



## County Council Meeting Beaufort County, SC

Council Chambers, Administration Building Beaufort County Government Robert Smalls  
Complex 100 Ribaut Road, Beaufort

**Monday, October 14, 2024  
5:00 PM**

### AGENDA

#### COUNCIL MEMBERS:

JOSEPH F. PASSIMENT, CHAIRMAN  
DAVID P. BARTHOLOMEW  
LOGAN CUNNINGHAM  
YORK GLOVER  
MARK LAWSON  
ANNA MARIA TABERNIK

LAWRENCE MCELYNN, VICE CHAIR  
PAULA BROWN  
GERALD DAWSON  
ALICE HOWARD  
THOMAS REITZ

1. CALL TO ORDER
2. PLEDGE OF ALLEGIANCE AND INVOCATION- Council Member Anna Maria Tabernik
3. PUBLIC NOTIFICATION OF THIS MEETING HAS BEEN PUBLISHED, POSTED, AND DISTRIBUTED IN COMPLIANCE WITH THE SOUTH CAROLINA FREEDOM OF INFORMATION ACT
4. APPROVAL OF AGENDA
5. ADMINISTRATOR'S REPORT

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#### CITIZEN COMMENTS

6. CITIZEN COMMENTS - (ANYONE who wishes to speak during the Citizen Comment portion of the meeting will limit their comments to no longer than three (3) minutes ( a total of 15 minutes ) and will address Council in a respectful manner appropriate to the decorum of the meeting, refraining from the use of profane, abusive, or obscene language)

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#### COMMITTEE REPORTS

7. LIASION AND COMMITTEE REPORTS

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#### PUBLIC HEARINGS AND ACTION ITEMS

8. APPROVAL OF CONSENT AGENDA

- [9.](#) FIRST READING OF AN ORDINANCE TO PROVIDE FOR THE ISSUANCE AND SALE OF NOT EXCEEDING SEVENTY MILLION DOLLARS (\$70,000,000) GENERAL OBLIGATION BONDS OF 2025 OF BEAUFORT COUNTY, SOUTH CAROLINA; TO PRESCRIBE THE PURPOSES FOR WHICH THE PROCEEDS SHALL BE EXPENDED; TO PROVIDE FOR THE PAYMENT THEREOF; AND OTHER MATTERS RELATING THERETO (***FISCAL IMPACT: Once approved by Council, the County will authorize the issuance of GO Bonds not to exceed \$70 million dollars and pay for the debt from the existing Debt Service milage and debt service fund balance as described in the 2025 General Obligation Bond Ordinance***)
- [10.](#) PUBLIC HEARING AND SECOND READING OF AN ORDINANCE AMENDING THE COMMUNITY DEVELOPMENT CODE (CDC): SECTION 3.1.60 (CONSOLIDATED USE TABLE), 3.3.40 (COMMUNITY CENTER MIXED USE (C4) ZONE STANDARDS), AND 3.3.50 (REGIONAL CENTER MIXED USE (C5) ZONE STANDARDS) TO ALLOW DWELLING: SINGLE FAMILY DETACHED UNIT IN C4 NEIGHBORHOOD MIXED USE AND C5 REGIONAL CENTER MIXED USE
- Vote at First Reading on September 23, 2024 - 11:0*
- [11.](#) PUBLIC HEARING AND SECOND READING OF AN ORDINANCE FOR A TEXT AMENDMENT TO ARTICLE 1 (GENERAL PROVISIONS), DIVISION 1.3 (APPLICABILITY AND JURISDICTION), SECTION 1.3.50 (EXEMPTIONS) OF THE COMMUNITY DEVELOPMENT CODE (CDC) TO PROVIDE EXEMPTIONS TO ADDRESS COUNTY PUBLIC SERVICES USES
- Vote at First Reading on September 23, 2024 - 11:0*
- [12.](#) PUBLIC HEARING AND SECOND READING OF AN ORDINANCE FOR A COMPREHENSIVE PLAN AMENDMENT TO ADD THE BEAUFORT COUNTY HOUSING IMPACT ANALYSIS AS AN APPENDIX TO THE 2040 COMPREHENSIVE PLAN
- Vote at First Reading on September 23, 2024 - 11:0*
- [13.](#) PUBLIC HEARING AND SECOND READING OF AN ORDINANCE AMENDING BEAUFORT COUNTY CODE OF ORDINANCES PART 1 GENERAL ORDINANCES, CHAPTER 46 HEALTH AND SANITATION, ARTICLE IV ALCOHOL AND DRUG ABUSE BOARD SECTIONS 121 PURPOSE AND 122 POWERS AND DUTIES; AND REPEALING SECTION 46-122 MEMBERSHIP
- Vote at First Reading on September 23, 2024 - 11:0*
- [14.](#) PUBLIC HEARING AND SECOND READING OF AN ORDINANCE AUTHORIZING THE COUNTY ADMINISTRATOR TO ENTER INTO A LEASE AGREEMENT WITH LOWCOUNTRY REGIONAL TRANSPORTATION AUTHORITY FOR THE COUNTY OWNED REAL PROPERTY LOCATED AT 316 CASTLE ROCK ROAD
- Vote at First Reading on September 23, 2024 - 11:0*

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## CITIZEN COMMENTS

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### 15. CITIZEN COMMENT PERIOD- 15 MINUTES TOTAL

***Anyone who wishes to speak during the Citizen Comment portion of the meeting will limit their comments and speak no longer than three (3) minutes. Speakers will address Council in a respectful manner appropriate to the decorum of the meeting, refraining from the use of profane, abusive, or obscene language. In accordance with Beaufort County's Rules and Procedures, giving of a speaker's time to another is not allowed.***

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## EXECUTIVE SESSION

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16. PURSUANT TO S.C. CODE SECTION 30-04-70(A)(2) TO RECEIVE LEGAL ADVICE REGARDING CONTRACTUAL ARRANGEMENTS (PEPPER HALL/OKATIE PARK)
17. PURSUANT TO S. C. CODE SECTION 30-4-70(A)(2) TO ENGAGE IN DISCUSSIONS AND NEGOTIATIONS INCIDENT TO PROPOSED CONTRACTUAL ARRANGEMENTS (St. JAMES BAPTIST CHURCH)
18. PURSUANT TO S. C. CODE SECTION 30-4-70(A)(1) TO DISCUSS THE APPOINTMENT OF A PERSON REGULATED BY A PUBLIC BODY OR THE APPOINTMENT OF A PERSON TO A PUBLIC BODY. (BJWSA APPOINTMENT)

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**END OF EXECUTIVE SESSION**

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19. MATTERS ARISING OUT OF EXECUTIVE SESSION
20. ADJOURNMENT

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## CONSENT AGENDA

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### Items Originating from the Finance Committee

1. APPROVAL FOR THE DEMOLITION OF THE AGNES MAJOR COMMUNITY CENTER TO BE PERFORMED BY PUBLIC WORKS
2. APPROVAL OF A RESOLUTION TO ACCEPT AN SC AERONAUTICS COMMISSION OFFICE GRANT FOR \$750,000 FOR HXD TERMINAL IMPROVEMENT PROJECT
3. APPROVAL OF A RESOLUTION AUTHORIZING THE COUNTY ADMINISTRATOR TO ADOPT AND IMPLEMENT THE LOCAL ACCOMMODATIONS TAX AND LOCAL HOSPITALITY TAX GRANT FUNDING POLICY
4. APPROVAL OF A RESOLUTION AUTHORIZING THE COUNTY ADMINISTRATOR TO ENTER INTO A FACILITY USE AGREEMENT WITH THE BEAUFORT COUNTY SCHOOL DISTRICT
5. APPROVAL OF A RESOLUTION ADOPTING THE BEAUFORT COUNTY SOCIAL MEDIA POLICY
6. THIRD READING OF AN ORDINANCE ACCEPTING THE TRANSFER OF AUTHORITY FOR CONDUCTING MUNICIPAL ELECTIONS FROM THE TOWN OF PORT ROYAL TO THE BEAUFORT COUNTY BOARD OF VOTER REGISTRATION AND ELECTIONS

*Vote at First Reading on September 9, 2024 - 11:0*

*Vote at Public Hearing and Second Reading on September 23, 2024 - 11:0*

7. BOARDS AND COMMISSIONS APPOINTMENTS & REAPPOINTMENTS

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## END OF CONSENT AGENDA

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**TO WATCH COMMITTEE OR COUNTY COUNCIL MEETINGS OR FOR A COMPLETE LIST OF AGENDAS AND BACKUP PACKAGES, PLEASE VISIT:**

<https://beaufortcountysc.gov/council/council-committee-meetings/index.html>

COUNTY COUNCIL  
CITIZENS COMMENTS 2<sup>nd</sup> PORTION

Any Topic

DATE: 10/14/24

PRINT FULL NAME: WILLIAM ANDREWS

TOPIC: STREET SIGNAGE

COUNTY COUNCIL  
CITIZENS COMMENTS 2<sup>nd</sup> PORTION

Any Topic

DATE: 10/14/24

PRINT FULL NAME: Carrie B. Major

TOPIC: Youth & Community Center - St. Helena Island



# BEAUFORT COUNTY COUNCIL

## AGENDA ITEM SUMMARY

Item 9.

### ITEM TITLE:

**AN ORDINANCE TO PROVIDE FOR THE ISSUANCE AND SALE OF NOT EXCEEDING SEVENTY MILLION DOLLARS (\$70,000,000) GENERAL OBLIGATION BONDS OF 2025 OF BEAUFORT COUNTY, SOUTH CAROLINA; TO PRESCRIBE THE PURPOSES FOR WHICH THE PROCEEDS SHALL BE EXPENDED; TO PROVIDE FOR THE PAYMENT THEREOF; AND OTHER MATTERS RELATING THERETO.**

### MEETING NAME AND DATE:

Finance, Administration, and Economic Development Meeting, September 23, 2024

### PRESENTER INFORMATION:

John Robinson, Assistant County Administrator – Public Safety

David Cheatwood -First Tryon Financial Analyst – remote

Jeremy Cook – HSB – Bond Council -remote

30 minutes

### ITEM BACKGROUND:

February 6, 2024, discussed at Strategic Planning workshop.

May 28, 2023, County Council approved a resolution committing funds for the construction of a regional workforce training center.

May 1, 2024, David Cheatwood, First Tryon Financial Advisor, presented to the Finance, Administration, and Economic Development Committee regarding bonding options.

### PROJECT / ITEM NARRATIVE:

FY 25 General Obligation Bond issuance. On February 6, 2024, during the Strategic Planning workshop, County Council discussed capital needs of County owned infrastructure as well as their desire to support higher education, workforce and affordable housing, as well as community health care needs. Each of these areas were discussed and the potential funding source of a General Obligation bond. Through the budget process, staff developed the FY 2025 Capital Improvement Plan to identify the counties capital needs. County Staff worked with Beaufort Memorial Hospital (“BMH”), and the Technical College of the Lowcountry (“TCL”) to determine their requests. TCL came before Finance Committee on March 18, 2024, and May 1, 2024, where Committee voted to recommend to Council to adopt a resolution supporting this request. County Council approved a resolution to commit funds from Beaufort County to the Technical College of the Lowcountry for the construction of the Arthur E. Brown Regional Workforce Training Center on May 28, 2023. Finance Staff and County Legal met with our Financial Advisor and Bond Council to discuss bonding options. David Cheatwood, First Tryon Financial Advisor, presented to the Finance, Administration, and Economic Development Committee on May 1, 2024. The presentation included the County’s financial position, bonding capacity, plan of finance for the BMH and TCL projects, as well as Beaufort County Capital Projects. The intent was for this bond to come forward simultaneously with the FY 25 budget ordinance. Bond issuance was delayed out of concern for other pending projects and planned to come back to Finance Committee in September of 2024. The original bond issuance was planned for \$90.1 million dollars. Staff has worked to reduce the amount to \$70 million dollars.

The back-up material includes the GO Bond financing report from First Tryon Advisors and the Bond Ordinance prepared by Beaufort County Bond Council Jeremy Cook from HSB.

**FISCAL IMPACT:**

Once approved by Council, the County will authorize the issuance of GO Bonds not to exceed \$70 million dollars and pay for the debt from the existing Debt Service milage and debt service fund balance as described in the 2025 General Obligation Bond Ordinance

**STAFF RECOMMENDATIONS TO COUNCIL:**

Staff recommends approval of the ordinance

**OPTIONS FOR COUNCIL MOTION:**

Motion to approve/deny/amend the proposed ordinance is issue General Obligation Bonds 2025.  
If approved, the proposed ordinance will move to Council for approval.

AN ORDINANCE  
TO PROVIDE FOR THE ISSUANCE AND SALE OF NOT EXCEEDING SEVENTY MILLION  
DOLLARS (\$70,000,000) GENERAL OBLIGATION BONDS OF 2025 OF BEAUFORT COUNTY,  
SOUTH CAROLINA; TO PRESCRIBE THE PURPOSES FOR WHICH THE PROCEEDS SHALL BE  
EXPENDED; TO PROVIDE FOR THE PAYMENT THEREOF; AND OTHER MATTERS RELATING  
THERE TO.

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EXHIBIT A – FORM OF BOND

EXHIBIT B – FORM OF CONTINUING DISCLOSURE AGREEMENT

BE IT ORDAINED BY THE COUNTY COUNCIL OF BEAUFORT COUNTY, SOUTH CAROLINA IN MEETING DULY ASSEMBLED:

## ARTICLE I

### FINDINGS OF FACT

As an incident to the enactment of this Ordinance and the issuance of the bonds provided for herein, the County Council of Beaufort County (the “**Council**”), the governing body of Beaufort County, South Carolina (the “**County**”), finds that the facts set forth in this **Article I** exist, and the statements made with respect thereto are true and correct.

#### Section 1.01 Objectives

(a) By virtue of Title 4, Chapter 15, as supplemented by Section 11-27-40, Code of Laws of South Carolina, 1976, as amended (the “**South Carolina Code**”), the County is empowered to issue general obligation bonds for any “authorized purpose” as therein defined. The above-referenced title, chapter and section of the South Carolina Code are hereinafter collectively referred to as the “**Enabling Act.**”

(b) After due investigation, the Council has determined that it is in the best interest of the County to provide for the issuance and sale of general obligation bonds in the principal amount of not exceeding \$70,000,000 (1) to defray the costs of constructing and acquiring public works capital projects, public safety capital projects, parks and recreation capital projects, community centers, passive parks capital projects, hospital capital projects including affordable housing projects, a workforce training facility, and other capital projects as determined by the County (collectively, the “**Project**”) and (2) to pay related costs of issuance, which purposes will serve a public and corporate purpose of the County and benefit the general welfare of the County.

#### Section 1.02 Recital of Applicable Constitutional Provisions

Section 14 of Article X of the Constitution of the State of South Carolina, 1895, as amended (the “**Constitution**”) provides that the counties of the State of South Carolina (the “**State**”) may issue bonded indebtedness in an amount not exceeding eight percent of the assessed value of all taxable property therein. Paragraph (6) of Section 14 of Article X of the Constitution further provides that general obligation debt authorized by a majority of the qualified electors of the issuer may be issued without consideration of the eight percent limit otherwise imposed by Section 14 of Article X. The Council is informed that the assessed value of all taxable property located within the County as of June 30, 2024, which is the last completed assessment thereof, is not less than the sum of \$2,654,721,069, exclusive of new industrial property exempt from taxation pursuant to Section 3(g) of Article X of the Constitution. Thus, the eight percent debt limit of the County is not less than \$212,377,686. At present, \$57,352,954 in general obligation debt is chargeable against this limit. Thus, with respect to the proposed bonds of the County referred to in Section 1.01(b) hereof, the Council may cause to be issued general obligation bonds in the aggregate principal amount of not exceeding \$70,000,000 based on such assessed value for the purpose of paying the costs of the Project and issuance costs, without the authorization required by Section 14(6) of Article X of the Constitution.

#### Section 1.03 Holding of Public Hearing and Notice Thereof

Pursuant to the provisions of Section 4-9-130 of the South Carolina Code, a public hearing, after giving reasonable notice, is required to be conducted prior to the third and final reading of this Ordinance

by the Council. In accordance with this provision, a public hearing was conducted and due notice and provided all as required by said Section 4-9-130.

#### Section 1.04 Notice of Adoption of Ordinance

Section 4-9-1220 of the South Carolina Code provides that within 60 days following the enactment by the Council of an ordinance authorizing the issuance of general obligation debt, a petition signed by not less than fifteen percent of the qualified electors of the County may be filed with the Clerk to Council requesting that such ordinance be repealed.

## ARTICLE II DEFINITIONS AND CONSTRUCTION

### Section 2.01 Definitions

As used in this Ordinance unless the context otherwise requires, the following terms shall have the following respective meanings:

***“Authorized Investments”*** means any investments that are at the time legal for investment of the County’s funds under the laws of the State and of the United States.

***“Authorized Officer”*** means the Chairman or the Vice-Chairman of the Council, the County Administrator and any other officer or employee of the County designated from time to time as an Authorized Officer by a certificate signed on behalf of the County by the Chairman or the County Administrator, and when used with reference to any act or document also means any other person designated by a certificate signed on behalf of the County by the Chairman or the County Administrator to perform such act or sign such document.

***“Beneficial Owner”*** means, whenever used with respect to a Bond, the person in whose name such Bond is recorded as the beneficial owner of such Bond by a Participant on the records of such Participant or such person’s subrogee.

***“Bond”*** or ***“Bonds”*** means any of the Bonds of the County authorized by this Ordinance.

***“Bondholder”*** or ***“Holder”*** or ***“Holders of Bonds”*** or ***“Owner”*** or ***“Registered Owner”*** similar term means, when used with respect to a Bond or Bonds, any person who shall be registered as the owner of any Bond Outstanding; provided, that in the event the Bonds are issued in separate series pursuant to **Section 3.21** hereof, such terms shall refer only to the registered owners of the respective series of Bonds.

***“Bond Payment Date”*** means each March 1 and September 1, or such other dates as may be determined by the Chairman or the County Administrator, on which interest on any of the Bonds shall be payable or on which both a Principal Installment and interest shall be payable on any of the Bonds.

***“Chairman”*** means the Chairman of County Council or, in the absence or unavailability of the Chairman of County Council for any reason, the Vice Chairman of County Council.

***“Clerk to Council”*** means the Clerk to Council or the Assistant Clerk to Council, Interim Clerk to Council or Acting Clerk to Council, as the case may be.

***“Code”*** means the Internal Revenue Code of 1986, as amended, and the Treasury Regulations applicable thereto.

**“Continuing Disclosure Agreement”** shall mean that certain Continuing Disclosure Agreement in the form attached hereto as Exhibit B as prescribed by United States Securities and Exchange Commission Rule 15c2-12 authorized pursuant to **Section 11.07(b)** hereof, as originally executed and as the same may be amended from time to time in accordance with the terms thereof.

**“Corporate Trust Office”**, when used with respect to any Paying Agent or Registrar, means the office at which its corporate trust business with respect to the Bonds shall be administered.

**“Council”** means the County Council of Beaufort County, South Carolina, the governing body of the County or any successor governing body of the County.

**“County”** means Beaufort County, South Carolina.

**“County Administrator”** means the Administrator of the County or, in the absence or unavailability of the County Administrator for any reason, the acting or interim County Administrator.

**“DTC”** means The Depository Trust Company, a limited purpose trust company organized under the laws of the State of New York, and its successors and assigns.

**“Enabling Act”** means Title 4, Chapter 15, as amended, of the South Carolina Code as supplemented by Section 11-27-40 of the South Carolina Code.

**“Fiduciary”** means any financial institution appointed to serve as the Paying Agent and/or the Registrar and their successors and assigns.

**“Financial Advisor”** means an independent financial advisory firm engaged to advise the County in connection with the Bonds.

**“Governmental Unit”** means a state or local governmental unit within the meaning of Section 141(b) of the Code.

**“Government Obligations”** means and includes direct general obligations of the United States of America or agencies thereof or obligations, the payment of principal or interest on which is fully and unconditionally guaranteed by the United States of America.

**“Nominee”** means the nominee of the Securities Depository which shall be the Holder of Bonds while held under a book-entry only system and any successor appointed by the Securities Depository. The initial Nominee shall be Cede & Co.

**“Nongovernmental Person”** means any Person other than a Governmental Unit.

**“Ordinance”** means this Ordinance as the same may be amended or supplemented from time to time in accordance with the terms hereof.

**“Outstanding”**, when used in this Ordinance with respect to Bonds means, as of any date, all Bonds theretofore authenticated and delivered pursuant to this Ordinance except:

- (a) any Bond cancelled or delivered to the Registrar for cancellation on or before such date;

(b) any Bond (or any portion thereof) deemed to have been paid in accordance with the provisions of **Section 7.01** hereof; and

(c) any Bond in lieu of or in exchange for which another Bond shall have been authenticated and delivered pursuant to **Section 3.11** of this Ordinance.

**“Participant”** or **“Participants”** means any broker-dealers, banks and other financial institutions for which the Securities Depository holds Bonds as securities depository.

**“Paying Agent”** means the County or any bank, trust company or national banking association which is authorized to pay the Principal Installment of or interest on any Bonds and having the duties, responsibilities and rights provided for in this Ordinance, and its successor or successors and any other corporation or association which at any time may be substituted in its place pursuant to this Ordinance. The institution named as Paying Agent may also act as Registrar.

**“Person”** means an individual, a partnership, a corporation, a trust, a trustee, an unincorporated organization, or a government or an agency or political subdivision thereof.

**“Principal Installment”** means, as of any date of calculation, the principal amount of all Bonds due on a specified date.

**“Record Date”** means the 15<sup>th</sup> day of the month immediately preceding each Bond Payment Date.

**“Registrar”** means the County or any bank, trust company, or national banking association which is authorized to maintain an accurate list of those who from time to time shall be the Holders of the Bonds and shall effect the exchange and transfer of Bonds in accordance with the provisions of this Ordinance and having the duties, responsibilities, and rights provided for in this Ordinance and its successor or successors and any other corporation or association which at any time may be substituted in its place pursuant to this Ordinance. The institution named as Registrar may also act as Paying Agent.

**“Representation Letter”** means the Blanket Letter of Representations from the County to DTC, which shall be deemed to be a part of this Ordinance and shall be the binding obligation of the County.

**“Securities Depository”** means the administrator of the book-entry only system for the Bonds, as further described in **Section 3.20** hereof and any successor appointed as provided in **Section 3.20(c)** hereof. The initial Securities Depository shall be DTC.

**“South Carolina Code”** means the Code of Laws of South Carolina, 1976, as amended.

**“State”** means the State of South Carolina.

**“Term Bonds”** has the meaning provided in **Section 3.02** hereof.

## Section 2.02 Construction

In this Ordinance, unless the context otherwise requires:

(a) Articles and Sections referred to by number shall mean the corresponding Articles and Sections of this Ordinance.

(b) The terms “hereby”, “hereof”, “hereto”, “herein”, “hereunder” and any similar terms refer to this Ordinance, and the term “hereafter” shall mean after, and the term “heretofore” shall mean before, the date of enactment of this Ordinance.

(c) Words of the masculine gender shall mean and include correlative words of the female and neuter genders, and words importing the singular number shall mean and include the plural number and vice versa.

