown and Downtown sectors of the city. The proposed "Rail Trail" that runs from the Town of Port Royal to the northern reaches of Beaufort County is much like the Congaree River Trail in the former mill district of Columbia, SC (and a similar recreational path in Montreal along a historic canal). Beaufort County's "Rail Trail" would afford many panoramic views of Lowcountry marshlands.

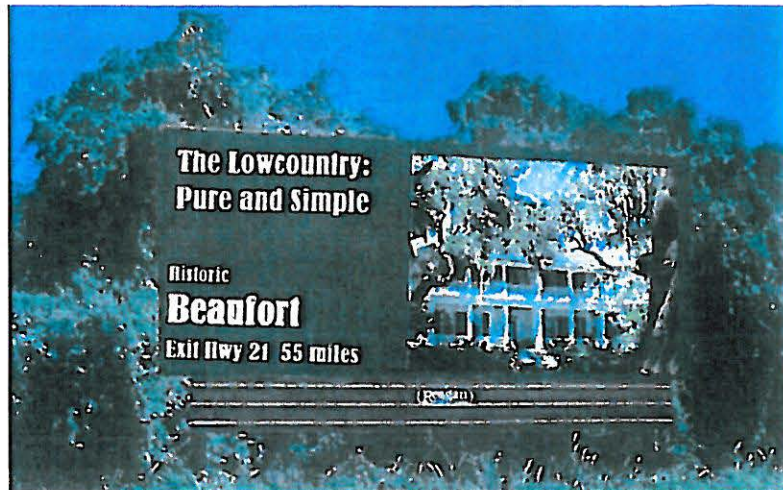


Shops in Montreal's "Old Town"

Thibinmontreal.wordpress.com

Distressed areas of towns and cities have one major selling point: many are located very close to or directly within the historic districts amid some extremely valuable real estate. The revitalization of these neglected zones improves the quality of life for residents and enriches each tourist's experience.

Catching the Overflow



Possible billboard for Highway 17, south of Charleston

Montage by Dennis Adams

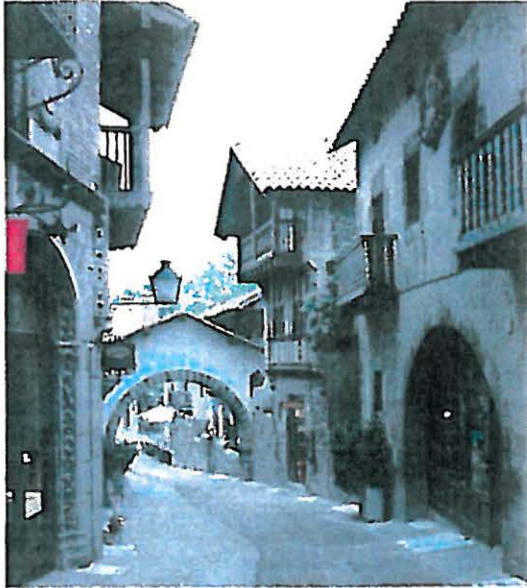
The approach to Thomas Jefferson's Virginia plantation today resembles the entrance to a theme park, with crowds, big parking lots, ticket gates and long queues in front of the "attractions." Ash Lawn-Highland, James Monroe's much less famous home, is just down the road. It provides a high-quality cultural and historic experience, usually for tourist fleeing the crowds at Monticello.

The Monticello-Ash Lawn situation illustrates that effective marketing and proximity to a major tourist destination can draw tourists who had not planned a visit to a lesser-known place. Beaufort County can do much to exploit its own fortuitous location between Savannah and Charleston, with access via U.S. Highway 17 and I-95, while leveraging the existing recognition that Hilton Head Island already enjoys.

Cultural Plazas

American tourists return daily from journeys abroad with fond memories – and many souvenirs – from the open markets of the outside world. Beaufort County lacks such an outlet to showcase the rich Gullah, Latino and other traditions of its residents. Visitors are less likely to patronize a chaotic cluster or scattered array of vendor stalls than an attractive and well-planned facility.

Before the current economic downturn, a local Latino restaurateur had been planning an "enterprise zone" along Highway 278 on northern Hilton Head Island, a commercial



Spanish Village, Barcelona

Perfecttravelblog.com

complex to boost the microenterprise of handicrafts of the many Hispanic nationalities represented in the Lowcountry as well as local artisans, artists and folk-crafters of all backgrounds.³ Combined with a farmer's market, the complex would have been a memorable marketplace – a heritage alternative to the "outlet malls," and a unique venue both local and cosmopolitan.

Millions of visitors pay premium admission fees each year to enter the Walt Disney World Epcot Center each year, as for the authentic cultural products and food of the nations represented as for the rides and exhibits. That is to say, they may spend as much or more on the merchandise than on the price of admission.

Barcelona, Spain has converted the Spanish Village of the 1929 World's Fair into a shopping attraction of the same name. Tourists buy ordinary souvenirs as well as better quality offerings in the shops and restaurants.

On a level much closer to the unaccomplished Hilton Head "Cultural Plaza" than Epcot or Barcelona, Beaufort could create an outstanding heritage attraction with little investment. Partnership with agencies serving the artisan populations could attract the home-based merchants who would profit from the venture.

Stay Constantly Updated

A paradox of historical sites is that fresh discoveries and new opportunities may occur at any moment. The Internet offers unprecedented ability for heritage tourism planners to stay constantly up-to-date on these unpredictable developments.

A case in point is the National Park Service's new addition to its listings of itineraries to historic sites and stories "Gullah / Geechee Cultural Heritage Corridor" web page (www.nps.gov/guge/index.htm; call 843-881-5516 For more information). The web

page is so recent in fact that it has only this very tentative message on its "Things to Do" page:

"The Gullah / Geechee Cultural Heritage Corridor is home to a wide variety of historic places, cultural sites, community festivals and heritage tours. A list of events and sites will be added to website shortly."

To inform the National Park Service of existing and future visitor-ready sites and related festival and tours is a task for which Beaufort County Government is uniquely qualified.



The NPS "Gullah/Geechee Cultural Heritage Corridor" web page

Sources:

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² Dawsey, Shawn. "St. Helena's Fort Fremont Awarded Historic Designation." *Beaufort Gazette*. June 3, 2010. Web. www.islandpacket.com/2010/06/03/1259976/st-helenas-fort-fremont-awarded.html. Accessed on September 21, 2011.

³ Personal recollection of Committee member Dennis Adams.