(d) Any Fiduciary shall be deemed to hold an Authorized Investment in which money is invested pursuant to the provisions of this Ordinance, even though such Authorized Investment is evidenced only by a book entry or similar record of investment.

### ARTICLE III

#### ISSUANCE OF BONDS

##### Section 3.01 Ordering the Issuance of Bonds

Pursuant to the provisions of the Enabling Act, and for the purpose of obtaining funds to defray the costs of the Project described in **Section 1.01** hereof, there shall be issued not exceeding \$70,000,000 aggregate principal amount of General Obligation Bonds of the County. Such Bonds shall be designated “General Obligation Bonds of 2025 of Beaufort County, South Carolina” or such other designation determined by the Chairman or the County Administrator. Such Bonds may be issued in one or more series.

##### Section 3.02 Maturity Schedule of Bonds

(a) Unless determined otherwise by the Chairman or the County Administrator, interest on the Bonds shall be payable on March 1, 2025 and semiannually thereafter on March 1 and September 1 of each year until payment of the principal thereof. The County’s fiscal year 2025 budget is hereby amended to provide for the payment of the March 1, 2025 debt service on the Bonds. Such debt service payment shall be made from any legally available source of the County, including but not limited to the original issue premium received from the County from the sale of the Bonds and the fund balance of County’s debt service fund. Unless determined otherwise by the Chairman or the County Administrator and subject to the requirements of the Enabling Act, the Bonds shall mature on March 1 of such years, ending not later than March 1, 2054, and in such amounts, as shall be determined by the Chairman or the County Administrator upon advice from the Financial Advisor. In this regard, the Chairman or the County Administrator, in his or her discretion, may determine that certain maturities of the Bonds will be subject to mandatory sinking fund redemption prior to their stated maturity date (such Bonds, the “**Term Bonds**”). In such event, the Chairman or the County Administrator shall also determine the respective principal amounts of such mandatory sinking fund redemptions and the years in which such redemptions shall occur.

(b) In the absence of a determination by the Chairman or the County Administrator that certain Bonds should be made subject to mandatory sinking fund redemption, the purchaser of the Bonds, as determined pursuant to **Sections 3.15** and **5.02** herein, may elect to combine one or more consecutive maturities to create one or more term maturities, each of which will be subject to annual mandatory sinking fund redemption at par plus accrued interest to the redemption date (to the extent not previously redeemed) in the principal amounts and for the years shown in the maturity schedule established by the Chairman or the County Administrator pursuant to this **Section 3.02**. To the extent Bonds subject to mandatory sinking fund redemption in a given year have been purchased by the County pursuant to the provisions set forth in **Article IV** herein, the amount of mandatory sinking fund redemption in such year shall be reduced in such manner as the County shall direct, or, absent such direction, on a pro-rata basis.



### Section 3.03 Provision for Payment of Interest on the Bonds

The original issue date of the Bonds shall be the date of delivery of the Bonds, or such other date as may be selected by the Chairman or the County Administrator. The Bonds shall be authenticated on such dates as they shall, in each case, be delivered. Each Bond shall bear interest from the original issue date if no interest has yet been paid; otherwise from the last date to which interest has been paid and which date is on or prior to the date of such Bond's authentication. The interest payment on a Bond shall be made in accordance with **Section 3.04(c)** hereof to the Person in whose name such Bond is registered in accordance with **Section 3.08** hereof at the close of business on the Record Date with respect to such payment.

### Section 3.04 Medium of Payment; Form and Denomination of Bonds, Place of Payment of Principal

(a) The Bonds shall be payable as to Principal Installment and interest at the rates per annum determined in the manner prescribed by **Section 3.15** hereof (on the basis of a 360-day year of twelve 30-day months) in any coin or currency of the United States of America which at the time of payment is legal tender for the payment of public and private debts.

(b) The Bonds shall be issued in the form of fully registered, book-entry Bonds. The Bonds shall be issued in the denomination of \$5,000 or any whole multiple thereof, not exceeding the principal amount of the Bonds maturing in such year. The Bonds shall be identified in such fashion as to maintain a proper record thereof.

(c) The Principal Installment of all Bonds shall be payable at the Corporate Trust Office of the Paying Agent; and payment of the interest on each Bond shall be made by the Paying Agent to the Person appearing on the applicable Record Date on the registration books of the County, which books shall be held by the Registrar as provided in **Section 3.08** hereof, as the registered owner thereof, by check or draft mailed to such registered owner at his address as it appears on such registration books in sufficient time to reach such registered owner on the Bond Payment Date. Payment of the Principal Installment of all Bonds shall be made (i) upon the presentation and surrender for cancellation of such Bonds as the same shall become due and payable or (ii) pursuant to the provisions of **Section 3.11** hereof in the event of destruction, loss or theft of any such Bond.

### Section 3.05 Agreement to Maintain Registrar and Paying Agent

As long as any of the Bonds remain Outstanding there shall be a Registrar and a Paying Agent, each of which shall be either the County or a financial institution maintaining Corporate Trust Offices where (i) the Bonds may be presented for registration of transfers and exchanges, (ii) notices and demands to or upon the County in respect of the Bonds may be served, and (iii) the Bonds may be presented for payment, exchange and transfer. In the event the Bonds are sold in separate series pursuant to **Section 3.21** hereof and the County elects not to be the Registrar and Paying Agent, a separate Registrar and Paying Agent shall be maintained for each series (which separate Paying Agent and Registrar may be the same financial institution as shall serve in such capacities with respect to any of the other series of the Bonds).

### Section 3.06 Execution and Authentication

(a) The Bonds shall be executed in the name and on behalf of the County by an Authorized Officer, with its corporate seal impressed, imprinted or otherwise reproduced thereon, and attested by the Clerk to Council or other Authorized Officer (other than the officer executing such Bonds). Bonds bearing the manual or facsimile signature of any Person who shall have been such an Authorized Officer at the time

such Bonds were so executed shall bind the County notwithstanding the fact that he or she may have ceased to be such Authorized Officer prior to the authentication and delivery of such Bonds or was not such Authorized Officer at the date of the authentication and delivery of the Bonds.

(b) No Bond shall be valid or obligatory for any purpose or shall be entitled to any right or benefit hereunder unless there shall be endorsed on such Bond a certificate of authentication in the form set forth in this Ordinance, duly executed by the Registrar; and such certificate of authentication upon any Bond executed on behalf of the County shall be conclusive evidence that the Bond so authenticated has been duly issued hereunder and that the Holder thereof is entitled to the benefit of the terms and provisions of this Ordinance.

#### Section 3.07 Exchange of Bonds

Bonds, upon surrender thereof at the office of the Registrar with a written instrument of transfer satisfactory to the Registrar, duly executed by the registered Holder or his duly authorized attorney, may, at the option of the registered Holder thereof, be exchanged for an equal aggregate principal amount of Bonds in authorized denominations of the same interest rate and maturity. So long as any of the Bonds remain Outstanding, the County shall make all necessary provisions to permit the exchange of Bonds at the Corporate Trust Office of the Registrar.

#### Section 3.08 Transferability and Registry

All Bonds shall at all times, when the same are Outstanding, be payable, both as to Principal Installment and interest to a Person, and shall be transferable, only in accordance with the provisions for registration and transfer contained in this Ordinance and in the Bonds. So long as any of the Bonds remain Outstanding, the County shall maintain and keep, at the Corporate Trust Office of the Registrar, books for the registration and transfer of Bonds, and, upon presentation thereof for such purpose at the Corporate Trust Office of the Registrar, the County shall register or cause to be registered therein, and permit to be transferred thereon, under such reasonable regulations as it or the Registrar may prescribe, any Bond, except that under no circumstances shall any Bond be registered or transferred to bearer. So long as any of the Bonds remain Outstanding, the County shall make all necessary provisions to permit the transfer of Bonds at the Corporate Trust Office of the Registrar.

#### Section 3.09 Transfer of Bonds

Each Bond shall be transferable only upon the books of the County, which shall be kept for such purpose at the Corporate Trust Office of the Registrar which shall be maintained for such purpose by the Registrar, upon presentation and surrender thereof by the Holder of such Bond in person or by his attorney duly authorized in writing, together with a written instrument of transfer satisfactory to the Registrar duly executed by the registered Holder or his duly authorized attorney. Upon surrender for transfer of any such Bond, the County shall execute and the Registrar shall authenticate and deliver, in the name of the Person who is the transferee, one or more new Bonds of the same aggregate principal amount and maturity and rate of interest as the surrendered Bond. All action taken by the Registrar pursuant to this **Section 3.09** shall be deemed to be the action of the County.

#### Section 3.10 Regulations with Respect to Exchanges and Transfers

All Bonds surrendered in any exchanges or transfers shall forthwith be cancelled by the Registrar. For each such exchange or transfer of Bonds, the County or the Registrar may make a charge sufficient to reimburse it or them for any tax, fee or other governmental charge required to be paid with respect to such exchange or transfer, which sum or sums shall be paid by the Holder requesting such exchange or transfer.

as a condition precedent to the exercise of the privilege of making such exchange or transfer. The County shall not be obligated to (i) issue, exchange or transfer any Bond after the Record Date with respect to any Bond Payment Date of the Bonds; (ii) issue, exchange or transfer any Bond during a period beginning at the opening of business 15 days next preceding any selection of Bonds to be redeemed and ending at the close of business on the date of the mailing of notice of such redemption; or (iii) transfer or exchange any Bonds called or being called for redemption in whole or in part.

#### Section 3.11 Mutilated, Destroyed, Lost and Stolen Bonds

(a) If any mutilated Bond is surrendered to the Registrar and the Registrar or the County receives evidence to their satisfaction of the destruction, loss or theft of any Bond, and there is delivered to the Registrar and the County such security or indemnity as may be required by them to save each of them harmless, then, in the absence of notice that such Bond has been acquired by a *bona fide* purchaser, the County shall execute, and upon the written request of an Authorized Officer of the County, the Registrar shall authenticate and deliver, in exchange for any such mutilated Bond or in lieu of any such destroyed, lost or stolen Bond, a new Bond of like tenor and principal amount, bearing a number unlike that of a Bond contemporaneously Outstanding. The Registrar shall thereupon cancel any such mutilated Bond so surrendered. In case any such mutilated, destroyed, lost or stolen Bond has become or is about to become due and payable, the County in its discretion may, instead of issuing a new Bond, pay such Bond.

(b) Upon the issuance of any new Bond under this **Section 3.11**, the County may require the payment of a sum sufficient to cover any tax, fee or other governmental charge that may be imposed in relation thereto and any other expenses, including counsel fees or other fees, of the County or of the Registrar connected therewith.

(c) Each new Bond issued pursuant to this **Section 3.11** in lieu of any destroyed, lost or stolen Bond, shall constitute an additional contractual obligation of the County, whether or not the destroyed, lost or stolen Bond shall at any time be enforceable by anyone, and shall be entitled to all the benefits hereof equally and proportionately with any and all other Bonds duly issued pursuant to this Ordinance. All Bonds shall be held and owned upon the express condition that the foregoing provisions are exclusive with respect to the replacement or payment of mutilated, destroyed, lost or stolen Bonds and shall preclude (to the extent lawful) all other rights or remedies with respect to the replacement or payment of mutilated, destroyed, lost or stolen Bonds or securities.

#### Section 3.12 Holder as Owner of Bond

Subject to the provisions of **Section 3.20** hereof, the County, the Registrar and any Paying Agent may treat the Holder of any Bond as the absolute owner thereof, whether such Bond shall be overdue or not, for the purpose of receiving payment of, or on account of, the Principal Installment of and interest on such Bond and for all other purposes, and payment of the Principal Installment and interest shall be made only to, or upon the order of, such Holder. All payments to such Holder shall be valid and effectual to satisfy and discharge the liability upon such Bond to the extent of the sum or sums so paid, and neither the County nor any Paying Agent shall be affected by any notice to the contrary.

#### Section 3.13 Cancellation of Bonds

The Registrar shall destroy all Bonds surrendered to it for cancellation and shall deliver a certificate to that effect to the County. No such Bonds shall be deemed Outstanding under this Ordinance and no Bonds shall be issued in lieu thereof.

#### Section 3.14 Payments Due on Saturdays, Sundays and Holidays

In any case where the Bond Payment Date shall be a Saturday or Sunday or shall be, at the place designated for payment, a legal holiday or a day on which banking institutions are authorized by law to close, then payment of interest on or Principal Installment of the Bonds need not be made on such date but may be made on the next succeeding business day not a Saturday, Sunday or a legal holiday or a day upon which banking institutions are authorized by law to close, with the same force and effect as if made on the Bond Payment Date and no interest shall accrue for the period after such date.

#### Section 3.15 Conditions Relating to Naming of Interest Rates

The Bonds shall bear such rate or rates of interest as shall at the sale of such Bonds reflect the lowest true interest cost to the County calculated in the manner hereinafter prescribed in this **Section 3.15** at a price of not less than par, but:

- (a) all bonds of the same maturity shall bear the same rate of interest;
- (b) no rate of interest named shall be more than 3% higher than the lowest rate of interest named;
- (c) each interest rate named shall be a multiple of 1/10<sup>th</sup> or 1/8<sup>th</sup> of one per centum (1%); and
- (d) any premium offered must be paid in cash as a part of the purchase price.

provided, however, that the Chairman or the County Administrator, upon the advice of the Financial Advisor, is hereby authorized to make any such adjustments to any of the above criteria except (d) as he shall determine at or prior to offering the Bonds for sale.

The true interest cost will be the nominal interest rate which, when compounded semiannually and used to discount all debt service payments on the bonds (computed at the interest rates specified in the bid and on the basis of a 360-day year of twelve 30-day months) to the dated date of the Bonds, results in an amount equal to the price bid for the Bonds. In the case of a tie bid, the winning bid will be awarded by lot. The right is reserved to waive irregularities in any bid. Bids will be accepted or rejected by 3:00 p.m. (local time) on the day of the sale.

#### Section 3.16 State Tax Exemption

Both the Principal Installments and interest on said Bonds shall be exempt from all State, county, municipal, school district, and all other taxes or assessments of the State, direct or indirect, general or special, whether imposed for the purpose of general revenue or otherwise, except inheritance, estate, transfer and certain franchise taxes.

#### Section 3.17 Order of Tax Levy to Pay Principal and Interest of Bonds

For the payment of the Principal Installments and interest on the Bonds as the same respectively mature and for the creation of such sinking fund as may be necessary therefor, the full faith, credit and taxing power of the County are hereby irrevocably pledged, and there shall be levied annually by the Auditor of the County, and collected by the Treasurer of the County, in the same manner as County taxes are levied and collected, a tax on all taxable property in the County, sufficient to pay the Principal Installment and interest on such Bonds as they respectively mature, and to create such sinking fund as may be necessary therefor.

### Section 3.18 Notice to Auditor and Treasurer to Levy Tax

The Auditor and Treasurer of the County shall be notified of this issue of Bonds and directed to levy and collect, respectively, upon all taxable property in the County an annual tax sufficient to meet the payment of the Principal Installments and interest on said Bonds, as the same respectively mature, and to create such sinking fund as may be necessary therefor.

### Section 3.19 Form of Bonds

The form of the Bonds, and registration provisions to be endorsed thereon shall be substantially as set forth in Exhibit A attached hereto and made a part of this Ordinance.

### Section 3.20 Book-Entry

(a) Except as provided in **Section 3.20(c)**, the Bonds shall be held under a book-entry only system administered by the Securities Depository and shall be registered in the name of the Nominee. Payment of interest on any Bond registered in the name of the Nominee shall be made by New York Clearing House or equivalent next day funds to the account of the Nominee on the interest payment date for the Bonds at the address indicated for the Nominee on the registration books kept by the Registrar.

(b) The Bonds shall be initially issued in the form of separate, single, authenticated fully-registered Bonds in the amount of each separately stated maturity of Bonds of a series. Upon initial issuance, the ownership of each such Bond shall be registered on the registration books kept by the Registrar in the name of the Nominee. The County may treat the Securities Depository (or the Nominee) as the sole and exclusive owner of the Bonds registered in the name of the Nominee for the purposes of (A) paying the principal of or interest on the Bonds, (B) selecting the Bonds or portions thereof to be redeemed, (C) giving any notice permitted or required to be given to Holders of Bonds under the Ordinance, (D) registering the transfer of Bonds, and (E) requesting any consent or other action to be taken by the Holders of the Bonds and for all other purposes whatsoever; and neither the Registrar nor the County shall be affected by any notice to the contrary. Neither the Registrar nor the County shall have any responsibility or obligation to any Participant, any Beneficial Owner or any other person claiming a beneficial ownership interest in the Bonds under or through the Securities Depository or any Participant, or any other person which is not shown on the registration books of the Registrar as being a Holder of Bonds, with respect to (1) the accuracy of any records maintained by the Securities Depository or any Participant, (2) the payment to the Securities Depository, any Participant or any Beneficial Owner of any amounts in respect of the principal of or interest on the Bonds, (3) any notice which is permitted or required to be given to Holders of the Bonds under this Ordinance, or (4) any consent given or other action taken by the Securities Depository as such Holder. The County shall pay all principal of and interest on the Bonds only to the Securities Depository (or the Nominee), and all such payments shall discharge the County's obligations with respect to the principal of and interest on the Bonds to the extent of the sum or sums so paid. Except as provided in **Section 3.20(c)** below, no person other than the Securities Depository shall receive an authenticated Bond certificate. Upon delivery by the Securities Depository to the County of written notice to the effect that the Securities Depository has determined to substitute a new Nominee in place of Cede & Co., the Bonds shall be transferable to such new Nominee in accordance with the provisions of this Ordinance.

(c) In the event the County determines, consistent with the operating rules of the Securities Depository, that it is in the best interest of the County not to continue the book-entry only system of transfer with respect to the Bonds, or that the interests of the Beneficial Owners might be adversely affected if the book-entry only system of transfer is continued with respect to the Bonds, then the County may notify the Securities Depository of such determination, whereupon the Securities Depository will notify the Participants of the availability through the Securities Depository of Bond certificates. In such event, the

Registrar shall issue, transfer and exchange Bond certificates as requested by the Securities Depository and any Participant or Beneficial Owner in appropriate amounts in accordance with this Ordinance. The Securities Depository may determine to discontinue providing its services with respect to the Bonds at any time by giving notice to the County and discharging its responsibilities with respect thereto under applicable law or the County may determine that the Securities Depository is incapable of discharging its duties as such and may so advise the Securities Depository. In either such event, the County shall either (A) establish its own book-entry only system, (B) locate another Securities Depository, or (C) deliver Bond certificates as provided herein and as requested by any Participant or Beneficial Owner, subject to the rules and procedures of the Securities Depository.

(d) Notwithstanding any other provision of this Ordinance to the contrary, so long as any Bond is registered in the name of Cede & Co., as nominee of DTC, all payment with respect to the principal of and interest on such Bond and all notices with respect to such Bond shall be made and given, respectively, to DTC as provided in the Representation Letter.

(e) In connection with any notice or other communications to be provided to the Holders of Bonds pursuant to this Ordinance by the County with respect to any consent or other action to be taken by the Holders of Bonds, the County shall establish a record date for such consent or other action and give DTC notice of such record date not less than 15 calendar days in advance of such record date to the extent possible. Such early notice to DTC shall be given when DTC is the Securities Depository.

#### Section 3.21 Separate Series of Bonds

At the discretion of the Chairman or the County Administrator, upon advice from the Financial Advisor, the Bonds authorized herein may be sold and issued in one or more series.

### ARTICLE IV

#### REDEMPTION OR PURCHASE OF BONDS

##### Section 4.01 Authorization of Redemption

(a) *Optional Redemption.* The Bonds are subject to optional redemption prior to their maturities at such time as the Chairman or the County Administrator, upon the advice of the Financial Advisor, shall determine.

(b) *Mandatory Redemption.* In the event the Chairman or the County Administrator, upon the advice of the Financial Advisor, shall determine that a portion of the Bonds shall be Term Bonds subject to mandatory sinking fund redemption prior to their stated maturity date:

(1) Such Term Bonds, to the extent not previously redeemed, shall be redeemed at a redemption price of 100% of the applicable principal amount, plus interest accrued to the redemption date, on the applicable March 1.

(2) The amount of any such mandatory sinking fund redemptions shall be reduced to the extent Term Bonds of the applicable maturity have been purchased by the County or redeemed by the County pursuant to **Section 4.01(a)** above, in such manner as the County shall direct, or, absent such direction, on a pro rata basis.

(3) At its option, to be exercised on or before the 45<sup>th</sup> day next preceding any date set for scheduled mandatory redemption with respect to the Term Bonds, the County may (i) deliver

to the Paying Agent for cancellation Term Bonds in any aggregate principal amount desired or (ii) receive a credit in respect of its scheduled mandatory redemption payment obligation for any Term Bonds which prior to said date have been redeemed (otherwise than through a scheduled mandatory redemption) and cancelled by the Paying Agent and not theretofore applied as a credit against any scheduled mandatory redemption payment obligation. Each Term Bond so delivered or previously redeemed shall be credited by the Paying Agent at 100% of the principal amount thereof against the obligation of the County on such scheduled mandatory redemption payment date; and the principal amount of such Term Bonds to be redeemed by operation of scheduled mandatory redemption shall be accordingly reduced.

(4) The County will on or before the 45<sup>th</sup> day next preceding each date set for scheduled mandatory redemption with respect to the Term Bonds, furnish to the Paying Agent a certificate indicating whether or not and to what extent the provisions of (i) and (ii) of the preceding paragraph are to be availed of with respect to such scheduled mandatory redemption and confirm that monies equal to the balance of such redemption payment will be paid on or before the next succeeding date set for scheduled mandatory redemption.

#### Section 4.02 Purchases of Bonds Outstanding

Purchases of Bonds Outstanding may also be made by the County at any time with money available to it from any source. Upon any such purchase the County shall deliver such Bonds to the Registrar for cancellation.

### ARTICLE V

#### SALE OF BONDS; APPROVAL OF OFFICIAL STATEMENT

##### Section 5.01 Determination of Time to Receive Bids – Form of Notice of Sale

The Bonds shall be sold at public sale, at a price of not less than par. Bids shall be received not later than the date and time to be selected by the Chairman or the County Administrator. The Bonds shall be advertised for sale as and if required by the Enabling Act and State law, which notice shall appear at least once, not less than seven days before the date set for sale.

##### Section 5.02 Award of Bonds

Upon the receipt of bids for the purchase of the Bonds, unless all bids are rejected, the Chairman or the County Administrator shall award the Bonds to the bidder offering to purchase them at the lowest true interest cost to the County, as determined pursuant to **Section 3.15** hereof. The Chairman or the County Administrator is further authorized to name the Registrar and the Paying Agent for the Bonds, in accordance with **Section 3.05** hereof. In the event no bids are received or if all bids are reject, the County reserves its right, at the option of the Chairman or the County Administrator, upon the advice of the Financial Advisor, to pursue a private sale of the Bonds pursuant to Section 11-27-40 of the South Carolina Code.

##### Section 5.03 Approval of Official Statement

The Council hereby authorizes the preparation and distribution of a Preliminary Official Statement of the County in connection with the sale of the Bonds, in such form as the Chairman or the County Administrator approves, with any modification as the Chairman or the County Administrator approves, and hereby authorizes the Chairman or the County Administrator to deem it final within the meaning of S.E.C. Rule 15(c)(2)-12. The Preliminary Official Statement may be distributed in electronic or printed format or



both. The Council further authorizes and approves the distribution and delivery of the final Official Statement in print and electronic format by the successful bidders in connection with the reoffering and sale of the Bonds by the successful bidders.

## ARTICLE VI

### DISPOSITION OF PROCEEDS OF SALE OF BONDS

#### Section 6.01 Disposition of Bond Proceeds Including Temporary Investments

The proceeds derived from the sale of the Bonds issued pursuant to this Ordinance shall be paid to the Treasurer of the County, to be deposited in a bond account fund for the County, and shall be expended and made use of by the County as follows:

(a) any premium shall be deposited in the sinking fund established hereunder and applied in accordance with the Enabling Act;

(b) the remaining proceeds shall be expended and made use of by the Council to defray the cost of issuing the Bonds and to defray costs of constructing and acquiring the Project or such other project as approved by supplemental ordinance pursuant to **Section 10.01** hereof. Pending the use of Bond proceeds, the same shall be invested and reinvested by the Treasurer of the County in Authorized Investments. Subject to the obligation of the County to rebate certain investment earnings to the United States Treasury in accordance with Section 148(f) of the Code, earnings from such investments shall be applied, at the direction of the Council, either (i) to defray the cost of the Project and if not required for this purpose, then (ii) to pay the first maturing installments of interest on the Bonds; and

(c) if any balance remains, it shall be held by the Treasurer of the County in a special fund and used to effect the retirement of the Bonds authorized by this Ordinance;

provided, that neither the purchasers nor any Holder of the Bonds shall be liable for the proper application of the proceeds thereof.

## ARTICLE VII

### DEFEASANCE OF BONDS

#### Section 7.01 Discharge of Ordinance – Where and How Bonds are Deemed to have been Paid and Defeased

If all of the said Bonds issued pursuant to this Ordinance and all interest thereon shall have been paid and discharged, then the obligations of the County under this Ordinance and all other rights granted hereby shall cease and determine. The Bonds shall be deemed to have been paid and discharged within the meaning of this **Article VII** under each of the following circumstances:

(a) The Paying Agent shall hold, at the stated maturities of the Bonds, in trust and irrevocably appropriated thereto, sufficient moneys for the payment of the Principal Installment and interest thereof; or

(b) If default in the payment of the principal of the Bonds or the interest thereon shall have occurred on any Bond Payment Date, and thereafter tender of such payment shall have been made, and at such time as the Paying Agent shall hold in trust and irrevocably appropriated thereto, sufficient moneys for the payment thereof to the date of the tender of such payment; or

(c) If the County shall elect to provide for the payment of the Bonds prior to their stated maturities and shall have deposited with the Paying Agent in an irrevocable trust moneys which shall be sufficient, or Government Obligations, the principal of and interest on which when due will provide moneys, which together with moneys, if any, deposited with the Paying Agent at the same time, shall be sufficient to pay when due the Principal Installment and interest, due and to become due on the Bonds on and prior to their maturity dates.

Neither the Government Obligations nor moneys deposited with the Paying Agent pursuant to this **Section 7.01** nor the principal or interest payments thereon shall be withdrawn or used for any purpose other than, and shall be held in trust for, the payment of the Principal Installment of, and interest on, said Bonds; provided that any cash received from such principal or interest payments on Government Obligations deposited with the Paying Agent, if not then needed for such purpose, shall to the extent practicable, be invested and reinvested in Government Obligations maturing at times and in amounts sufficient to pay when due the Principal Installment and interest to become due on said Bonds on the maturity date thereof and interest earned from such reinvestments not required for the payment of the Principal Installment and interest, may be paid over to the County, as received by the Paying Agent, free and clear of any trust, lien or pledge.

In the event any of the Bonds have been issued in separate series as provided in **Section 3.21** hereof, the provisions of this **Section 7.01** shall be deemed to apply to each such series separately.

## ARTICLE VIII

### CONCERNING THE FIDUCIARIES

#### Section 8.01 Fiduciary; Appointment and Acceptance of Duties

If the County elects not to be the Registrar and Paying Agent, then the financial institution or institutions chosen pursuant to **Section 3.05** hereof to act as Paying Agent and Registrar hereunder shall accept the duties and trusts imposed upon it by this Ordinance and shall agree in writing to perform such trusts but only upon the terms and conditions set forth in this **Article VIII**. Similarly, each financial institution appointed as a successor Registrar or as a successor Paying Agent shall signify its acceptance of the duties and trusts imposed by this Ordinance by a written acceptance.

#### Section 8.02 Responsibilities of Fiduciaries

The recitals of fact herein and in the Bonds shall be taken as the statements of the County and no Fiduciary assumes any responsibility for the correctness of the same except in respect of the authentication certificate of the Registrar endorsed on the Bonds. No Fiduciary makes any representations as to the validity or sufficiency of this Ordinance or of any Bonds or as to the security afforded by this Ordinance, and no Fiduciary shall incur any liability in respect thereof. No Fiduciary shall be under any responsibility or duty with respect to the application of any moneys paid to any other Fiduciary. No Fiduciary shall be under any obligation or duty to perform any act which would involve it in expense or liability or to institute or defend any suit in respect hereof or to advance any of its own moneys, unless indemnified to its reasonable satisfaction. No Fiduciary shall be liable in connection with the performance of its duties hereunder except for its own negligence or willful misconduct.

#### Section 8.03 Evidence on Which Fiduciaries May Act

(a) Each Fiduciary, upon receipt of any notice, ordinance, resolution, request, consent order, certificate, report, opinion, bond, or other paper or document furnished to it pursuant to any provision of

this Ordinance, shall examine such instrument to determine whether it conforms to the requirements of this Ordinance and shall be protected in acting upon any such instrument believed by it to be genuine and to have been signed or presented by the proper party or parties. Each Fiduciary may consult with counsel, who may or may not be counsel to the County, and the opinion of such counsel shall be full and complete authorization and protection in respect of any action taken or suffered by it under this Ordinance in good faith and in accordance therewith.

(b) Whenever any Fiduciary shall deem it necessary or desirable that a matter to be proved or established prior to taking or suffering any action under this Ordinance, such matter (unless other evidence in respect thereof be therein specifically prescribed) may be deemed to be conclusively proved and established by a certificate of an Authorized Officer, and such certificate shall be full warrant for any action taken or suffered in good faith under the provisions of this Ordinance upon the faith thereof; but in its discretion the Fiduciary may in lieu thereof accept other evidence of such fact or matter or may require such further or additional evidence as it may deem reasonable.

(c) Except as otherwise expressly provided in this Ordinance any request, order, notice or other direction required or permitted to be furnished pursuant to any provision thereof by the County to any Fiduciary shall be sufficiently executed if executed in the name of the County by an Authorized Officer.

#### Section 8.04 Compensation

The County shall pay to each Fiduciary from time to time reasonable compensation based on the then standard fee schedule of the Fiduciary for all services rendered under this Ordinance, and also all reasonable expenses, charges, counsel fees and other disbursements, including those of its attorneys, agents, and employees, incurred in and about the performance of their powers and duties under this Ordinance.

#### Section 8.05 Certain Permitted Acts

Any Fiduciary may become the owner or underwriter of any Bonds, notes or other obligations of the County or conduct any banking activities with respect to the County, with the same rights it would have if it were not a Fiduciary. To the extent permitted by law, any Fiduciary may act as depositary for, and permit any of its officers or directors to effect or aid in any reorganization growing out of the enforcement of the Bonds or this Ordinance.

#### Section 8.06 Resignation of Any Fiduciary

Any Fiduciary may at any time resign and be discharged of the duties and obligations created by this Ordinance by giving not less than 60 days written notice to the County and not less than 30 days written notice to the Holders of the Bonds as established by the books of registration prior to the next succeeding Bond Payment Date and such resignation shall take effect upon the date specified in such notice unless previously a successor shall have been appointed by the County pursuant to **Section 8.08** hereof in which event such resignation shall take effect immediately on the appointment of such successor. In no event, however, shall such a resignation take effect until a successor has been appointed.

#### Section 8.07 Removal of Fiduciary

So long as an event of default has not occurred, the County may remove the Fiduciary without cause. Any Fiduciary may be removed at any time by an instrument or concurrent instruments in writing, filed with the County and such Fiduciary, and signed by the Bondholders representing a majority in principal amount of the applicable series of Bonds then Outstanding or their attorneys in fact duly authorized, excluding any Bonds held by or for the account of the County.

#### Section 8.08 Appointment of Successor Fiduciaries

In case any Fiduciary hereunder shall resign or be removed, or be dissolved, or shall be in the course of dissolution or liquidation, or otherwise become incapable of acting hereunder, or in case it shall be taken under the control of any public officer or officers, or of a receiver appointed by a court, a successor shall be appointed by the County. Every such Fiduciary appointed pursuant to the provisions of this **Section 8.08** shall be a trust company or bank organized under the laws of the United States of America or any state thereof and which is in good standing, within or outside the State, having a stockholders' equity of not less than \$100,000,000 if there be such an institution willing, qualified and able to accept the trust upon reasonable and customary terms.

If in a proper case no appointment of a successor Fiduciary shall be made by the County pursuant to the foregoing provisions of this **Section 8.08** within 45 days after any Fiduciary shall have given to the County written notice as provided in **Section 8.06** hereof or after a vacancy in the office of such Fiduciary shall have occurred by reason of its removal or inability to act, the former Fiduciary or any Bondholder may apply to any court of competent jurisdiction to appoint a successor. Said court may thereupon, after such notice, if any, as such court may deem proper, appoint a successor.

#### Section 8.09 Transfer of Rights and Property to Successor

Any successor Fiduciary appointed under this Ordinance shall execute, acknowledge and deliver to its predecessor, and also to the County, an instrument accepting such appointment. Thereupon such successor, without any further act, deed or conveyance, shall become fully vested with all moneys, estates, properties, rights, powers, duties and obligations of such predecessor Fiduciary, with like effect as if originally named in such capacity. The Fiduciary ceasing to act shall nevertheless, however, on the written request of the County, or of the successor, execute, acknowledge and deliver such instruments of conveyance and further assurance and do such other things as may reasonably be required for more fully and certainly vesting and confirming in such successor all the right, title and interest of the predecessor Fiduciary in and to any property held by it under this Ordinance, and shall pay over, assign and deliver to the successor Fiduciary any money or other property subject to the trusts and conditions herein set forth. Should any deed, conveyance or instrument in writing from the County be required by such successor Fiduciary for more fully and certainly vesting in and confirming to such successor any such estates, rights, powers and duties, any and all such deeds, conveyances and instruments in writing shall, on request, and so far as may be authorized by law, be executed, acknowledged and delivered by the County. Any such successor Fiduciary shall promptly notify other Fiduciaries and depositaries, if any, of its appointment as Fiduciary.

#### Section 8.10 Merger or Consolidation

Any company into which any Fiduciary may be merged or converted or with which it may be consolidated, or any company resulting from any merger, conversion or consolidation to which any Fiduciary may be party, or any company to which any Fiduciary may sell or transfer all or substantially all of its corporate trust business, provided such company shall be a bank or trust company organized under the laws of any state of the United States or a national banking association, and shall be authorized by law to perform all the duties imposed upon it by this Ordinance, shall with the consent of the County be the successor to such Fiduciary without the execution or filing of any paper or the performance of any further act.

## Section 8.11 Adoption of Authentication

In case any of the Bonds contemplated to be issued under this Ordinance shall have been authenticated but not delivered, any successor Registrar may adopt the certificate of authentication of any predecessor Registrar so authenticating such Bonds and may deliver such Bonds so authenticated. In case any such Bonds shall not have been authenticated, any successor Registrar may authenticate such Bonds in the name of the predecessor Registrar or in the name of the successor Registrar, and in all such cases such certificate shall be of full force and effect.

## ARTICLE IX

### CERTAIN TAX CONSIDERATIONS

#### Section 9.01 General Tax Covenant

The County will comply with all requirements of the Code in order to preserve the tax-exempt status of the Bonds, including without limitation, the requirement to file the information report with the Internal Revenue Service. In this connection, the County covenants to execute any and all agreements or other documentation as it may be advised by bond counsel will enable it to comply with this **Section 9.01**, including its certification on reasonable grounds that the Bonds are not “arbitrage bonds” within the meaning of Section 148 of the Code.

#### Section 9.02 Tax Representations

The County hereby represents and covenants that it will not take any action which will, or fail to take any action which failure will, cause interest on the Bonds to become includable in the gross income of the Holder thereof for federal income tax purposes pursuant to the provisions of the Code and regulations promulgated thereunder. Without limiting the generality of the foregoing, the County represents and covenants that:

(a) All property provided by the net proceeds of the Bonds will be owned by the County in accordance with the rules governing the ownership of property for federal income tax purposes.

(b) The County shall not permit the proceeds of the Bonds or any facility financed with the proceeds of the Bonds to be used in any manner that would result in (a) 10% or more of such proceeds being considered as having been used directly or indirectly in any trade or business carried on by any Nongovernmental Person, (b) 5% or more of such proceeds being considered as having been used directly or indirectly in any trade or business of any Nongovernmental Person that is either “unrelated” or “disproportionate” to the governmental use of the financed facility by the County or by any other Governmental Unit (as the terms “unrelated” and “disproportionate” are defined for purposes of Section 141(b)(3) of the Code) or (c) 5% or more of such proceeds being considered as having been used directly or indirectly to make or finance loans to any Nongovernmental Person.

(c) The County is not a party to, nor will the County enter into, any contracts with any person for the use or management of any facility provided with the proceeds of the Bonds that do not conform to the guidelines set forth in Revenue Procedure 2017-13, as amended or supplemented.

(d) The County will not sell or lease any property provided by the Bonds to any person unless it obtains the opinion of nationally recognized bond counsel that such lease or sale will not affect the tax exemption of interest on the Bonds.

(e) The Bonds will not be federally guaranteed within the meaning of Section 149(b) of the Code. The County will not enter into any leases or sales or service contracts with respect to any facility provided with the proceeds of the Bonds with any federal government agency unless it obtains the opinion of nationally recognized bond counsel that such action will not affect the tax exemption of the Bonds.

Section 9.03 Rebate

(a) In addition to the covenants contained in **Sections 9.01** and **9.02** hereof, the County covenants that:

(1) It will comply with the provisions of Section 148(f) of the Code and applicable Treasury Regulations pertaining to the rebate of certain investment earnings on the proceeds of the Bonds to the United States Government. In this connection, the County covenants to compute, on or before the dates required of it in Section 148(f) of the Code and the applicable Treasury Regulations, the rebateable amounts, if any, pertaining to the Bonds and to pay to the United States Government in a timely fashion all amounts required to be so paid under said Section 148(f) of the Code and applicable Treasury Regulations with respect to the Bonds. In this respect, the County will pay to the United States Government in the manner described in subparagraph (2) below an amount equal to the sum of:

(i) the excess of:

a. The amount earned on all non-purpose investments (as defined in the Treasury Regulations) with respect to the Bonds over

b. The amount which would have been earned if such non-purpose investments were invested at a rate equal to the yield (as defined in the Treasury Regulations) on the Bonds, plus

(ii) any income attributable to such excess.

(2) Such payments shall be made to the United States Government, at the address prescribed in Section 148(f) of the Code and applicable Treasury Regulations, as follows:

(i) Not less frequently than once each five (5) years after the date of issuance of the Bonds, an amount such that, together with prior amounts paid to the United States Government, the total paid to the United States Government is equal to 90% of the amount due as of the date of such payments, and

(ii) Not later than 60 days after the date on which all of the Bonds have been paid in full, all of the amount due as of the date of payment.

(b) In connection with the above, the Chairman or the County Administrator is hereby authorized to make the necessary findings and elections to enable the County to elect to proceed with any spend down exemptions to rebate as may be permitted under said Section 148(f) of the Code and applicable Treasury Regulations as he shall determine in his discretion to be in the best interests of the County.

## ARTICLE X

### AMENDING AND SUPPLEMENTING OF ORDINANCE

#### Section 10.01 Amending and Supplementing of Ordinance Without Consent of Holders of Bonds

(a) The Council, from time to time and at any time and without the consent or concurrence of any Holder of any Bond, may enact an ordinance amendatory hereof or supplemental thereto, if the provisions of such supplemental ordinance shall not materially adversely affect the rights of the Holders of the Bonds then outstanding, for any one or more of the following purposes:

(1) To make any changes or corrections in this Ordinance as to which the Council shall have been advised by counsel that the same are verbal corrections or changes or are required for the purpose of curing or correcting any ambiguity or defective or inconsistent provision or omission or mistake or manifest error contained in this Ordinance, or to insert in this Ordinance such provisions clarifying matters or questions arising under this Ordinance as are necessary or desirable;

(2) To add additional covenants and agreements of the County for the purpose of further securing the payment of the Bonds;

(3) To surrender any right, power or privilege reserved to or conferred upon the County by the terms of this Ordinance;

(4) To grant or confer upon the Bondholders any additional right, remedies, powers, authority or security that lawfully may be granted to or conferred upon them; or

(5) To make such additions, deletions or modifications as may be necessary to assure compliance with Section 148(f) of the Code relating to required rebate to the United States or otherwise as may be necessary to assure the exclusion from gross income of interest on the Bonds for purposes of federal income taxation.

(b) The County shall not enact any supplemental ordinance authorized by the foregoing provisions of this **Section 10.01** unless in the opinion of counsel (which opinion may be combined with the opinion required by **Section 10.04** hereof) the enactment of such supplemental ordinance is permitted by the foregoing provisions of this **Section 10.01** and the provisions of such supplemental ordinance do not adversely affect the rights of the Holders of the Bonds then Outstanding.

#### Section 10.02 Amending and Supplementing of Ordinance With Consent of Holders of Bonds

(a) With the consent of the Holders of not less than a majority in principal amount of the Bonds then Outstanding, the Council from time to time and at any time may enact an ordinance amendatory hereof or supplemental hereto for the purpose of adding any provisions to, or changing in any manner or eliminating any of the provisions of, this Ordinance, or modifying or amending the rights and obligations of the County under this Ordinance, or modifying or amending in any manner the rights of the Holders of the Bonds then Outstanding; provided, however, that, without the specific consent of the Holder of each such Bond which would be affected thereby, no supplemental ordinance amending or supplementing the provisions hereof shall: (i) change the fixed maturity date of any Bond or the dates for the payment of interest thereon or the terms of the redemption thereof, or reduce the principal amount of any Bond or the rate of interest thereon or the redemption price (or the redemption premium) payable upon the redemption or prepayment thereof; (ii) reduce the aforesaid percentage of Bonds, the Holders of which are required to consent to any supplemental ordinance



amending or supplementing the provisions of this Ordinance; or (iii) give to any Bond or Bonds any preference over any other Bond or Bonds secured hereby. Nothing in this paragraph contained, however, shall be construed as making necessary the approval of the Holders of the Bonds of the enactment of any supplemental ordinance authorized by the provisions of **Section 10.01** hereof.

(b) It shall not be necessary that the consents of the Holders of the Bonds approve the particular form of wording of the proposed amendment or supplement or of the supplemental ordinance affecting such amending or supplementing hereof pursuant to this **Section 10.02**. The County shall mail a notice at least once, not more than thirty (30) days after the effective date of such amendment or supplement of such amendment or supplement postage prepaid, to each Holder of Bonds then Outstanding at his address, if any, appearing upon the Books of Registry and to the Paying Agent, but failure to mail copies of such notice to any of the Holders shall not affect the validity of the supplemental ordinance effecting such amendments or supplements or the consents thereto. Nothing in this **Section 10.02(b)** contained, however, shall be construed as requiring the giving of notice of any amendment or supplement of this Ordinance authorized by **Section 10.01** hereof. No action or proceeding to set aside or invalidate such supplemental ordinance or any of the proceedings for its enactment shall be instituted or maintained unless such action or proceeding is commenced within sixty (60) days after the mailing of the notice required by this **Section 10.02(b)**.

#### Section 10.03 Notation Upon Bonds; New Bonds Issued Upon Amendments

Bonds delivered after the effective date of any action taken as provided in this **Article X** may bear a notation as to such action, by endorsement or otherwise and in form approved by the County. In that case, upon demand of the Holder of any Bond Outstanding after such effective date and upon the presentation of the Bond for such purpose at the office of the Paying Agent, and at such additional offices, if any, as the County may select and designate for that purpose, a suitable notation shall be made on such Bond. If the County shall so determine, new Bonds, so modified as in the opinion of the County upon the advice of counsel to conform to the amendments or supplements made pursuant to this **Article X**, shall be prepared, executed, and delivered, and upon demand of the Holder of any Bond then Outstanding shall be exchanged without cost to such Holder for Bonds then Outstanding, upon surrender of such Outstanding Bonds.

#### Section 10.04 Effectiveness of Supplemental Ordinance

Upon the enactment (pursuant to this **Article X** and applicable law) by the Council of any supplemental ordinance amending or supplementing the provisions of this Ordinance and the delivery to the Paying Agent and the Council of an opinion of bond counsel that such supplemental ordinance is in due form and has been duly enacted in accordance with the provisions hereof and applicable law and that the provisions thereof are valid and binding upon the County, or upon such later date as may be specified in such supplemental ordinance, (a) this Ordinance and the Bonds shall be modified and amended in accordance with such supplemental ordinance, (b) the respective rights, limitations of rights, obligations, duties, and immunities under this Ordinance of the County, the Fiduciaries, and the Holders of the Bonds shall thereafter be determined, exercised, and enforced under this Ordinance subject in all respects to such modifications and amendments, and (c) all of the terms and conditions of any such supplemental ordinance shall be a part of the terms and conditions of the Bonds and of this Ordinance for any and all purposes.

#### Section 10.05 Supplemental Ordinance Affecting Fiduciaries

No supplemental ordinance changing, amending or modifying any of the rights, duties and obligations of any Fiduciary appointed by or pursuant to the provisions of this Ordinance may be enacted by the Council or be consented to by the Holders of the Bonds without written consent of such Fiduciary affected thereby.

## ARTICLE XI

### MISCELLANEOUS

#### Section 11.01 Failure to Present Bonds

Anything in this Ordinance to the contrary notwithstanding, any money held by the Paying Agent in trust for the payment and discharge of any of the Bonds, or the interest thereon, which remains unclaimed for such period of time, after the date when such Bonds have become due and payable, that the Holder thereof shall no longer be able to enforce the payment thereof, the Paying Agent shall at the written request of the County pay such money to the County as its absolute property free from trust. The Paying Agent shall thereupon be released and discharged with respect thereto and the Bondholders shall look only to the County for the payment of such Bonds. Provided, however, the Paying Agent shall forward to the County all moneys which remain unclaimed during a period five years from a Bond Payment Date; and further provided, however, that before being required to make any such payment to the County, the Paying Agent, at the expense of the County, may conduct such investigations as may in the opinion of the Paying Agent be necessary to locate the Holders or those who would take if the Holder shall have died.

#### Section 11.02 Severability of Invalid Provisions

If any one or more of the covenants or agreements provided in this Ordinance should be contrary to law, then such covenant or covenants or agreement or agreements shall be deemed severable from the remaining covenants and agreements, and shall in no way affect the validity of the other provisions of this Ordinance.

#### Section 11.03 Successors

Whenever in this Ordinance the County is named or referred to, it shall be deemed to include any entity, which may succeed to the principal functions and powers of the County; and all the covenants and agreements contained in this Ordinance by or on behalf of the County shall bind and inure to the benefit of said successor whether so expressed or not.

#### Section 11.04 Ordinance to Constitute Contract

In consideration of the purchase and acceptance of the Bonds by those who shall purchase and hold the same from time to time, the provisions of this Ordinance shall be deemed to be and shall constitute a contract between the County and the Holders from time to time of the Bonds. Such provisions are covenants and agreements with such Holders which the County hereby determines to be necessary and desirable for the security and payment thereof. The pledge hereof and the provisions, covenants, and agreements herein set forth to be performed on behalf of the County shall be for the equal benefit, protection, and security of the Holders of any and all of the Bonds, all of which shall be of equal rank without preference, priority or distinction of any Bonds over any other Bonds.

#### Section 11.05 Filing of Copies of Ordinance

Copies of this Ordinance shall be filed in the office of the Council, the office of the Clerk of Court for the County (as a part of the Transcript of Proceedings) and at the offices of each of the Paying Agent and Registrar.

#### Section 11.06 Further Action by Officers of County

The proper officers of the County are fully authorized and empowered to take the actions required to implement the provisions of this Ordinance and to furnish such certificates and other proofs as may be required of them, which include but are not limited to providing the notice and conducting the public hearing described in **Section 1.03** hereof.

#### Section 11.07 Continuing Disclosure

(a) Pursuant to Section 11-1-85 of the South Carolina Code, the County covenants to file with a central repository for availability in the secondary bond market when requested:

- (1) An annual independent audit, within thirty days of the County's receipt of the audit; and
- (2) Event specific information within thirty days of an event adversely affecting more than five percent of revenue or the County's tax base.

The only remedy for failure by the County to comply with the covenant in this **Section 11.07(a)** shall be an action for specific performance of this covenant. The County specifically reserves the right to amend this covenant to reflect any change in (including any repeal of) Section 11-1-85, without the consent of any Bondholder.

(b) In addition, the County hereby covenants and agrees that it will comply with and carry out all of the provisions of the Continuing Disclosure Agreement. Notwithstanding any other provision of this Ordinance, failure of the County to comply with the Continuing Disclosure Agreement shall not be considered an event of default; however, any Bondholder may take such actions as may be necessary and appropriate, including seeking mandamus or specific performance by court order, to cause the County to comply with its obligations under this **Section 11.07(b)**. The Continuing Disclosure Agreement shall be executed by an Authorized Officer prior to the delivery of the Bonds and shall be in such form as is set forth in Exhibit B hereto, together with such modifications and amendments thereto as shall be deemed necessary by such Authorized Officer, upon advice of counsel. The execution of the Continuing Disclosure Agreement shall constitute conclusive evidence of the approval by the person executing the same of any and all modifications and amendments thereto.

#### Section 11.08 Effective Date of this Ordinance

This Bond Ordinance shall take effect upon its third reading.

**DONE** in meeting duly assembled, this \_\_\_\_ day of \_\_\_\_\_, 2024.

BEAUFORT COUNTY, SOUTH CAROLINA

\_\_\_\_\_  
Chairman of County Council

Attest:

\_\_\_\_\_  
Clerk to County Council  
Beaufort County, South Carolina

First reading: \_\_\_\_\_, 2024  
Second reading: \_\_\_\_\_, 2024  
Third reading: \_\_\_\_\_, 2024  
Public hearing: \_\_\_\_\_, 2024

**EXHIBIT A****(FORM OF BOND)**

UNITED STATES OF AMERICA  
STATE OF SOUTH CAROLINA  
BEAUFORT COUNTY  
GENERAL OBLIGATION BONDS OF 2025

No. R-\_\_

INTEREST RATE	MATURITY DATE	ORIGINAL ISSUE DATE	CUSIP
---------------	---------------	---------------------	-------

Registered Holder: CEDE &amp; CO.

Principal Amount: \_\_\_\_\_ DOLLARS (\$\_\_\_\_\_)

**BEAUFORT COUNTY, SOUTH CAROLINA** (the “*County*”), a body corporate and politic and a political subdivision of the State of South Carolina (the “*State*”), acknowledges itself indebted and for value received hereby promises to pay, solely as hereinafter provided, to the Registered Holder (named above) or registered assigns, the Principal Amount set forth above on the Maturity Date stated above, unless this Bond be subject to redemption and shall have been redeemed prior thereto as hereinafter provided, upon presentation and surrender of this Bond at \_\_\_\_\_ (the “*Paying Agent*”), and to pay interest on such Principal Amount at the annual Interest Rate stated above (calculated on the basis of a 360-day year of twelve 30-day months), until the obligation of the County with respect to the payment of such Principal Amount shall be discharged.

This Bond bears interest from the original issue date if no interest has yet been paid; otherwise from the last date to which interest has been paid and which date is on or prior to the date of this Bond’s authentication. Interest on this Bond is payable on March 1 and September 1 of each year (each a “*Bond Payment Date*”) beginning March 1, 2025. The interest so payable on any March 1 or September 1 shall be payable to the person in whose name this Bond is registered at the close of business on February 15 or August 15 (each, a “*Record Date*”) next preceding such March 1 or September 1.

The principal of all Bonds shall be payable at maturity at the Corporate Trust Office of the Paying Agent and payment of the interest on each Bond shall be made on each Bond Payment Date by the Paying Agent. Interest hereon shall be payable by check or draft mailed at the times provided in the Ordinance (as defined below) from the office of the Paying Agent to the person in whose name this Bond is registered on the applicable Record Date at the address shown on the registration books. The principal of, redemption premium, if any, and interest on this Bond are payable in any coin or currency of the United States of America which at the time of payment is legal tender for the payment of public and private debts; provided, however, that payment of the interest on this Bond shall be effected by check or draft as set forth above.

This Bond is one of an issue of Bonds in the aggregate principal amount of \_\_\_\_\_ Dollars (\$\_\_\_\_\_) of like tenor, except as to number, rate of interest, date of maturity and redemption provisions and issued pursuant to and in accordance with the Constitution and statutes of the State, including particularly the provisions of Title 4, Chapter 15, as supplemented by Section 11-27-40, of the Code of Laws of South Carolina, 1976, as amended (collectively, the “*Enabling Act*”), and an Ordinance duly enacted on \_\_\_\_\_, 2024 by the County Council of the County (the “*Ordinance*”).

Certain capitalized terms used herein and not otherwise defined shall have the meanings ascribed thereto in the Ordinance. Certified copies of the Ordinance are on file in the office of the Clerk to County Council, in the offices of the Registrar and Paying Agent and in the office of the Clerk of Court of the County.

For the prompt payment thereof, both principal and interest, as the same shall become due, the full faith, credit and taxing power of the County are irrevocably pledged.

This Bond and the interest hereon are exempt from all State, county, municipal, school district, and all other taxes or assessments imposed within the State, direct or indirect, general or special, whether imposed for the purpose of general revenue or otherwise, except inheritance, estate, transfer and certain franchise taxes. The Bonds are issuable only as fully registered Bonds without coupons in the denomination of \$5,000 or any multiple thereof not exceeding the principal amount of the Bonds maturing in each year.

This Bond is transferable, as provided in the Ordinance, only upon the registration books kept for that purpose at the Corporate Trust Office of the Registrar by the Registered Holder in person or by his duly authorized attorney, upon (i) surrender of this Bond together with a written instrument of transfer satisfactory to the Registrar duly executed by the Registered Holder or his duly authorized attorney and (ii) payment of the charges, if any, prescribed in the Ordinance. Thereupon a new fully registered Bond or Bonds of like maturity, interest rate and redemption provisions and in a like aggregate principal amount shall be issued to the transferee in exchange therefor as provided in the Ordinance. The County, the Registrar and the Paying Agent may deem and treat the person in whose name this Bond is registered as the absolute owner hereof for the purpose of receiving payment of or on account of the principal hereof and interest due hereon and for all other purposes.

For every exchange or transfer of the Bonds, the County, the Registrar or the Paying Agent may make a charge sufficient to reimburse it for any tax, fee or other governmental charge required to be paid with respect to such exchange or transfer.

So long as Cede & Co., as nominee of Depository Trust Company ("**DTC**") is the Registered Holder of the Bonds, references in this Bond to the Bondholders or Registered Holder of the Bonds shall mean Cede & Co. and shall not mean the beneficial owners.

The County, the Registrar and the Paying Agent may treat DTC (or its nominee) as the sole and exclusive owner of the Bonds registered in its name for the purpose of paying the principal of or interest or premium, if any, on the Bonds, giving any notice permitted or required to be given to Bondholders under the Ordinance, registering the transfer of Bonds, obtaining any consent or action to be taken by Bondholders and for all other purposes whatsoever, and shall not be affected by any notice to the contrary. The County, the Registrar and the Paying Agent shall not have any responsibility or obligation to any direct participant, any person claiming a beneficial ownership in the Bonds under or through DTC or any Direct Participant or any other person which is not shown on the Registration Books of the County (kept by the Registrar) as being a Bondholder with respect to: the accuracy of any records maintained by DTC or any Direct Participant; the payment by DTC or any Direct Participant of any amount in respect of the principal of or interest or premium, if any, on the Bonds; any notice which is permitted or required to be given to Bondholders thereunder or under the conditions for transfers or exchanges adopted by the County; or any consent given or other action taken by DTC as a Bondholder.

The Bonds maturing on or after March 1, 20\_\_, may be redeemed in whole or in part at any time, on or after March 1, 20\_\_, by the County at the redemption price of 100% of the principal amount thereof plus accrued interest to such redemption date.

[The Bonds maturing on March 1, 20\_\_, shall be subject to mandatory sinking fund redemption (to the extent not previously redeemed) at a redemption price of 100% of such principal amount, plus interest accrued to the redemption date, on March 1 of each of the following years in the respective principal amounts for each year specified below:

<u>Year</u>	<u>Amount</u>
-------------	---------------

\_\_\_\_\_  
\*Final Maturity

The amount of any mandatory sinking fund redemptions shall be reduced to the extent Bonds of the applicable maturity have been purchased by the County or redeemed by the County pursuant to any optional redemption provisions, in such manner as the County shall direct, or, absent such direction, on a pro rata basis.]

It is hereby certified and recited that all conditions, acts and things required by the Constitution and Statutes of the State to exist, be performed or happen precedent to or in the issuance of this Bond, exist, have been performed and have happened, that the amount of this Bond, together with all other indebtedness of the County, does not exceed any limit prescribed by such Constitution or Statutes, and that provision has been made for the allocation, on an annual basis, of sufficient tax revenues to provide for the punctual payment of the principal of and interest on this Bond and the issue of Bonds of which this Bond is one.

This Bond shall not be valid or obligatory for any purpose until the Certificate of Authentication hereon shall have been duly executed by the Registrar.

**IN WITNESS WHEREOF**, Beaufort County, South Carolina has caused this Bond to be signed in its name by the Chairman of County Council of Beaufort County, South Carolina, and its corporate seal to be hereunto impressed and attested to by the Clerk to the Beaufort County Council.

(SEAL)

BEAUFORT COUNTY, SOUTH CAROLINA

By: \_\_\_\_\_  
Chairman of County Council

Attest:

\_\_\_\_\_  
Clerk to County Council

#### CERTIFICATE OF AUTHENTICATION

This Bond is one of the Bonds of the issue described in the within mentioned Ordinance.

\_\_\_\_\_,  
as Registrar

By: \_\_\_\_\_

Its: Authorized Officer

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

(FORM OF ASSIGNMENT)

**FOR VALUE RECEIVED** the undersigned hereby sells, assigns and transfers unto \_\_\_\_\_ (please print or type name and address of Transferee and Social Security or other identifying number of Transferee) the within Bond and all rights and title thereunder, and hereby irrevocably constitutes and appoints \_\_\_\_\_ attorney to transfer the within Bond on the books kept for registration thereof, with full power of substitution in the premises.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature Guaranteed

NOTICE: Signature(s) must be guaranteed by an institution which is a participant in the Securities Transfer Agents Medallion Program ("**STAMP**") or similar program enlargement.

\_\_\_\_\_  
Authorized Individual or Officer

NOTICE: The signature to the assignment must correspond with the name of the registered owner as it appears upon the face of the within Bond in every particular, without alteration or any change whatever.



**EXHIBIT B****CONTINUING DISCLOSURE AGREEMENT**

This Continuing Disclosure Certificate (the “**Disclosure Certificate**”) is executed and delivered by Beaufort County, South Carolina (the “**Issuer**”) in connection with the issuance of \$\_\_\_\_\_ General Obligation Bonds of 2025 of Beaufort County, South Carolina (collectively, the “**Bonds**”). The Bonds are being issued pursuant to an Ordinance adopted on \_\_\_\_\_, 2024 (the “**Ordinance**”). The Issuer covenants and agrees as follows:

**SECTION 1. Purpose of the Disclosure Certificate.** This Disclosure Certificate is being executed and delivered by the Issuer for the benefit of the Bondholders and in order to assist the Participating Underwriters in complying with Securities Exchange Commission Rule 15c2-12(b)(5).

**SECTION 2. Definitions.** In addition to the definitions set forth in the Ordinance, which apply to any capitalized term used in this Disclosure Certificate unless otherwise defined in this Section, the following capitalized terms shall have the following meanings:

“Annual Report” shall mean any Annual Report provided by the Issuer pursuant to, and as described in, Sections 3 and 4 of this Disclosure Certificate.

“Beneficial Owner” shall mean any person which (a) has the power, directly or indirectly, to vote or consent with respect to, or to dispose of ownership of, any Bonds (including persons holding Bonds through nominees, depositories or other intermediaries) or (b) is treated as the owner of any Bonds for federal income tax purposes.

“Bondholder” or “Holder” shall mean the registered owner of a Bond and any Beneficial Owner thereof.

“Dissemination Agent” shall mean the Issuer or any successor Dissemination Agent designated in writing by the Issuer and which has filed with the Issuer a written acceptance of such designation.

“Listed Events” shall mean any of the events listed in Section 5(a) of this Disclosure Certificate.

“Participating Underwriter” shall mean any of the original underwriters of the Bonds required to comply with the Rule in connection with offering of the Bonds.

“Repository” shall mean for purposes of the Rule the Municipal Securities Rulemaking Board (through its Electronic Municipal Market Access (“**EMMA**”) system).

“Rule” shall mean Rule 15c2-12(b)(5) adopted by the Securities and Exchange Commission under the Securities Exchange Act of 1934, as the same may be amended from time to time.

**SECTION 3. Provision of Annual Reports.**

(a) The Issuer shall, or shall cause the Dissemination Agent to, not later than seven months after the end of each fiscal year of the Issuer (currently June 30), commencing with the fiscal year ending June 30, 2025, provide to the Repository an Annual Report which is consistent with the requirements of Section 4 of this Disclosure Certificate. Not later than 15 business days prior to said date, the Issuer shall provide the Annual Report to the Dissemination Agent, if other than the Issuer. The Annual Report may be submitted as a single document or as separate documents comprising a package, and may cross-reference

other information as provided in Section 4 of this Disclosure Certificate; provided that the audited financial statements of the Issuer may be submitted separately from the balance of the Annual Report.

(b) If the Issuer is unable to provide to the Repository an Annual Report by the date required in subsection (a), the Issuer shall send a notice to the Repository in substantially the form attached as Appendix I.

(c) The Dissemination Agent shall:

(i) determine each year prior to the date for providing the Annual Report the name and address of the Repository, if any; and,

(ii) if the Dissemination Agent is other than the Issuer, file a report with the Issuer certifying that the Annual Report has been provided pursuant to this Disclosure Certificate, stating the date it was provided to the Repository.

**SECTION 4. Content of Annual Reports.** The Issuer's Annual Report shall include the Issuer's complete audited financial statements prepared in accordance with generally accepted accounting principles as promulgated to apply to governmental entities from time to time by the Governmental Accounting Standards Board. If the Issuer's audited financial statements are not available by the time the Annual Report is required to be filed pursuant to Section 3(a), the Annual Report shall contain unaudited financial statements in a format similar to the financial statements contained in the final Official Statement, and the audited financial statements shall be filed in the same manner as the Annual Report when they become available. In addition thereto, the Issuer's Annual Report shall contain or incorporate by reference the following:

- (a) Assessed Value of taxable property in Beaufort County;
- (b) Tax levy for Beaufort County for current fiscal year;
- (c) Tax collections for Beaufort County for preceding fiscal year; and
- (d) Ten largest taxpayers for Beaufort County for preceding fiscal year.

Any or all of the items listed above may be incorporated by reference from other documents, including official statements of debt issues of the Issuer or related public entities, which have been submitted to the Repository or the Securities and Exchange Commission. If the document incorporated by reference is a final official statement, it must be available from the Repository. The Issuer shall clearly identify each such other document so incorporated by reference.

**SECTION 5. Reporting of Significant Events.**

Pursuant to the provisions of this Section 5, the Issuer shall give, or cause to be given, notice of the occurrence of any of the following events with respect to the Bonds within ten business days of the occurrence thereof:

- 1. "Principal and interest payment delinquencies;"
- 2. "Non-Payment related defaults, if material;"
- 3. "Unscheduled draws on debt service reserves reflecting financial difficulties;"
- 4. "Unscheduled draws on credit enhancements reflecting financial difficulties;"

5. “Substitution of credit or liquidity providers, or their failure to perform;”
6. “Adverse tax opinions, the issuance by the Internal Revenue Service of proposed or final determinations of taxability. Notices of Proposed Issue (IRS Form 5701-TEB) or other material notices or determinations with respect to the tax status of the Bonds, or other material events affecting the tax status of the Bonds;”
7. “Modifications to rights of securities holders, if material;”
8. “Bond calls, if material, and tender offers;”
9. “Defeasances;”
10. “Release, substitution, or sale of property securing repayment of the securities, if material;”
11. “Rating changes;”
12. “Bankruptcy, insolvency, receivership or similar event of the obligated person;”
13. “Merger, consolidation, or acquisition of the obligated person, if material;”
14. “Appointment of a successor or additional trustee, or the change of name of a trustee, if material;”
15. “Incurrence of a financial obligation of the obligated person, if material, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a financial obligation of the obligated person, any of which affect security holders, if material;” and
16. “Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a financial obligation of the obligated person, any of which reflect financial difficulties.

SECTION 6. Termination of Reporting Obligation. The Issuer's obligations under this Disclosure Certificate shall terminate upon the defeasance, prior redemption or payment in full of all of the Bonds.

SECTION 7. Dissemination Agent. The Issuer may, from time to time, appoint or engage a Dissemination Agent to assist it in carrying out its obligations under this Disclosure Certificate, and may discharge any such Agent, with or without appointing a successor Dissemination Agent. The initial Dissemination Agent shall be the Issuer.

SECTION 8. Amendment; Waiver. Notwithstanding any other provision of this Disclosure Certificate, the Issuer may amend this Disclosure Certificate, and any provision of this Disclosure Certificate may be waived, if such amendment or waiver is supported by an opinion of counsel expert in federal securities laws, to the effect that such amendment or waiver would not, in and of itself, cause the undertakings herein to violate the Rule if such amendment or waiver had been effective on the date hereof but taking into account any subsequent change in or official interpretation of the Rule.

SECTION 9. Additional Information. Nothing in this Disclosure Certificate shall be deemed to prevent the Issuer from disseminating any other information, using the means of dissemination set forth in

this Disclosure Certificate or any other means of communication, or including any other information in any Annual Report or notice of occurrence of a Listed Event, in addition to that which is required by this Disclosure Certificate. If the Issuer chooses to include any information in any Annual Report or notice of occurrence of a Listed Event in addition to that which is specifically required by this Disclosure Certificate, the Issuer shall have no obligation under this Agreement to update such information or include it in any future Annual Report or notice of occurrence of a Listed Event.

SECTION 10. Default. In the event of a failure of the Issuer to comply with any provision of this Disclosure Certificate, any Bondholder may take such actions as may be necessary and appropriate, including seeking mandamus or specific performance by court order, to cause the Issuer to comply with its obligations under this Disclosure Certificate. A default under this Disclosure Certificate shall not be deemed an event of default under the Ordinance, and the sole remedy under this Disclosure Certificate in the event of any failure of the Issuer to comply with this Disclosure Certificate shall be an action to compel performance.

SECTION 11. Duties, Immunities and Liabilities of Dissemination Agent. The Dissemination Agent shall have only such duties as are specifically set forth in this Disclosure Certificate, and the Issuer agrees to indemnify and save the Dissemination Agent, its officers, directors, employees and agents, harmless against any loss, expense and liabilities which it may incur arising out of or in the exercise or performance of its powers and duties hereunder, including the costs and expenses of defending against any claim of liability, but excluding liabilities due to the Dissemination Agent's gross negligence or willful misconduct. The obligations of the Issuer under this Section shall survive resignation or removal of the Dissemination Agent and payment of the Bonds.

SECTION 12. Beneficiaries. This Disclosure Certificate shall inure solely to the benefit of the Issuer, the Dissemination Agent, the Participating Underwriters and Holders from time to time of the Bonds, and shall create no rights in any other person or entity.

BEAUFORT COUNTY, SOUTH CAROLINA

By: \_\_\_\_\_  
Chairman of County Council  
Beaufort County, South Carolina

Date: \_\_\_\_\_, 2025

## APPENDIX I

## NOTICE TO REPOSITORY OF FAILURE TO FILE ANNUAL REPORT

Name of Issuer: Beaufort County, South Carolina

Name of Bond Issue: \$\_\_\_\_\_ General Obligation Bonds of 2025

Date of Issuance: \_\_\_\_\_, 2025

NOTICE IS HEREBY GIVEN that the Issuer has not provided an Annual Report with respect to the above-named Bonds as required by an Ordinance adopted on \_\_\_\_\_, 2024. The Issuer anticipates that the Annual Report will be filed by \_\_\_\_\_.

BEAUFORT COUNTY, SOUTH CAROLINA

By:\_\_\_\_\_

Title:\_\_\_\_\_

STATE OF SOUTH CAROLINA       )  
   )  
 COUNTY OF BEAUFORT               )       CERTIFIED COPY OF ORDINANCE

I, the undersigned, Clerk to County Council of Beaufort County, South Carolina, **DO HEREBY CERTIFY:**

That the foregoing constitutes a true, correct and verbatim copy of an Ordinance which was given three readings on three separate days, with an interval of not less than seven days between the second and third readings. The original of this Ordinance is duly entered in the permanent records of minutes of meetings of the County Council, in my custody as such Clerk.

That each of said meetings was duly called, and all members of the County Council were notified of the same; that a quorum of the membership remained throughout the proceedings incident to the enactment of this Ordinance.

**IN WITNESS WHEREOF**, I have hereunto set my Hand \_\_\_\_ day of \_\_\_\_\_, 2024.

\_\_\_\_\_  
 Clerk, Beaufort County Council



# First Tryon Advisors

SIMPLIFYING PUBLIC FINANCE

**DAVID CHEATWOOD**  
MANAGING DIRECTOR  
Office: 704.926.2447  
Email: [dcheatwood@firsttryon.com](mailto:dcheatwood@firsttryon.com)  
6101 Carnegie Blvd Suite 210  
Charlotte NC 28209

# Existing GO Bond Debt – As of 6/30/2024

- As of June 30, 2024 the County had approximately \$144 million of General Obligation Bond debt outstanding (excluding issuances on behalf of County fire districts).
- Of this amount, approximately \$86.7 million was voter approved and \$57.3 million was issued under the County's 8% capacity.
- The County services this debt from a combination of debt service millage, real property millage and Bluffton Parkway revenues.

General Obligation Bonds - Debt Service Millage							
Series	Description	Par Outstanding	Final Maturity	Call Provision	Avg. Coupon	Use of Proceeds	Included in 8% Debt?
Series 2012C	General Obligation Refunding Bonds	910,674	2/1/2025	Non-Callable	3.000%	Refund Series 2004	Yes
Series 2013C	General Obligation Refunding Bonds	2,650,714	3/1/2026	3/1/2023	3.250%	Refund Series 2006 & 2006B	Yes
Series 2014A	General Obligation Bonds	8,457,919	3/1/2034	3/1/2024	3.096%	Capital Projects	Yes
Series 2014A	General Obligation Bonds	2,927,081	3/1/2034	3/1/2024	3.096%	Capital Projects	-
Series 2014B	General Obligation Refunding Bonds	5,476,293	3/1/2029	3/1/2024	3.476%	Refund Series 2010B	Yes
Series 2017A	General Obligation Bonds	25,082,354	2/1/2037	2/1/2027	3.720%	Capital Improvements	Yes
Series 2017A	General Obligation Bonds	4,823,528	2/1/2037	2/1/2027	3.720%	Capital Improvements	-
Series 2019A	General Obligation Bonds	9,240,000	3/1/2039	3/1/2028	3.517%	Capital Improvements	Yes
Series 2020	General Obligation Bonds	5,535,000	3/1/2040	3/1/2029	2.472%	Capital Improvements	Yes
Total		65,103,563			3.426%		

General Obligation Bonds - Real Property Millage							
Series	Description	Par Outstanding	Final Maturity	Call Provision	Avg. Coupon	Use of Proceeds	Included in 8% Debt?
Series 2012C	General Obligation Refunding Bonds	1,734,327	2/1/2025	Non-Callable	3.000%	Refund Series 2004	-
Series 2013B	General Obligation Bonds	12,905,000	5/1/2033	5/1/2023	3.546%	Capital Projects	-
Series 2014B	General Obligation Refunding Bonds	3,808,707	3/1/2029	3/1/2024	3.476%	Refund Series 2010B	-
Series 2016A	General Obligation Refunding Bonds	4,976,384	3/1/2027	Non-Callable	3.330%	Refund Series 2007	-
Series 2017A	General Obligation Bonds	19,294,118	2/1/2037	2/1/2027	3.720%	Capital Improvements	-
Series 2020	General Obligation Bonds	23,955,000	3/1/2040	3/1/2029	2.470%	Capital Improvements	-
Series 2021	General Obligation Refunding Bonds	5,600,000	3/1/2031	Non-Callable	5.000%	Refund Series 2011 GO	-
Total		72,273,536			3.317%		

General Obligation Bonds - Bluffton Parkway Revenues							
Series	Description	Par Outstanding	Final Maturity	Call Provision	Avg. Coupon	Use of Proceeds	Included in 8% Debt?
Series 2013C	General Obligation Refunding Bonds	5,159,286	3/1/2026	3/1/2023	3.250%	Refund Series 2006 & 2006B	-
Series 2016A	General Obligation Refunding Bonds	1,368,617	3/1/2027	Non-Callable	3.330%	Refund Series 2007	-
Total		6,527,903			3.267%		

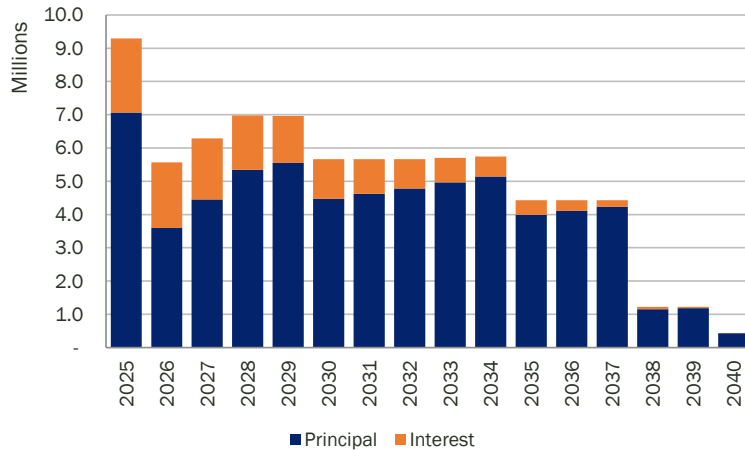
Grand Total	143,905,002	3.377%
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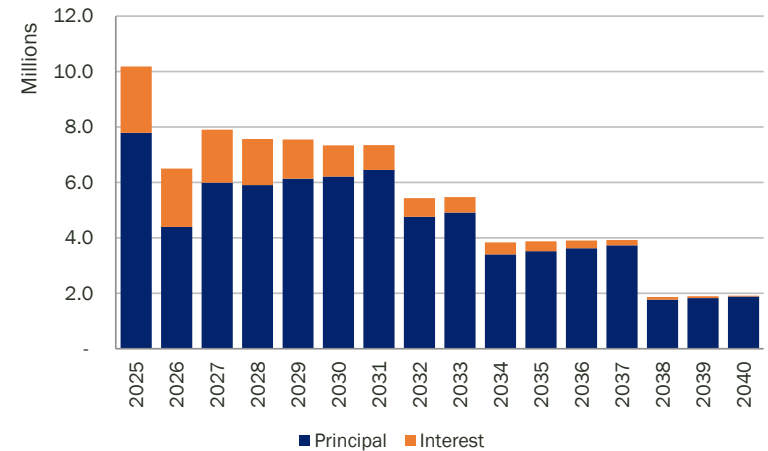


# Existing GO Bond Debt Service — As of 6/30/2024

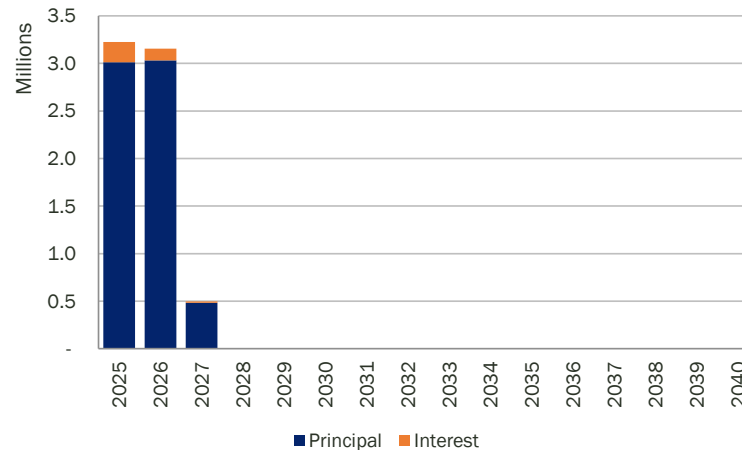
## General Obligation Bonds — Debt Service Millage



## General Obligation Bonds — Real Property Millage

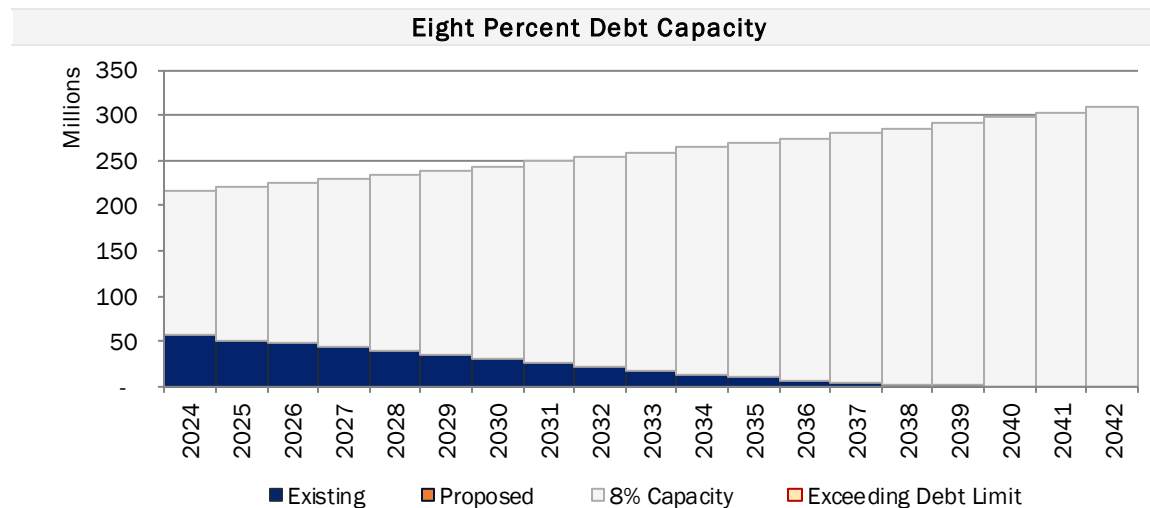


## General Obligation Bonds — Bluffton Parkway Revenues



# 8% Debt Capacity

- The County is permitted to issue General Obligation Bonds without voter approval in an amount equal to 8% of the Assessed Value of all taxable property in the County.
- Based on the County's FY2024 Assessed Value of \$2,654,721,069, the County's constitutional debt limit was \$212,377,686.
- Following the payment of outstanding General Obligation Bond principal in FY2024, the County will have \$57,352,954 of General Obligation Bond debt that counts against this limit, leaving \$155,024,732 of capacity.
  - This capacity will continue to grow as the County pays down existing debt and its Assessed Value increases.



# Identified Capital Needs

- The County has identified \$68.6 million of capital projects that it is considering funding through the issuance of a General Obligation Bond, including County projects totaling \$52.6 million, Beaufort Memorial Hospital (the “Hospital”) projects totaling \$10 million and a project totaling \$6 million for Technical College of the Lowcountry (“TCL”).

Project Description	Amount
Public Works Capital Projects	\$25,075,000
Facilities Capital Projects	\$100,000
Public Safety Capital Projects	\$627,227
Sherriff's Office Capital Projects	\$965,000
DSN Capital Projects	\$78,700
Parks and Rec Capital Projects	\$1,830,000
Community Center Capital Projects	\$5,000,000
Passive Parks Capital Projects	\$5,940,912
St. James Church	\$3,500,000
Future Government Complex	\$9,500,000
Sub-Total	\$52,616,839
Affordable Housing (BMH)	\$2,000,000
New Hospital Project (BMH)	\$8,000,000
New Workforce Training Facility (TCL)	\$6,000,000
Sub-Total	\$16,000,000
<b>Total</b>	<b>\$68,616,839</b>

# Repayment Sources

## › County

- › In FY2024, the County levied 3.4 debt service mills which, based on a value of a mill of \$2.65 million, generated approximately \$9 million in property tax revenues in FY2024.
- › Assuming a 3% growth in the value of a mill and a reduction in the millage rate to 3.2 mills in FY2025, property tax revenue would be approximately \$8.65 million.
- › In addition, the County's debt service fund had a 6/30/24 ending fund balance of approximately \$18 million which would be used to pay for a portion of the debt service on a GO bond issue.
  - › The analysis that follows assumes that the County "upsizes" the first principal payment due on March 1, 2025 to bring down the balance in the debt service fund to approximately \$5 million which is approximately half of the County's future annual debt service.

## › Beaufort Memorial Hospital

- › In FY2024, the County levied 0.4 mills for the Hospital which, based on a value of a mill of \$2.65 million, generated approximately \$1.06 million in property tax revenues in FY2024 which was approximately \$200,000 in excess of what the Hospital received in the prior year due to reassessment.
- › In FY2025, the County increased the millage rate to 0.6 mills for the Hospital. If it applied the \$200,000 in excess and the additional \$540,000 that the additional 0.2 mills will generate, this \$740,000 in aggregate revenue could be applied towards the payment of debt service for the Hospital's projects.

## › Higher Education Fund

- › In FY2024, the County levied 2.2 mills for its Higher Education Fund which, based on a value of a mill of \$2.65 million, generated approximately \$5.83 million in property tax revenues in FY2024.
- › Of this amount, 1.1 mills was earmarked for USCB and 1.1 mills was earmarked for TCL which was approximately \$200,000 in excess of what each entity received in the prior year due to reassessment.
- › In FY2025, the County increased the millage rate to 2.3 mills for the Higher Education Fund (1.2 mills for TCL). If it applied the \$200,000 in excess and the additional \$270,000 that the additional 0.1 mills will generate, this \$470,000 in aggregate revenue could be applied towards the payment of debt service for TCL's projects.

# Plan of Finance (County Projects)

- The table below shows the impact of funding the \$52.6 million of County projects with the issuance of a GO Bond issued under the County's 8% capacity and serviced by 3.2 debt service mills assuming a 25-year repayment term and estimated current market rates.

Tax Levy	Debt Service Paid	Millage Rate	Value of a Mill	Assumed Growth Rate	Collection Percentage	Millage Collections	Bluffton Pkwy Admission Taxes & Fees	Existing Debt Service	Proposed Debt Service	Total Debt Service	Surplus (Deficit)	Use of Fund Balance	Fund Balance
Total													
2022	2023	5.60	2,261,466		100.00%	12,664,210	3,169,016	14,782,332	-	14,782,332	1,050,893	-	4,199,865
2023	2024	3.40	2,650,000	17.18%	100.00%	9,010,000	3,182,640	12,789,956	-	12,789,956	(597,316)	(597,316)	16,884,672
2024	2025	3.20	2,705,000	2.08%	100.00%	8,656,000	3,181,256	12,343,529	11,194,609	23,538,138	(11,700,882)	(11,700,882)	5,183,791
2025	2026	3.20	2,786,150	3.00%	100.00%	8,915,680	3,100,212	8,599,417	3,296,700	11,896,117	119,775	-	5,303,565
2026	2027	3.20	2,869,735	3.00%	100.00%	9,183,149	490,416	6,681,822	2,871,700	9,553,522	120,043	-	5,423,608
2027	2028	3.20	2,927,129	2.00%	100.00%	9,366,813	-	6,869,901	2,376,950	9,246,851	119,961	-	5,543,569
2028	2029	3.20	2,985,672	2.00%	100.00%	9,554,147	-	6,852,149	2,587,200	9,439,349	114,798	-	5,658,367
2029	2030	3.20	3,045,385	2.00%	100.00%	9,745,232	-	5,586,800	2,658,200	8,245,000	1,500,232	-	7,158,600
2030	2031	3.20	3,106,293	2.00%	100.00%	9,940,134	-	5,583,244	2,659,825	8,243,069	1,697,066	-	8,855,665
2031	2032	3.20	3,168,419	2.00%	100.00%	10,138,938	-	5,595,176	2,658,700	8,253,876	1,885,062	-	10,740,727
2032	2033	3.20	3,231,787	2.00%	100.00%	10,341,718	-	5,633,836	2,659,700	8,293,536	2,048,183	-	12,788,910
2033	2034	3.20	3,296,423	2.00%	100.00%	10,548,550	-	5,664,003	2,662,575	8,326,578	2,221,972	-	15,010,882
2034	2035	3.20	3,362,351	2.00%	100.00%	10,759,523	-	4,370,905	2,662,200	7,033,105	3,726,418	-	18,737,300
2035	2036	3.20	3,429,598	2.00%	100.00%	10,974,714	-	4,368,284	2,658,575	7,026,859	3,947,854	-	22,685,155
2036	2037	3.20	3,498,190	2.00%	100.00%	11,194,208	-	4,367,422	2,661,450	7,028,872	4,165,336	-	26,850,491
2037	2038	3.20	3,568,154	2.00%	100.00%	11,418,093	-	1,206,938	2,660,575	3,867,513	7,550,580	-	34,401,071
2038	2039	3.20	3,639,517	2.00%	100.00%	11,646,454	-	1,209,741	2,660,825	3,870,566	7,775,889	-	42,176,960
2039	2040	3.20	3,712,308	2.00%	100.00%	11,879,382	-	439,078	2,661,950	3,101,028	8,778,354	-	50,955,314
2040	2041	3.20	3,786,554	2.00%	100.00%	12,116,970	-	-	2,658,050	2,658,050	9,458,920	-	60,414,234
2041	2042	3.20	3,862,285	2.00%	100.00%	12,359,309	-	-	2,659,750	2,659,750	9,699,559	-	70,113,793
2042	2043	3.20	3,939,530	2.00%	100.00%	12,606,496	-	-	2,658,450	2,658,450	9,948,046	-	80,061,839
2043	2044	3.20	4,018,321	2.00%	100.00%	12,858,627	-	-	2,659,050	2,659,050	10,199,577	-	90,261,416
2044	2045	3.20	4,098,688	2.00%	100.00%	13,115,798	-	-	2,661,350	2,661,350	10,454,448	-	100,715,864
2045	2046	3.20	4,180,661	2.00%	100.00%	13,378,115	-	-	2,657,506	2,657,506	10,720,609	-	111,436,473
2046	2047	3.20	4,264,275	2.00%	100.00%	13,645,677	-	-	2,662,094	2,662,094	10,983,583	-	122,420,056
2047	2048	3.20	4,349,560	2.00%	100.00%	13,918,589	-	-	2,657,538	2,657,538	11,261,051	-	133,681,107
2048	2049	3.20	4,436,551	2.00%	100.00%	14,196,963	-	-	2,658,731	2,658,731	11,538,232	-	145,219,339
2049	2050	3.20	4,525,282	2.00%	100.00%	14,480,902	-	-	2,660,356	2,660,356	11,820,546	-	157,039,886

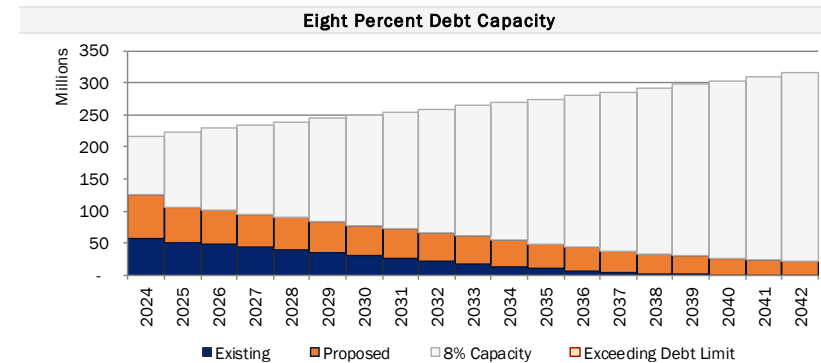
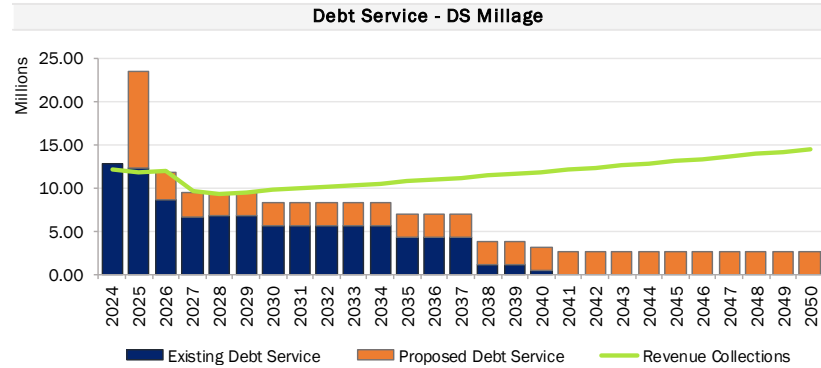
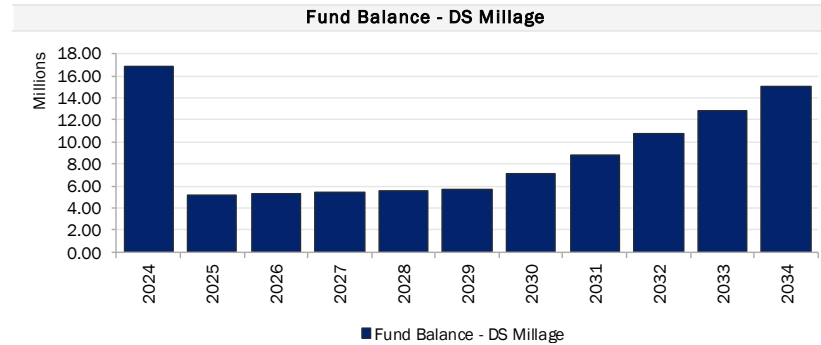
# Estimated Debt Service (County Projects)

- The table below shows the estimated debt service on the portion of the GO Bond related to the County's projects.

Sources of Funds	
Par Amount	52,820,000
Premium	2,166,737
Equity Contribution	-
<b>Total Sources of Funds</b>	<b>54,986,737</b>
Uses of Funds	
<b>Project Fund</b>	<b>52,616,839</b>
Debt Service Fund	1,902,637
Costs of Issuance	200,000
Underwriter's Discount	264,100
Additional Proceeds	3,161
<b>Total Uses of Funds</b>	<b>54,986,737</b>

Debt Service Requirements				
Period Ending	Principal	Interest	Debt Service Fund	Net Debt Service
	52,820,000	27,267,246	(1,902,637)	78,184,609
3/1/2025	12,000,000	170,396	(1,902,637)	10,267,759
9/1/2025	-	926,850	-	926,850
3/1/2026	1,480,000	926,850	-	2,406,850
9/1/2026	-	889,850	-	889,850
3/1/2027	1,120,000	889,850	-	2,009,850
9/1/2027	-	861,850	-	861,850
3/1/2028	670,000	861,850	-	1,531,850
9/1/2028	-	845,100	-	845,100
3/1/2029	920,000	845,100	-	1,765,100
9/1/2029	-	822,100	-	822,100
3/1/2030	1,040,000	822,100	-	1,862,100
9/1/2030	-	796,100	-	796,100
3/1/2031	1,095,000	796,100	-	1,891,100
9/1/2031	-	768,725	-	768,725
3/1/2032	1,150,000	768,725	-	1,918,725
9/1/2032	-	739,975	-	739,975
3/1/2033	1,210,000	739,975	-	1,949,975
9/1/2033	-	709,725	-	709,725
3/1/2034	1,275,000	709,725	-	1,984,725
9/1/2034	-	677,850	-	677,850
3/1/2035	1,340,000	677,850	-	2,017,850
9/1/2035	-	644,350	-	644,350
3/1/2036	1,405,000	644,350	-	2,049,350
9/1/2036	-	609,225	-	609,225
3/1/2037	1,480,000	609,225	-	2,089,225
9/1/2037	-	572,225	-	572,225
3/1/2038	1,555,000	572,225	-	2,127,225
9/1/2038	-	533,350	-	533,350
3/1/2039	1,635,000	533,350	-	2,168,350
9/1/2039	-	492,475	-	492,475
3/1/2040	1,720,000	492,475	-	2,212,475
9/1/2040	-	449,475	-	449,475
3/1/2041	1,795,000	449,475	-	2,244,475
9/1/2041	-	413,575	-	413,575
3/1/2042	1,870,000	413,575	-	2,283,575
9/1/2042	-	376,175	-	376,175
3/1/2043	1,945,000	376,175	-	2,321,175
9/1/2043	-	337,275	-	337,275
3/1/2044	2,025,000	337,275	-	2,362,275
9/1/2044	-	296,775	-	296,775
3/1/2045	2,110,000	296,775	-	2,406,775
9/1/2045	-	254,575	-	254,575
3/1/2046	2,195,000	254,575	-	2,449,575
9/1/2046	-	207,931	-	207,931
3/1/2047	2,295,000	207,931	-	2,502,931
9/1/2047	-	159,163	-	159,163
3/1/2048	2,390,000	159,163	-	2,549,163
9/1/2048	-	108,375	-	108,375
3/1/2049	2,495,000	108,375	-	2,603,375
9/1/2049	-	55,356	-	55,356
3/1/2050	2,605,000	55,356	-	2,660,356

# Plan of Finance (County)



# Plan of Finance (Hospital)

- If the County included \$10 million in its 8% GO Bond for the Hospital's requested projects, the estimated debt service for that portion of the borrowing would be approximately \$680,000 per year assuming a 20-year term repayment term.
- The \$200,000 of surplus revenue generated in FY2024 due to reassessment plus the additional revenue generated from an increase in the millage rate for the Hospital of 0.2 mills of \$540,000 would be sufficient to service the debt on this portion of the borrowing and the County would maintain ample 8% debt capacity.

Calendar Year	Millage Revenue Available	Proposed Debt Service	Coverage	Surplus (Deficit)	<b>8% Assessed Value Capacity</b>	
2025	740,000	673,824	1.10x	66,176	Assessed Value	2,654,721,069
2026	740,000	680,200	1.09x	59,800	x 8%	8.00%
2027	740,000	681,325	1.09x	58,675	Debt Limit	212,377,686
2028	740,000	681,700	1.09x	58,300	Less: Existing 8% GO Debt	(57,352,954)
2029	740,000	681,325	1.09x	58,675	<b>Existing 8% Debt Limit</b>	<b>155,024,732</b>
2030	740,000	680,200	1.09x	59,800	Less: County GO	(52,820,000)
2031	740,000	678,325	1.09x	61,675	Less: Hospital GO	(10,075,000)
2032	740,000	680,575	1.09x	59,425	Less: UCSB GO	-
2033	740,000	676,950	1.09x	63,050	Less: TCL GO	
2034	740,000	677,450	1.09x	62,550	<b>Remaining 8% Debt Limit</b>	<b>92,129,732</b>
2035	740,000	681,825	1.09x	58,175		
2036	740,000	680,075	1.09x	59,925		
2037	740,000	677,325	1.09x	62,675		
2038	740,000	678,450	1.09x	61,550		
2039	740,000	678,325	1.09x	61,675		
2040	740,000	681,825	1.09x	58,175		
2041	740,000	681,800	1.09x	58,200		
2042	740,000	678,600	1.09x	61,400		
2043	740,000	679,500	1.09x	60,500		
2044	740,000	679,400	1.09x	60,600		
2045	740,000	678,300	1.09x	61,700		
Total		14,267,299				



# Plan of Finance (TCL)

- If the County included \$6 million in its 8% GO Bond for TCL's requested projects, the estimated debt service for that portion of the borrowing would be approximately \$408,000 per year assuming a 20-year repayment term.
- The \$200,000 of surplus revenue generated in FY2024 due to reassessment plus the additional revenue generated from an increase in the millage rate for TCL of 0.1 mills of \$270,000 would be sufficient to service the debt on this portion of the borrowing and the County would maintain ample 8% debt capacity.

Calendar Year	Millage Revenue Available	Proposed Debt Service	Coverage	Surplus (Deficit)
2025	470,000	406,605	1.16x	63,395
2026	470,000	406,250	1.16x	63,750
2027	470,000	408,000	1.15x	62,000
2028	470,000	409,250	1.15x	60,750
2029	470,000	410,000	1.15x	60,000
2030	470,000	405,375	1.16x	64,625
2031	470,000	410,250	1.15x	59,750
2032	470,000	409,500	1.15x	60,500
2033	470,000	408,250	1.15x	61,750
2034	470,000	406,500	1.16x	63,500
2035	470,000	409,125	1.15x	60,875
2036	470,000	406,125	1.16x	63,875
2037	470,000	407,500	1.15x	62,500
2038	470,000	408,125	1.15x	61,875
2039	470,000	408,000	1.15x	62,000
2040	470,000	407,125	1.15x	62,875
2041	470,000	407,200	1.15x	62,800
2042	470,000	408,300	1.15x	61,700
2043	470,000	408,800	1.15x	61,200
2044	470,000	408,700	1.15x	61,300
2045	470,000	408,000	1.15x	62,000
Total		8,566,980		

8% Assessed Value Capacity	
Assessed Value	2,654,721,069
x 8%	8.00%
<i>Debt Limit</i>	212,377,686
Less: Existing 8% GO Debt	(57,352,954)
<b>Existing 8% Debt Limit</b>	<b>155,024,732</b>
Less: County GO	(52,820,000)
Less: Hospital GO	(10,075,000)
Less: UCSB GO	-
Less: TCL GO	(6,050,000)
<b>Remaining 8% Debt Limit</b>	<b>86,079,732</b>

# Financing Schedule

DATE	TASK
By June 5	Distribute Draft of Bond Ordinance
June 10	Comments Due on Bond Ordinance
June 12	Distribute Revised Draft of Bond Ordinance
By September 13	Finalize Bond Ordinance / Plan of Finance
September 23	Finance Committee Meeting – Review Plan of Finance / Bond Ordinance
October 14	County Council Meeting – 1 <sup>st</sup> Reading of Bond Ordinance
By October 25	Publish Notice of Public Hearing
October 28	County Council Meeting – 2 <sup>nd</sup> Reading of Bond Ordinance
November 7	Distribute Draft of POS
Week of November 11	Working Group Call to Review POS
November 12	County Council Meeting – Public Hearing; 3 <sup>rd</sup> Reading of Bond Ordinance
December 6	Distribute Revised Draft of POS Send Documents to Rating Agencies
By December 9	Distribute Draft of Rating Presentation
Week of December 9	Working Group Call to Review POS / Rating Presentation
Week of December 16	Rating Agency Calls
By December 31	Distribute Revised Draft of POS
By January 6	Receive Ratings
January 9	Finalize POS
January 10	Post POS
January 11	60-Day Challenge Period Expires
By January 14	Publish Summary Notice of Sale
January 21	Sell Bonds
Week of January 27	Distribute Draft of Closing Documents
February 6	Closing

# First Tryon Advisors

SIMPLIFYING PUBLIC FINANCE

FIRSTTRYON.COM

MSRB Registrant

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**FINANCING SCHEDULE**

Sep-24							Oct-24							Nov-24						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7			1	2	3	4	5						1	2
8	9	10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9
15	16	17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16
22	23	24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23
29	30						27	28	29	30	31			24	25	26	27	28	29	30

Dec-24							Jan-25							Feb-25						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7				1	2	3	4							1
8	9	10	11	12	13	14	5	6	7	8	9	10	11	2	3	4	5	6	7	8
15	16	17	18	19	20	21	12	13	14	15	16	17	18	9	10	11	12	13	14	15
22	23	24	25	26	27	28	19	20	21	22	23	24	25	16	17	18	19	20	21	22
29	30	31					26	27	28	29	30	31		23	24	25	26	27	28	

DATE	TASK	RESPONSIBILITY
By June 5	Distribute Draft of Bond Ordinance	BC
June 10	Comments Due on Bond Ordinance	Working Group
June 12	Distribute Revised Draft of Bond Ordinance	BC
By September 13	Finalize Bond Ordinance / Plan of Finance	Working Group
September 23	Finance Committee Meeting – Review Plan of Finance / Bond Ordinance	County / BC
October 14	County Council Meeting – 1 <sup>st</sup> Reading of Bond Ordinance	County / BC
By October 25	Publish Notice of Public Hearing	County / BC
October 28	County Council Meeting – 2 <sup>nd</sup> Reading of Bond Ordinance	County / BC
November 7	Distribute Draft of POS	BC
Week of November 11	Working Group Call to Review POS	Working Group
November 12	County Council Meeting – Public Hearing; 3 <sup>rd</sup> Reading of Bond Ordinance	County / BC
December 6	Distribute Revised Draft of POS Send Documents to Rating Agencies	BC FA
By December 9	Distribute Draft of Rating Presentation	FA
Week of December 9	Working Group Call to Review POS / Rating Presentation	Working Group
Week of December 16	Rating Agency Calls	Working Group
By December 31	Distribute Revised Draft of POS	BC
By January 6	Receive Ratings	Working Group
January 9	Finalize POS	Working Group
January 10	Post POS	BC
January 11	60-Day Challenge Period Expires	Working Group
By January 14	Publish Summary Notice of Sale	BC
January 21	Sell Bonds	Working Group
Week of January 27	Distribute Draft of Closing Documents	BC
February 6	Closing	Working Group

\*County Council typically meets on the 2<sup>nd</sup> and 4<sup>th</sup> Monday of each month

**RESPONSIBILITY LEGEND:***Item 9.*

<b>Role</b>	<b>Entity</b>	<b>Defined</b>
Issuer	Beaufort County, South Carolina	"County"
Bond Counsel	Haynsworth Sinkler Boyd	"BC"
Financial Advisor	First Tryon Advisors	"FA"



# BEAUFORT COUNTY COUNCIL

## AGENDA ITEM SUMMARY

Item 10.

<b>ITEM TITLE:</b>
<i>RECOMMEND APPROVAL OF AN ORDINANCE AMENDING THE COMMUNITY DEVELOPMENT CODE (CDC): SECTION 3.1.60 (CONSOLIDATED USE TABLE), 3.3.40 (COMMUNITY CENTER MIXED USE (C4) ZONE STANDARDS), AND 3.3.50 (REGIONAL CENTER MIXED USE (C5) ZONE STANDARDS) TO ALLOW DWELLING: SINGLE FAMILY DETACHED UNIT IN C4 NEIGHBORHOOD MIXED USE AND C5 REGIONAL CENTER MIXED USE</i>
<b>MEETING NAME AND DATE:</b>
<i>Community Services and Land Use Committee Meeting, September 9, 2024</i>
<b>PRESENTER INFORMATION:</b>
<i>Robert Merchant, AICP, Director, Beaufort County Planning and Zoning (10 minutes needed for item discussion)</i>
<b>ITEM BACKGROUND:</b>
<i>This text amendment application went before the Beaufort County Planning Commission at their July 1, 2024, meeting. At that time, the Commission voted 4-3 to recommend approval of the proposed amendment to County Council. The same motion also recommended approval of applying the use to zoning district Community Center Mixed Use (C4). Therefore, the ordinance reflects the recommendation from staff and the Planning Commission.</i>
<b>PROJECT / ITEM NARRATIVE:</b>
<i>The applicant is seeking to amend the Community Development Code (CDC) to allow the use of Single Family Detached Unit in the C5 district because many properties zoned C5 are non-conforming and/or are platted purposefully to hold single-family homes.</i>
<b>FISCAL IMPACT:</b>
<i>Not applicable</i>
<b>STAFF RECOMMENDATIONS TO COUNCIL:</b>
<i>The text amendment helps further equity and promotes affordable housing. Staff recommends approval and encourages that zoning district C4 also adopts the amendment to continue further consistency.</i>
<b>OPTIONS FOR COUNCIL MOTION:</b>
<i>Motion to approve, modify, or deny the application as submitted.*  *Council's decision must be based on the standards in Section 7.3.30 C of the Community Development Code (Attachment A to this AIS) and must clearly state the factors considered in making its decision and the basis or rationale for the decision. (7.4.90 B.3). These factors are as follows:</i> <ol style="list-style-type: none"><li><i>1. Is consistent with the goals, objectives, and policies of the Comprehensive Plan;</i></li><li><i>2. Is not in conflict with any provision of this Development Code or the Code of Ordinances;</i></li><li><i>3. Is required by changed conditions;</i></li><li><i>4. Addresses a demonstrated community need;</i></li><li><i>5. Is consistent with the purpose and intent of the zones in this Development Code, or would improve compatibility among uses and ensure efficient development within the County;</i></li><li><i>6. Would result in a logical and orderly development pattern; and</i></li></ol>

7. *Would not result in adverse impacts on the natural environment, including but not limited to water, air, noise, stormwater management, wildlife, vegetation, wetlands, and the natural functioning of the environment.*

### **Attachment A.**

**CDC Section 7.3.30 B.7 Text Amendments** provides:

The County Council's decision shall be based on the standards in Subsection 7.3.30.C.

**CDC Section 7.3.30 Code Text Amendment Review Standards.**

The advisability of amending the text of this Development Code is a matter committed to the legislative discretion of the County Council and is not controlled by any one factor. In determining whether to adopt or deny the proposed text amendment, the County Council shall weigh the relevance of and consider whether, and the extent to which, the proposed amendment:

1. Is consistent with the goals, objectives, and policies of the Comprehensive Plan;
2. Is not in conflict with any provision of this Development Code or the Code of Ordinances;
3. Is required by changed conditions;
4. Addresses a demonstrated community need;
5. Is consistent with the purpose and intent of the zones in this Development Code, or would improve compatibility among uses and ensure efficient development within the County;
6. Would result in a logical and orderly development pattern; and
7. Would not result in adverse impacts on the natural environment, including but not limited to water, air, noise, stormwater management, wildlife, vegetation, wetlands, and the natural functioning of the environment.

**CDC Section 7.4.90 B.3** provides:

County Council's decision shall clearly state the factors considered in making the decision and the basis or rationale for the decision.

## TEXT AMENDMENT REQUESTS

I MOVE THAT WE GRANT/(DENY) THE REQUEST FOR THE TEXT AMENDMENT FOR THE FOLLOWING REASONS (**STATE ALL THAT SUPPORT YOUR MOTION**).

### THE REQUEST:

1. IS/ (IS NOT) CONSISTENT WITH THE GOALS, OBJECTIVES, AND POLICIES OF THE COMPREHENSIVE PLAN; \_\_\_\_\_
2. IS NOT/ (IS) IN CONFLICT WITH ANY PROVISION OF THIS DEVELOPMENT CODE OR THE CODE OF ORDINANCES; \_\_\_\_\_
3. IS/ (IS NOT) REQUIRED BY CHANGED CONDITIONS; \_\_\_\_\_
4. DOES/ (DOES NOT) ADDRESS A DEMONSTRATED COMMUNITY NEED; \_\_\_\_\_
5. IS/ (IS NOT) CONSISTENT WITH THE PURPOSE AND INTENT OF THE ZONES IN THIS DEVELOPMENT CODE, OR WOULD IMPROVE COMPATIBILITY AMONG USES AND ENSURE EFFICIENT DEVELOPMENT WITHIN THE COUNTY; \_\_\_\_\_
6. WOULD/ (WOULD NOT) RESULT IN A LOGICAL AND ORDERLY DEVELOPMENT PATTERN; \_\_\_\_\_
7. WOULD NOT/ (WOULD) RESULT IN ADVERSE IMPACTS ON THE NATURAL ENVIRONMENT INCLUDING BUT NOT LIMITED TO WATER, AIR, NOISE, STORMWATER MANAGEMENT, WILDLIFE, VEGETATION, WETLANDS, AND THE NATURAL FUNCTIONING OF THE ENVIRONMENT. \_\_\_\_\_





## MEMORANDUM

**TO:** Alice Howard, Chair, Community Services and Land Use Committee of County Council

**FROM:** Robert Merchant, AICP, Beaufort County Planning and Zoning Department

**DATE:** July 5, 2024

**SUBJECT:** CONSIDERATION OF AN ORDINANCE AMENDING THE COMMUNITY DEVELOPMENT CODE (CDC): SECTION 3.1.60 (CONSOLIDATED USE TABLE), 3.3.40 (COMMUNITY CENTER MIXED USE (C4) ZONE STANDARDS), AND 3.3.50 (REGIONAL CENTER MIXED USE (C5) ZONE STANDARDS) TO ALLOW DWELLING: SINGLE FAMILY DETACHED UNIT IN C4 NEIGHBORHOOD MIXED USE AND C5 REGIONAL CENTER MIXED USE

### STAFF REPORT:

#### A. BACKGROUND:

**Case No.** CDPA-000038-2024

**Applicant:** Rhonda W Bryan

**Proposed Amendment:** Amendment to Sections 3.1.60 and 3.3.50 of the Community Development Code

#### B. SUMMARY AND BACKGROUND:

The proposed amendment seeks to permit single-family residences within the C5 Regional Center Mixed Use zoning district. The current standards do not allow for this use which has created nonconformities within the county- specifically North of the Broad River. The current standards allow a full range of retail, service, and office uses. The proposed standards would allow a density compatible with surrounding Single-Family residential areas.

#### C. CODE TEXT AMENDMENT REVIEW STANDARDS: In determining whether to adopt or deny the proposed text amendment, the County Council shall weigh the relevance of and consider whether, and the extent to which, the proposed amendment:

1. **Is consistent with the goals, objectives, and policies of the Comprehensive Plan;** Yes, the amendment is consistent with and furthers the goals of the Comprehensive Plan. Strategy H.1 recommends to “develop policies for the appropriate location and quality of affordable housing.” A crucial aspect of affordability involves promoting infill development which is attainable through this amendment. Additionally, the Built

Environment Core Value #4 emphasizes the ability for landowners to profit from their land. Presently, numerous C5 properties are designated as non-conforming and feature small-lot patterns. The inability to build single-family homes on these lots diminishes equity by restricting property owners' choices and investment potential.

**2. Is not in conflict with any provision of this Development Code or the Code of Ordinances;**

No, it is not in conflict. However, to continue further consistency, it is recommended that zoning district Community Center Mixed Use (C4) is also amended to allow single-family detached dwelling units as well.

**3. Is required by changed conditions;**

No, it is not.

**4. Addresses a demonstrated community need;**

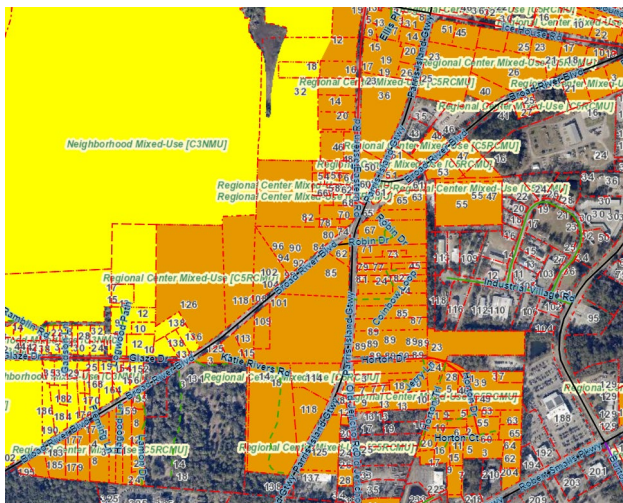
Yes, many properties zoned C5 are non-conforming and/or are platted purposefully to hold single-family homes. There exists a small lot pattern curated of low-density housing that needs to be considered conforming.

**5. Is consistent with the purpose and intent of the zones in this Development Code, or would improve compatibility among uses and ensure efficient development within the County;**

Yes, the Regional Center Mixed Use (C5) zoning district's purpose is to contain mixed uses; adding single family detached dwelling units furthers this purpose.

**6. Would result in a logical and orderly development pattern; and**

Yes, this would allow particular neighborhood compatible development – particularly along Parris Island Gateway.



It's essential to recognize that the market will not sustain expansive traditional single-family neighborhoods with 2.6 units per acre on extensive tracts along major roads.

**7. Would not result in adverse impacts on the natural environment, including but not limited to water, air, noise, stormwater management, wildlife, vegetation, wetlands, and the natural functioning of the environment.**

Yes, it would not result in adverse impacts. Any development on the site would be required to adhere to the natural resource protection, tree protection, wetland protection, and stormwater standards in the Community Development Code and the Stormwater BMP Manual.

**D. STAFF RECOMMENDATION:** Staff recommends approval.

**E. PLANNING COMMISSION RECOMMENDATION:** This text amendment went before the Beaufort County Planning Commission at their July 1, 2024 meeting. At that time, the Commission voted 4-3 to recommend approval of the proposed amendment along with recommending that zoning district C4 also adopt Single Family Detached Unit as a permitted use to County Council.

**F. ATTACHMENTS:**

- Text Amendment Changes

## 3.1.60 - Consolidated Use Table

Table 3.1.60: Consolidated Use Table																			
	Land Use Type	T 1 N	T2 R	T 2 R L	T2 R N	T2 R N O	T2 R C	T3 E	T3 H N	T 3 N	T3 N O	T4 H C	T4 V C	T4 H C O	T4 N C	C3	C4	C5	SI
AGRICULTURE																			
1.	Agriculture & Crop Harvesting	P	P	P	P	P	P	P	—	—	—	—	—	—	—	P	—	—	—
2.	Aquaponics	S	S	S	S	S	S	S								S			
3.	Agricultural Support Services	—	P	P	P	P	P	—	—	—	—	P	P	P	—	TC P	P	P	P
4.	Animal Production	—	C	—	C	C	C	—	—	—	—	—	—	—	—	—	—	—	—
5.	Animal Production: Factory Farming	—	S	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
6.	Seasonal Farmworker Housing	—	C	C	C	C	C	C	—	—	—	—	—	—	—	C	—	—	—
7.	Forestry	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P
8.	Commercial Stables	—	C	C	C	C	C	—	—	—	—	—	—	—	—	C	—	—	—
RESIDENTIAL																			
1.	Dwelling: Single Family Detached Unit	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	TC P P	TC P P	—

### 3.3.40 - Community Center Mixed Use (C4) Zone Standards

<b>A. Purpose</b>	
The Community Center Mixed Use (C4) Zone provides for a limited number of retail, service, and office uses intended to serve the surrounding neighborhood.	
These are smaller uses and not highway service types of uses. The intensity standards are set to ensure that the uses have the same suburban character as the surrounding suburban residential areas. They are intended to blend with the surrounding areas, not threaten the character of the area. This Zone shall not consist of strip developments but rather neighborhood centers with a sense of place.	
<b>B. Building Placement</b>	
<b>Setback (Distance from ROW/Property Line)</b>	
Front	20' min.
Side:	
Side, Main Building	10' min.
Side, Ancillary Building	10' min.
Rear	15' min.
<b>Lot Size</b>	
Lot Size	5,000 SF min.
Width	50' min.
<b>Minimum Site Area</b>	
Single-Family and Duplex	5,000 SF
Multi-Family	21,780 SF
<b>Note:</b>	
For development within a Traditional Community Plan meeting the requirements of Division 2.3, setback, minimum lot size and minimum site area requirements of the transect zone established and delineated on the regulating plan shall apply.	
<b>C. Building Form</b>	
<b>Building Height</b>	

Single-Family and Duplex	2.5 stories max.
Multi-Family	3 stories max.
Non-Residential Buildings	2 stories max.
Ground Floor Finish Level	No minimum
<b>D. Gross Density <sup>1</sup> and Floor Area Ratio</b>	
Gross Density	12 d.u./acre max.
Floor Area Ratio <sup>2</sup>	0.23 max.
<sup>1</sup> Gross Density is the total number of dwelling units on a site divided by the Base Site Area (Division 6.1.40.F).	
<sup>2</sup> Requirement applies to non-residential buildings.	
<b>E. Parking</b>	
For parking space requirements see Table 5.5.40.B (Parking Space Requirements).	

## F. C4 Allowed Uses

Land Use Type <sup>1</sup>	Specific Use Regulations	C4
<b>Agriculture</b>		
Agricultural Support Services		P
Forestry		P
<b>Residential</b>		
Dwelling: Single-Family Detached Unit	<del>2.3</del>	<del>TCP</del> P
Dwelling: Single-Family Attached Unit	2.3	TCP

### 3.3.50 - Regional Center Mixed Use (C5) Zone Standards

<b>A. Purpose</b>	
<p>The Regional Center Mixed Use (C5) Zone permits a full range of retail, service, and office uses. The Zone's intensity accommodates regional and community commercial and business activities. Uses include large, commercial activities that serve the entire County and highway-oriented businesses that need to be located on major highways. While this use intends high-quality, commercial character, the setback or build-to-line, landscaping and other design requirements provide a uniform streetscape that makes provision for pedestrian and transit access. The Zone is intended to be more attractive than commercial areas in other counties to maintain the attractive tourist and business environment and have minimal impact on surrounding residential areas.</p> <p>The Zone is not intended to be a strip along all arterials and collectors. In developing areas, the minimum depth of a parcel along an arterial or collector shall be 600'. The minimum zone size shall be 20 acres. In the older, built-up areas, new uses shall have depths and areas equal to or greater than similar uses in the area. This Zone shall be located in areas designated "regional commercial" in the Comprehensive Plan.</p>	
<b>B. Building Placement</b>	
<b>Setback (Distance from ROW/Property Line)</b>	
Front	25' min.
Side:	
Side, Main Building	15' min.
Side, Ancillary Building	15' min.
Rear	10' min.
<b>Lot Size</b>	
<b>Single-Family Detached</b>	<b>5,000 SF min.</b>
<b>Lot Size All Other Uses</b>	21,780 SF min.
Width	150' min.
<b>Note:</b>	
For development within a Traditional Community Plan meeting the requirements of Division 2.3, setback, minimum lot size and minimum site area requirements of the transect zone established and delineated on the regulating plan shall apply.	
<b>C. Building Form</b>	
<b>Building Height</b>	

Single-Family Detached	2.5 stories max
<del>All Buildings</del> All Other Buildings	3 stories max.
Ground Floor Finish Level	No minimum
D. Gross Density <sup>1</sup> and Floor Area Ratio	
Density	15.0 d.u./acre max. <sup>2</sup>
Floor Area Ratio <sup>3</sup>	0.37 max.
<sup>1</sup> Gross Density is the total number of dwelling units on a site divided by the Base Site Area (Division 6.1.40.F).	
<sup>2</sup> See Section 4.1.350 for Affordable Housing density bonuses.	
<sup>3</sup> Requirement applies to non-residential buildings.	
E. Parking	
For parking space requirements see Table 5.5.40.B (Parking Space Requirements).	

## F. C5 Allowed Uses

Land Use Type <sup>1</sup>	Specific Use Regulations	C5
Agriculture		
Agricultural Support Services		P
Forestry		P
Residential		
Dwelling: Single-Family Detached Unit	2.3	TCP P
Dwelling: Single-Family Attached Unit	2.3	TCP



**ORDINANCE 2024/\_\_\_\_\_**

**AN ORDINANCE AMENDING THE COMMUNITY DEVELOPMENT CODE (CDC): SECTION 3.1.60 (CONSOLIDATED USE TABLE), 3.3.40 (COMMUNITY CENTER MIXED USE (C4) ZONE STANDARDS), AND 3.3.50 (REGIONAL CENTER MIXED USE (C5) ZONE STANDARDS) TO ALLOW DWELLING: SINGLE FAMILY DETACHED UNIT IN C4 NEIGHBORHOOD MIXED USE AND C5 REGIONAL CENTER MIXED USE**

**WHEREAS**, the Regional Center Mixed Use (C5) zoning district does not permit single family detached units unless in a Traditional Community Plan; and

**WHEREAS**, a landowner has requested to permit single family detached units in C5; and

**WHEREAS**, the Planning Department has proposed this amendment to allow density compatible with surrounding Single-Family residential areas; and

**WHEREAS**, the Beaufort County Comprehensive Plan recommends to “develop policies for the appropriate location and quality of affordable housing” and emphasizes the ability for landowners to profit from their land; and

**WHEREAS**, the Beaufort County Planning Commission considered the request on July 1, 2024, voting 4-3 to recommend that County Council approve the request along with the recommendation that the changes also be applied to Community Center Mixed Use (C4) zoning district; and

**WHEREAS**, County Council now wishes to amend the Community Development Code (CDC) to permit single family detached units to Community Center Mixed Use (C4) and Regional Center Mixed Use (C5) zoning districts.

**NOW, THEREFORE** be it ordained by County Council in a meeting duly assembled as follows:

The Community Development Code is hereby amended to permit the use of Single Family Detached Unit to Community Center Mixed Use (C4) and Regional Center Mixed Use (C5) zoning districts. Sections 3.1.60, 3.3.40, and 3.3.50 of the Community Development Code are hereby amended to reflect the language depicted in Exhibit A.

Ordained this \_\_\_\_ day of \_\_\_\_\_, 2024

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Joseph Passiment, Chairman

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Sarah Brock, Clerk to Council

## 3.1.60 - Consolidated Use Table

Table 3.1.60: Consolidated Use Table																			
	Land Use Type	T 1 N	T2 R	T 2 R L	T2 R N	T2 R N O	T2 R C	T3 E	T3 H N	T 3 N	T3 N O	T4 H C	T4 V C	T4 H C O	T4 N C	C3	C4	C5	SI
AGRICULTURE																			
1.	Agriculture & Crop Harvesting	P	P	P	P	P	P	P	—	—	—	—	—	—	—	P	—	—	—
2.	Aquaponics	S	S	S	S	S	S	S								S			
3.	Agricultural Support Services	—	P	P	P	P	P	—	—	—	—	P	P	P	—	TC P	P	P	P
4.	Animal Production	—	C	—	C	C	C	—	—	—	—	—	—	—	—	—	—	—	—
5.	Animal Production: Factory Farming	—	S	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
6.	Seasonal Farmworker Housing	—	C	C	C	C	C	C	—	—	—	—	—	—	—	C	—	—	—
7.	Forestry	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P
8.	Commercial Stables	—	C	C	C	C	C	—	—	—	—	—	—	—	—	C	—	—	—
RESIDENTIAL																			
1.	Dwelling: Single Family Detached Unit	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	TC P P	TC P P	—

### 3.3.40 - Community Center Mixed Use (C4) Zone Standards

<b>A. Purpose</b>	
The Community Center Mixed Use (C4) Zone provides for a limited number of retail, service, and office uses intended to serve the surrounding neighborhood.	
These are smaller uses and not highway service types of uses. The intensity standards are set to ensure that the uses have the same suburban character as the surrounding suburban residential areas. They are intended to blend with the surrounding areas, not threaten the character of the area. This Zone shall not consist of strip developments but rather neighborhood centers with a sense of place.	
<b>B. Building Placement</b>	
<b>Setback (Distance from ROW/Property Line)</b>	
Front	20' min.
Side:	
Side, Main Building	10' min.
Side, Ancillary Building	10' min.
Rear	15' min.
<b>Lot Size</b>	
Lot Size	5,000 SF min.
Width	50' min.
<b>Minimum Site Area</b>	
Single-Family and Duplex	5,000 SF
Multi-Family	21,780 SF
<b>Note:</b>	
For development within a Traditional Community Plan meeting the requirements of Division 2.3, setback, minimum lot size and minimum site area requirements of the transect zone established and delineated on the regulating plan shall apply.	
<b>C. Building Form</b>	
<b>Building Height</b>	

Single-Family and Duplex	2.5 stories max.
Multi-Family	3 stories max.
Non-Residential Buildings	2 stories max.
Ground Floor Finish Level	No minimum
<b>D. Gross Density <sup>1</sup> and Floor Area Ratio</b>	
Gross Density	12 d.u./acre max.
Floor Area Ratio <sup>2</sup>	0.23 max.
<sup>1</sup> Gross Density is the total number of dwelling units on a site divided by the Base Site Area (Division 6.1.40.F).	
<sup>2</sup> Requirement applies to non-residential buildings.	
<b>E. Parking</b>	
For parking space requirements see Table 5.5.40.B (Parking Space Requirements).	

## F. C4 Allowed Uses

Land Use Type <sup>1</sup>	Specific Use Regulations	C4
<b>Agriculture</b>		
Agricultural Support Services		P
Forestry		P
<b>Residential</b>		
Dwelling: Single-Family Detached Unit	<del>2.3</del>	<del>TCP</del> P
Dwelling: Single-Family Attached Unit	2.3	TCP

### 3.3.50 - Regional Center Mixed Use (C5) Zone Standards

A. Purpose	
<p>The Regional Center Mixed Use (C5) Zone permits a full range of retail, service, and office uses. The Zone's intensity accommodates regional and community commercial and business activities. Uses include large, commercial activities that serve the entire County and highway-oriented businesses that need to be located on major highways. While this use intends high-quality, commercial character, the setback or build-to-line, landscaping and other design requirements provide a uniform streetscape that makes provision for pedestrian and transit access. The Zone is intended to be more attractive than commercial areas in other counties to maintain the attractive tourist and business environment and have minimal impact on surrounding residential areas.</p> <p>The Zone is not intended to be a strip along all arterials and collectors. In developing areas, the minimum depth of a parcel along an arterial or collector shall be 600'. The minimum zone size shall be 20 acres. In the older, built-up areas, new uses shall have depths and areas equal to or greater than similar uses in the area. This Zone shall be located in areas designated "regional commercial" in the Comprehensive Plan.</p>	
B. Building Placement	
Setback (Distance from ROW/Property Line)	
Front	25' min.
Side:	
Side, Main Building	15' min.
Side, Ancillary Building	15' min.
Rear	10' min.
Lot Size	
Single-Family Detached	5,000 SF min.
Lot Size All Other Uses	21,780 SF min.
Width	150' min.
Note:	
For development within a Traditional Community Plan meeting the requirements of Division 2.3, setback, minimum lot size and minimum site area requirements of the transect zone established and delineated on the regulating plan shall apply.	
C. Building Form	
Building Height	

Single-Family Detached	2.5 stories max
<del>All Buildings</del> All Other Buildings	3 stories max.
Ground Floor Finish Level	No minimum
D. Gross Density <sup>1</sup> and Floor Area Ratio	
Density	15.0 d.u./acre max. <sup>2</sup>
Floor Area Ratio <sup>3</sup>	0.37 max.
<sup>1</sup> Gross Density is the total number of dwelling units on a site divided by the Base Site Area (Division 6.1.40.F).	
<sup>2</sup> See Section 4.1.350 for Affordable Housing density bonuses.	
<sup>3</sup> Requirement applies to non-residential buildings.	
E. Parking	
For parking space requirements see Table 5.5.40.B (Parking Space Requirements).	

## F. C5 Allowed Uses

Land Use Type <sup>1</sup>	Specific Use Regulations	C5
Agriculture		
Agricultural Support Services		P
Forestry		P
Residential		
Dwelling: Single-Family Detached Unit	2.3	TCP P
Dwelling: Single-Family Attached Unit	2.3	TCP



# BEAUFORT COUNTY COUNCIL

## AGENDA ITEM SUMMARY

Item 11.

### ITEM TITLE:

*TEXT AMENDMENT TO ARTICLE 1 (GENERAL PROVISIONS), DIVISION 1.3 (APPLICABILITY AND JURISDICTION), SECTION 1.3.50 (EXEMPTIONS) OF THE COMMUNITY DEVELOPMENT CODE (CDC) TO PROVIDE EXEMPTIONS TO ADDRESS COUNTY PUBLIC SERVICES USES*

### MEETING NAME AND DATE:

*Community Services and Land Use Committee Meeting, September 9, 2024*

### PRESENTER INFORMATION:

*Robert Merchant, AICP, Director, Beaufort County Planning and Zoning*

*(10 minutes needed for item discussion)*

### ITEM BACKGROUND:

*In 2020, the County adopted the provision that provided exemption for public service uses to allow the County to provide necessary services in any zoning district. To provide more oversight, this amendment to the provision would require an additional public hearing before the Planning Commission .*

### PROJECT / ITEM NARRATIVE:

*Beaufort County Staff is requesting an amendment to Section 1.3.50 of the Community Development Code (CDC) to provide more oversight and public input into an exemption for Public Service Uses.*

### FISCAL IMPACT:

*Not applicable*

### STAFF RECOMMENDATIONS TO COUNCIL:

*Staff recommends approval.*

### OPTIONS FOR COUNCIL MOTION:

*Motion to approve, modify, or deny the application as submitted.\**

*\*Council's decision must be based on the standards in Section 7.3.30 C of the Community Development Code (Attachment A to this AIS) and must clearly state the factors considered in making its decision and the basis or rationale for the decision. (7.4.90 B.3). These factors are as follows:*

- 1. Is consistent with the goals, objectives, and policies of the Comprehensive Plan;*
- 2. Is not in conflict with any provision of this Development Code or the Code of Ordinances;*
- 3. Is required by changed conditions;*
- 4. Addresses a demonstrated community need;*
- 5. Is consistent with the purpose and intent of the zones in this Development Code, or would improve compatibility among uses and ensure efficient development within the County;*
- 6. Would result in a logical and orderly development pattern; and*
- 7. Would not result in adverse impacts on the natural environment, including but not limited to water, air, noise, stormwater management, wildlife, vegetation, wetlands, and the natural functioning of the environment.*



**Attachment A.****CDC Section 7.3.30 B.7 Text Amendment** provides:

The County Council's decision shall be based on the standards in Subsection 7.3.30.C.

**CDC Section 7.3.30 Code Text Amendment Review Standards.**

The advisability of amending the text of this Development Code is a matter committed to the legislative discretion of the County Council and is not controlled by any one factor. In determining whether to adopt or deny the proposed text amendment, the County Council shall weigh the relevance of and consider whether, and the extent to which, the proposed amendment:

1. Is consistent with the goals, objectives, and policies of the Comprehensive Plan;
2. Is not in conflict with any provision of this Development Code or the Code of Ordinances;
3. Is required by changed conditions;
4. Addresses a demonstrated community need;
5. Is consistent with the purpose and intent of the zones in this Development Code, or would improve compatibility among uses and ensure efficient development within the County;
6. Would result in a logical and orderly development pattern; and
7. Would not result in adverse impacts on the natural environment, including but not limited to water, air, noise, stormwater management, wildlife, vegetation, wetlands, and the natural functioning of the environment.

**CDC Section 7.4.90 B.3** provides:

County Council's decision shall clearly state the factors considered in making the decision and the basis or rationale for the decision.

## TEXT AMENDMENT REQUESTS

I MOVE THAT WE GRANT/(DENY) THE REQUEST FOR THE TEXT AMENDMENT FOR THE FOLLOWING REASONS (**STATE ALL THAT SUPPORT YOUR MOTION**).

### THE REQUEST:

1. IS/ (IS NOT) CONSISTENT WITH THE GOALS, OBJECTIVES, AND POLICIES OF THE COMPREHENSIVE PLAN; \_\_\_\_\_
2. IS NOT/ (IS) IN CONFLICT WITH ANY PROVISION OF THIS DEVELOPMENT CODE OR THE CODE OF ORDINANCES; \_\_\_\_\_
3. IS/ (IS NOT) REQUIRED BY CHANGED CONDITIONS; \_\_\_\_\_
4. DOES/ (DOES NOT) ADDRESS A DEMONSTRATED COMMUNITY NEED; \_\_\_\_\_
5. IS/ (IS NOT) CONSISTENT WITH THE PURPOSE AND INTENT OF THE ZONES IN THIS DEVELOPMENT CODE, OR WOULD IMPROVE COMPATIBILITY AMONG USES AND ENSURE EFFICIENT DEVELOPMENT WITHIN THE COUNTY; \_\_\_\_\_
6. WOULD/ (WOULD NOT) RESULT IN A LOGICAL AND ORDERLY DEVELOPMENT PATTERN; \_\_\_\_\_
7. WOULD NOT/ (WOULD) RESULT IN ADVERSE IMPACTS ON THE NATURAL ENVIRONMENT INCLUDING BUT NOT LIMITED TO WATER, AIR, NOISE, STORMWATER MANAGEMENT, WILDLIFE, VEGETATION, WETLANDS, AND THE NATURAL FUNCTIONING OF THE ENVIRONMENT. \_\_\_\_\_



## MEMORANDUM

**TO:** Beaufort County Planning Commission

**FROM:** Robert Merchant, AICP, Beaufort County Planning and Zoning Department

**DATE:** July 15, 2024

**SUBJECT:** TEXT AMENDMENT TO ARTICLE 1 (GENERAL PROVISIONS), DIVISION 1.3 (APPLICABILITY AND JURISDICTION), SECTION 1.3.50 (EXEMPTIONS) OF THE COMMUNITY DEVELOPMENT CODE (CDC) TO PROVIDE EXEMPTIONS TO ADDRESS COUNTY PUBLIC SERVICES USES

### **STAFF REPORT:**

#### **A. BACKGROUND:**

**Case No.** CDPA-000040-2024

**Proposed Amendment:** Text Amendment to Section 1.3.50

#### **B. SUMMARY AND BACKGROUND:**

Beaufort County Staff is requesting an amendment to Section 1.3.50 of the Community Development Code (CDC) to provide more oversight and public input into an exemption for Public Service Uses. The purpose of the exemption for public service uses is to allow the County to provide necessary services in any zoning district with the requirement that the proposed use receive a public hearing before a decision by County Council. This provision was adopted by Council in 2020. This amendment would provide greater oversight and an additional public hearing by requiring public service exemptions to receive a public hearing at the Planning Commission meeting in addition to the one at County Council prior to Council action. The purpose of this amendment is to provide greater flexibility for the County government to respond to public safety and service needs throughout the County where these needs warranted, while providing additional oversight and public input into the process.

#### **C. CODE TEXT AMENDMENT REVIEW STANDARDS:** In determining whether to adopt or deny the proposed text amendment, the County Council shall weigh the relevance of and consider whether, and the extent to which, the proposed amendment:

1. **Is consistent with the goals, objectives, and policies of the Comprehensive Plan;**

Yes, the Comprehensive Plan's Capital Improvement Plan outlines county facility needs that could be assisted through this amendment.

**2. Is not in conflict with any provision of this Development Code or the Code of Ordinances.**

No, this sets a provision that would allow county service needs to locate on properties that may not otherwise be allowed. Its purpose is to make sure that there are not conflicts with any provisions when constructing needed public facilities.

**3. Is required by changed conditions;**

Yes, as the County grows, available land for public facilities becomes more difficult to acquire.

**4. Addresses a demonstrated community need;**

Yes, see 1.

**5. Is consistent with the purpose and intent of the zones in this Development Code, or would improve compatibility among uses and ensure efficient development within the County;**

No, it would not improve compatibility with uses allowed in particular zoning districts. However, the procedure added into this amendment still gives County Council ability to approve or deny any project utilizing this amendment taking into account contiguous uses.

**6. Would result in a logical and orderly development pattern; and**

See 5.

**7. Would not result in adverse impacts on the natural environment, including but not limited to water, air, noise, stormwater management, wildlife, vegetation, wetlands, and the natural functioning of the environment.**

Yes, it would not result in adverse impacts. Any development on the site would be required to adhere to the natural resource protection, tree protection, wetland protection, and stormwater standards in the Community Development Code and the Stormwater BMP Manual.

**D. RECOMMENDATION:** Staff recommends approval.

**E. ATTACHMENTS:**

- Text Amendment Changes

### 1.3.50 - Exemptions

- A. The provisions of this Development Code shall not require formal subdivision of land as a result of actions taken by the State of South Carolina and its political subdivisions to acquire land or interests in land for public right-of-way and easements.
- B. County Council, public utilities, or County agencies may be exempt from the provisions of this Development Code when an emergency exists such that it is impossible to submit to the normal procedures and standards of this Development Code and quick and instant action is necessary to secure the public health, safety, or welfare. The County Council shall ratify such exemption after the fact at its next regularly scheduled meeting, and shall base its ratification on specified findings of fact related to the emergency involved.
- C. A public utility or public infrastructure installation (water, sewer, roads, gas, stormwater, telephone, cable, etc.) is exempt from the standards of this Development Code, except:
  - 1. Thoroughfare standards, in Division 2.9 (Thoroughfare Standards);
  - 2. Wetland standards, in Section 5.11.30 (Tidal Wetlands), and Section 5.11.40 (Non-Tidal Wetlands);
  - 3. River Buffer standards, in Section 5.11.60 (River Buffer);
  - 4. Tree Protection standards, in Section 5.11.90 (Tree Protection);
  - 5. Stormwater management standards, in Section 5.12.30 (Stormwater Standards);
  - 6. Utility standards, in Section 4.1.210 (Regional (Major) Utility);
  - 7. Wireless communication facilities standards, in Section 4.1.320 (Wireless Communications Facility).
  - 8. Historic Preservation standards, in Division 5.10 (Historic Preservation).
- D. The Department of Defense shall be exempt from the standards of this Development Code.
- E. The paving of dirt roads are deemed not to constitute "development" and shall be exempt from the standards of this Development Code if the action meets one of the following conditions:
  - 1. Existing County maintained dirt roads which are improved and/or paved as part of Beaufort County's Dirt Road Paving Program as set forth in Beaufort County Policy Statement 15 and Policy Statement 17;
  - 2. Private dirt roads with adequate existing stormwater conveyance systems where the project is not related to a pending or proposed development of adjacent land, and the proposed paving meets the Thoroughfare Construction Specifications in Section 2.9.80. Private dirt roads without adequate existing stormwater conveyance systems will be required to construct a conveyance system per the County's Stormwater Best Management Practices (BMP) Manual but will not be required to meet the Effective Impervious Values in Table 5.12.30.A or provide Retention/Detention Facilities.
- F. **County public service uses.** Due to the unique nature of certain county public service uses and the need to locate these uses in certain areas of the county irrespective of prevailing zoning district regulations, Beaufort County may establish in any zoning district any public service use authorized to county government by S.C. Code §4-9-30, as amended, or any other statute or law of the State of South Carolina; provided that all public service uses meet the following requirements:
  - 1. The use shall meet the applicable requirements in Article 5 (Supplemental to Zones) of the Community Development Code.
  - 2. **Public hearing for county public service uses.** Prior to the granting of a zoning compliance for county public service uses, a site plan in accordance with standards contained herein must be submitted and approved. The Beaufort County Planning Commission will hold a public hearing on

the matter at least 15 days' notice of the time and place of which will be published in a newspaper of general circulation in Beaufort County. Notice will be given by adequately posting the properties affected, with at least one notice being visible from each public thoroughfare that abuts the property, at least 15 days prior to the public hearing. The Beaufort County Planning Commission will, after conducting the public hearing, provide a recommendation to the County Council with findings of fact regarding compliance with the Beaufort County Comprehensive Plan. Upon the Planning Commission's recommendation being received ~~and~~. The Beaufort County Council will hold a public hearing on the matter at least 15 days' notice of the time and place of which will be published in a newspaper of general circulation in Beaufort County. Notice will be given by adequately posting the properties affected, with at least one notice being visible from each public thoroughfare that abuts the property, at least 15 days prior to the public hearing. Based on the review of the planning commission's recommendation, information presented at the public hearings, and probable impact of such uses on contiguous uses and conditions, the Council may elect to deny the request in favor of a more acceptable site elsewhere, ~~approve the use or approve the use with conditions and/or restrictions.~~

( [Ord. No. 2017/20, 6-26-17](#) ; [Ord. No. 2018/7, 3-12-18](#) )

**ORDINANCE 2024/ \_\_\_\_\_****TEXT AMENDMENT TO ARTICLE 1 (GENERAL PROVISIONS), DIVISION 1.3 (APPLICABILITY AND JURISDICTION), SECTION 1.3.50 (EXEMPTIONS) OF THE COMMUNITY DEVELOPMENT CODE (CDC) TO PROVIDE EXEMPTIONS TO ADDRESS COUNTY PUBLIC SERVICES USES**

**WHEREAS**, County Council amended Section 1.3.50 (Exemptions) of the Community Development Code (CDC) to adopt Section 1.3.50.F (County public service uses) in 2020; and

**WHEREAS**, this adoption allows public service uses to be located in certain areas of the county irrespective of prevailing zoning district regulations due to unique nature of certain public service uses; and

**WHEREAS**, this adoption also stated that a public hearing before County Council is required; and

**WHEREAS**, Beaufort County Staff has requested to provide more oversight and public input but requiring public service exemptions to receive a public hearing before Planning Commission; and

**WHEREAS**, the Beaufort County Planning Commission considered the request on September 5, 2024, voting \_\_\_\_ to recommend that County Council \_\_\_\_ the request; and

**WHEREAS**, County Council now wishes to amend the Community Development Code (CDC) to require a public hearing before Planning Commission whenever Section 1.3.50. F is practiced.

**NOW, THEREFORE** be it ordained by County Council in a meeting duly assembled as follows:

The Community Development Code is hereby amended to require a public hearing before Planning Commission in the case of exempting public service uses from adhering to the prevailing zoning district regulations. Section 1.3. 50 of the Community Development Code is hereby amended to reflect the language depicted in Exhibit A.

Ordained this \_\_\_\_ day of \_\_\_\_\_, 2024

\_\_\_\_\_  
Joseph Passiment, Chairman

\_\_\_\_\_  
Sarah Brock, Clerk to Council

## Exhibit A

**1.3.50 - Exemptions**

- A. The provisions of this Development Code shall not require formal subdivision of land as a result of actions taken by the State of South Carolina and its political subdivisions to acquire land or interests in land for public right-of-way and easements.
- B. County Council, public utilities, or County agencies may be exempt from the provisions of this Development Code when an emergency exists such that it is impossible to submit to the normal procedures and standards of this Development Code and quick and instant action is necessary to secure the public health, safety, or welfare. The County Council shall ratify such exemption after the fact at its next regularly scheduled meeting, and shall base its ratification on specified findings of fact related to the emergency involved.
- C. A public utility or public infrastructure installation (water, sewer, roads, gas, stormwater, telephone, cable, etc.) is exempt from the standards of this Development Code, except:
  - 1. Thoroughfare standards, in Division 2.9 (Thoroughfare Standards);
  - 2. Wetland standards, in Section 5.11.30 (Tidal Wetlands), and Section 5.11.40 (Non-Tidal Wetlands);
  - 3. River Buffer standards, in Section 5.11.60 (River Buffer);
  - 4. Tree Protection standards, in Section 5.11.90 (Tree Protection);
  - 5. Stormwater management standards, in Section 5.12.30 (Stormwater Standards);
  - 6. Utility standards, in Section 4.1.210 (Regional (Major) Utility);
  - 7. Wireless communication facilities standards, in Section 4.1.320 (Wireless Communications Facility).
  - 8. Historic Preservation standards, in Division 5.10 (Historic Preservation).
- D. The Department of Defense shall be exempt from the standards of this Development Code.
- E. The paving of dirt roads are deemed not to constitute "development" and shall be exempt from the standards of this Development Code if the action meets one of the following conditions:
  - 1. Existing County maintained dirt roads which are improved and/or paved as part of Beaufort County's Dirt Road Paving Program as set forth in Beaufort County Policy Statement 15 and Policy Statement 17;
  - 2. Private dirt roads with adequate existing stormwater conveyance systems where the project is not related to a pending or proposed development of adjacent land, and the proposed paving meets the Thoroughfare Construction Specifications in Section 2.9.80. Private dirt roads without adequate existing stormwater conveyance systems will be required to construct a conveyance system per the County's Stormwater Best Management Practices (BMP) Manual but will not be required to meet the Effective Impervious Values in Table 5.12.30.A or provide Retention/Detention Facilities.
- F. **County public service uses.** Due to the unique nature of certain county public service uses and the need to locate these uses in certain areas of the county irrespective of prevailing zoning district regulations, Beaufort County may establish in any zoning district any public service use authorized to county government by S.C. Code §4-9-30, as amended, or any other statute or law of the State of South Carolina; provided that all public service uses meet the following requirements:
  - 1. The use shall meet the applicable requirements in Article 5 (Supplemental to Zones) of the Community Development Code.
  - 2. **Public hearing for county public service uses.** Prior to the granting of a zoning compliance for county public service uses, a site plan in accordance with standards contained herein must be



submitted and approved. The Beaufort County Planning Commission will hold a public hearing on the matter at least 15 days' notice of the time and place of which will be published in a newspaper of general circulation in Beaufort County. Notice will be given by adequately posting the properties affected, with at least one notice being visible from each public thoroughfare that abuts the property, at least 15 days prior to the public hearing. The Beaufort County Planning Commission will, after conducting the public hearing, provide a recommendation to the County Council with findings of fact regarding compliance with the Beaufort County Comprehensive Plan. Upon the Planning Commission's recommendation being received, ~~and~~. The Beaufort County Council will hold a public hearing on the matter at least 15 days' notice of the time and place of which will be published in a newspaper of general circulation in Beaufort County. Notice will be given by adequately posting the properties affected, with at least one notice being visible from each public thoroughfare that abuts the property, at least 15 days prior to the public hearing. Based on the review of the planning commission's recommendation, information presented at the public hearings, and probable impact of such uses on contiguous uses and conditions, the Council may elect to deny the request in favor of a more acceptable site elsewhere, approve the use or approve the use with conditions and/or restrictions.



# BEAUFORT COUNTY COUNCIL AGENDA ITEM SUMMARY

Item 12.

## ITEM TITLE:

*COMPREHENSIVE PLAN AMENDMENT TO ADD THE BEAUFORT COUNTY HOUSING IMPACT ANALYSIS AS AN APPENDIX TO THE 2040 COMPREHENSIVE PLAN*

## MEETING NAME AND DATE:

*Community Services and Land Use Committee Meeting, September 9, 2024*

## PRESENTER INFORMATION:

*Robert Merchant, AICP, Director, Beaufort County Planning and Zoning  
(10 minutes needed for item discussion)*

## ITEM BACKGROUND:

*In 2023, Act 57 of the South Carolina General Assembly amended SC Code §6-4-12 to allow Accommodations Tax Revenue (ATAX) to be eligible to support workforce housing. However, to enable state ATAX funds to be eligible for workforce housing, the County must complete and adopt a Housing Impact Analysis to the Comprehensive Plan.*

## PROJECT / ITEM NARRATIVE:

*This analysis includes a review of costs, prices, availability of financing, general housing costs, development standards, and the impact of the ordinance on households.*

## FISCAL IMPACT:

*Not applicable*

## STAFF RECOMMENDATIONS TO COUNCIL:

*Staff recommends approval.*

## OPTIONS FOR COUNCIL MOTION:

*Motion to approve, modify, or deny the application as submitted.\**

*\*Council's decision must be based on the standards in Section 7.3.20 C of the Community Development Code (Attachment A to this AIS) and must clearly state the factors considered in making its decision and the basis or rationale for the decision. (7.4.90 B.3). These factors are as follows:*

- 1. Whether capital investments, population trends, land committed to development, density, use, or other conditions have changed that justify the amendment;*
- 2. Whether the proposed amendment is consistent with the Comprehensive Plan's goals and policies;*
- 3. Whether the proposed amendment is necessary to respond to state and/or federal legislation;*
- 4. Whether the proposed amendment would result in development that is compatible with surrounding land uses;*
- 5. Whether and the extent to which the proposed amendment would affect the capacities of public facilities and services, including roads, utilities, law enforcement, fire, EMS, schools, parks and recreation, solid waste, and drainage facilities; and*

6. *Whether, and the extent to which, the proposed amendment would result in negative impacts to natural resources.*

### **Attachment A.**

**CDC Section 7.3.20 B.7** Comprehensive Plan Amendment provides:

The County Council's decision shall be based on the standards in Subsection 7.3.20.C.

**CDC Section 7.3.20 Code Text Amendment Review Standards.**

The advisability of amending the Comprehensive Plan is a matter committed to the legislative discretion of the County Council and is not controlled by any one factor. In determining whether to adopt or deny the proposed amendment, the County Council shall weigh the relevance of and consider the following:

1. Whether capital investments, population trends, land committed to development, density, use, or other conditions have changed that justify the amendment;
2. Whether the proposed amendment is consistent with the Comprehensive Plan's goals and policies;
3. Whether the proposed amendment is necessary to respond to state and/or federal legislation;
4. Whether the proposed amendment would result in development that is compatible with surrounding land uses;
5. Whether and the extent to which the proposed amendment would affect the capacities of public facilities and services, including roads, utilities, law enforcement, fire, EMS, schools, parks and recreation, solid waste, and drainage facilities; and
6. Whether, and the extent to which, the proposed amendment would result in negative impacts to natural resources.

**CDC Section 7.4.90 B.3** provides:

County Council's decision shall clearly state the factors considered in making the decision and the basis or rationale for the decision.

## COMPREHENSIVE PLAN AMENDMENT REQUESTS

I MOVE THAT WE GRANT/(DENY) THE REQUEST FOR THE COMPREHENSIVE PLAN AMENDMENT FOR THE FOLLOWING REASONS **(STATE ALL THAT SUPPORT YOUR MOTION).**

### THE REQUEST:

1. CAPITAL INVESTMENTS, POPULATION TRENDS, LAND COMMITTED TO DEVELOPMENT, DENSITY, USE, OR OTHER CONDITIONS HAVE/ (HAVE NOT) CHANGED THAT JUSTIFY THE AMENDMENT; \_\_\_\_\_
2. IS/ (IS NOT) CONSISTENT WITH THE COMPREHENSIVE PLAN'S GOALS AND POLICIES; \_\_\_\_\_
3. IS/ (IS NOT) NECESSARY TO RESPOND TO STATE AND/OR FEDERAL LEGISLATION; \_\_\_\_\_
4. WOULD/ (WOULD NOT) RESULT IN DEVELOPMENT THAT IS COMPATIBLE WITH SURROUNDING LAND USES; \_\_\_\_\_
5. WOULD NOT/ (WOULD) AFFECT THE CAPACITIES OF PUBLIC FACILITIES AND SERVICES, INCLUDING ROADS, UTILITIES, LAW ENFORCEMENT, FIRE, EMS, SCHOOLS, PARKS AND RECREATION, SOLID WASTE, AND DRAINAGE FACILITIES; \_\_\_\_\_
6. WOULD NOT/ (WOULD) RESULT IN NEGATIVE IMPACTS TO NATURAL RESOURCES; \_\_\_\_\_



## MEMORANDUM

**TO:** Beaufort County Planning Commission

**FROM:** Robert Merchant, AICP, Beaufort County Planning and Zoning Department

**DATE:** July 15, 2024

**SUBJECT:** COMPREHENSIVE PLAN AMENDMENT TO ADD THE BEAUFORT COUNTY HOUSING IMPACT ANALYSIS AS AN APPENDIX TO THE 2040 COMPREHENSIVE PLAN

### STAFF REPORT:

#### **A. BACKGROUND:**

**Case No.**

CDPA-000041-2024

**Proposed Amendment:**

Addition of the Beaufort County Housing Impact Analysis to the 2040 Comprehensive Plan

#### **B. SUMMARY AND BACKGROUND:**

In 2023, Act 57 of the South Carolina General Assembly amended SC Code §6-4-12 to allow Accommodations Tax Revenue (ATAX) to be eligible to support workforce housing. The new law allows up to 15% of both state and local ATAX to be used to support workforce housing for those earning between 30%-120% Area Median Income (AMI). However, to enable state ATAX funds to be eligible for workforce housing, the County must complete and adopt a Housing Impact Analysis to the Comprehensive Plan. This analysis must include a review of costs, prices, availability of financing, general housing costs, development standards, and the impact of the ordinance on households.

#### **C. CODE TEXT AMENDMENT REVIEW STANDARDS:** In determining whether to adopt or deny the proposed amendment, the County Council shall weigh the relevance of and consider the following:

##### **1. Whether capital investments, population trends, land committed to development, density, use, or other conditions have changed that justify the amendment;**

Yes, affordable housing is a documented growing need for the County as the population of residents and range amongst income has increased.

**2. Whether the proposed amendment is consistent with the Comprehensive Plan's goals and policies;**

Yes, this addition will enable the County to tap into funding and assist with the implementation of the goals set forth in the Housing section of the Comprehensive Plan.

**3. Whether the proposed amendment is necessary to respond to state and/or federal legislation;**

Yes, this analysis was completed in response to an amendment to SC Code §6-4-12. This amendment, also known as Act 57, allows 15% of both local and state ATAX to be used to support workforce housing.

**4. Whether the proposed amendment would result in development that is compatible with surrounding land uses;**

Yes, all the projects would follow the standards set forth in the Community Development Code.

**5. Whether and the extent to which the proposed amendment would affect the capacities of public facilities and services, including roads, utilities, law enforcement, fire, EMS, schools, parks and recreation, solid waste, and drainage facilities; and**

Yes, it will affect public facilities and services in areas as any development does. However, it will help job retention for those within these workforces.

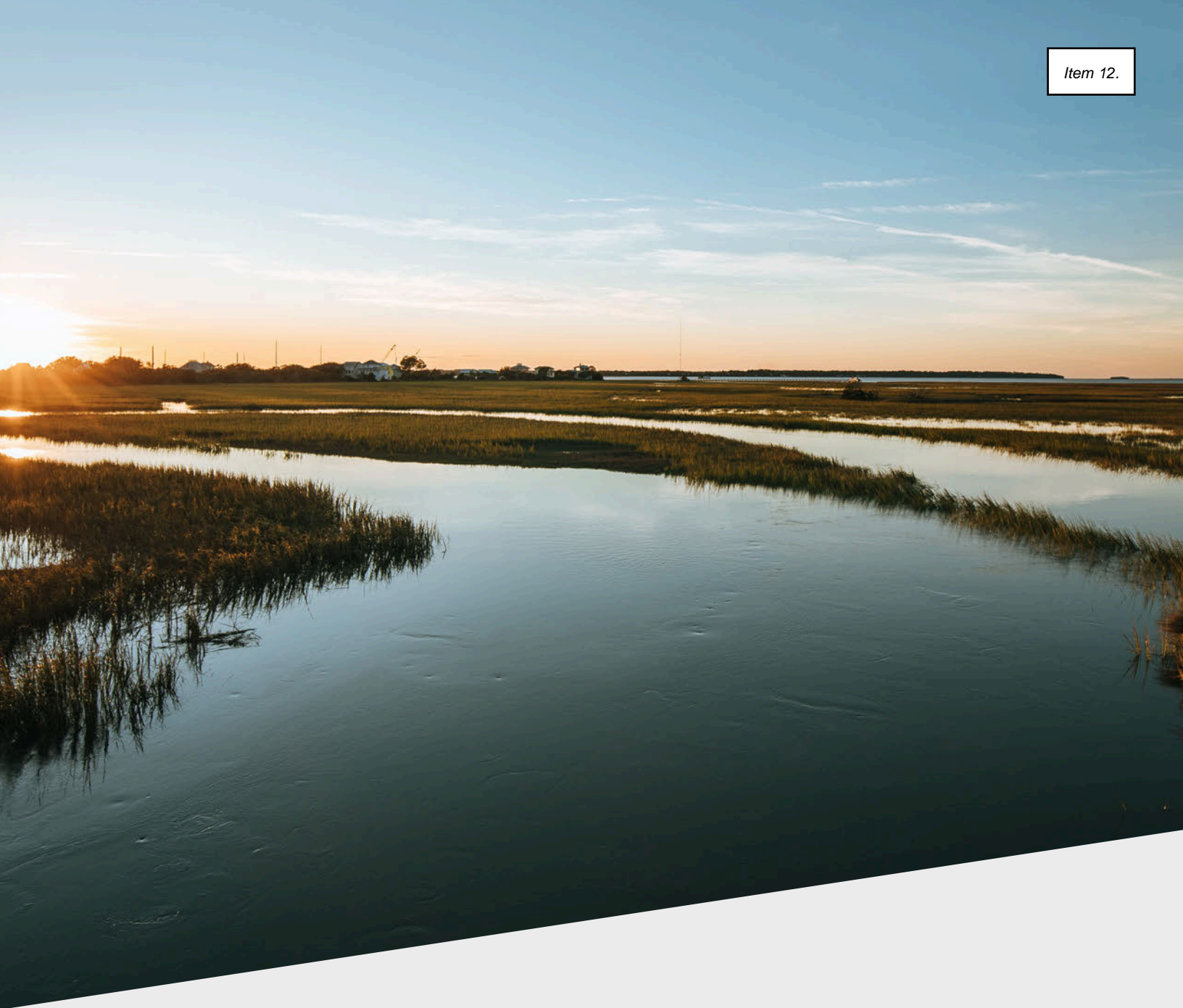
**6. Whether, and the extent to which, the proposed amendment would result in negative impacts to natural resources.**

No, any development on the site would be required to adhere to the natural resource protection, tree protection, wetland protection, and stormwater standards in the Community Development Code and the Stormwater BMP Manual.

**D. RECOMMENDATION:** Staff recommends approval.

**E. ATTACHMENTS:**

- Beaufort County Housing Impact Analysis



# HOUSING IMPACT ANALYSIS

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JUNE 2024 // PREPARED BY TOGETHER CONSULTING



Beaufort County  
SOUTH CAROLINA

*Beaufort County Housing Impact Analysis*

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# Acknowledgements

The following information outlined within this Housing Impact Analysis was made possible thanks to several resources and analysis in past planning and research efforts, various local, state and community data resources, and feedback from local housing partners, developers and realtors.

## Community Partners:

- Hilton Head Area Realtors Association
- Beaufort Jasper Realtors Association
- Lowcountry Council of Governments
- Hilton Head Area Home Builder Association
- Beaufort Chamber of Commerce
- Local Builders and Developers

## County Staff:

- John Robinson, Interim County Administrator
- Thomas Keaveny, II, Beaufort County Attorney
- Chuck Atkinson, Assistance County Administrator for Development Services
- Robert Merchant, Planning & Zoning Department Director
- Christine Webb, Director of Compliance, Standards & Internal Controls
- Elizabeth Anderson, Planner

## County Council:

- Joe Passiment, Chairman
- Larry McElynn, Vice-Chairman
- Gerald Dawson, District 1
- David Bartholomew, District 2
- York Glover, District 3
- Alice Howard, District 4
- Anna Maria Tabernik, District 6
- Logan Cunningham, District 7
- Paula Brown, District 8
- Mark Lawson, District 9
- Thomas Reitz, District 11

## Consultants:

Tammie Hoy Hawkins

Together Consulting

*Design Support: Virginia Howat*



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# Executive Summary

In November 2021, Beaufort County Council adopted the County's 2040 Comprehensive Plan. As part of this Plan, the County highlighted affordable housing as a critical need within their overall Housing Element. Prior to the adoption of this plan, the County commissioned a 2017 Housing Needs Assessment conducted by the Bowen Research group. The study was a deep dive into the County's housing market including current conditions, trends, and growth patterns along with an evaluation of projected housing needs over the next 5-year period. The Assessment was finalized in 2018. Much of the data referenced in this Housing Impact Analysis is derived from this Study along with insights from the County's 2040 Comprehensive Plan and complimented by more recent local and national data sources. Although the Bowen Study is over five years old, much of the analysis and trends are still relevant today and many of the predictions established in the 2018 plan have been realized and in some cases, have accelerated even more than anticipated, especially as it relates to housing affordability.

Within both documents, several strategies were recommended to the County for implementation to address the growing demand for more affordable housing to meet the needs of its residents and workforce. The County has already implemented several of these recommendations including but not limited to helping to establish a regional housing trust fund to support more financing and funding for affordable workforce housing, as well as offering various incentives to developers building affordable housing such as density bonuses where feasible and impact fee waivers for certain qualifying projects. Although these are valuable programs to support affordable housing production and preservation, the County has limited funding and financial resources to support the amount of affordable housing needed across the County footprint. The County receives limited federal or state funding for housing, therefore they must define local revenue sources to fill financing gaps. With the recent passage of Act 57 of the 2023 South Carolina General Assembly, amending SC Code 6-4-12, to allow Accommodations Tax Revenue (ATAX) to be eligible to support workforce housing, the County now has a new opportunity to increase local funding to support affordable housing projects.

This new law allows up to 15% of both local and state ATAX to be used to support workforce housing for those individuals earning between 30% and 120% Area Median Income (AMI). To enable the state ATAX funds to be eligible for workforce housing, the County must complete, as required by amended Section 6-4-12 of South Carolina law, a Housing Impact Analysis (HIA).

This analysis must include an overview of the following key data points and considerations:

- The cost of developing, constructing, rehabilitating, improving, maintaining, or owning single family or multifamily dwellings,
- A review of the purchase prices of new homes or the fair market value of existing homes,
- The cost and availability of financing to purchase or develop housing,
- General housing costs; including a brief summary indicating reasonable cost estimates,
- A review of density, location, setback, size, or height development on a lot, parcel, land division, or subdivision that might impact housing; and
- An analysis of the relative impact of the ordinance on low- and moderate-income households.

This Housing Impact Analysis (HIA) must also be approved by the County Planning Commission, adopted as an amendment to County's Comprehensive Plan and approved by Council. The County is also required to provide the HIA to the members of the legislative body of the local government, the Department of Revenue, and the Tourism Expenditure Revenue Committee before an ordinance is considered by the legislative body. The Department of Revenue may not disburse any accommodations taxes to the local government for purposes of development of workforce housing unless and until the local government has provided the HIA to the parties mentioned above.

The following Beaufort County HIA takes into account insights from previous housing studies along with housing trend research over the past few years, while also highlighting current economic and housing conditions, emphasizing the growing demand for workforce housing across the County.



# Introduction

The Beaufort County area is made up of a variety of diverse communities from resort areas to beach towns to urban cores to rural communities. These diverse community landscapes will require a variety of strategies when addressing housing needs. Many developments in the county are within city and town submarkets, but the County recognizes that affordable housing is a need that impacts everyone regardless of jurisdictional boundaries. The success of the overall community depends on the County working closely with each jurisdiction to address the housing needs of the diverse workforce.

The Beaufort County housing market has continued to grow over the past decade with an accelerated growth in residential construction totaling 19,857 units developed since 2010. Based on a recent housing market study conducted by Ronald Brown, Research & Analysis, 17,112 of those were single family homes and 2,745 were multifamily housing units, with the largest gain in multifamily in 2021. Prior to the last five years, there were few multifamily projects completed within the County. Although there have been recent housing development within the county, including two Low Income Housing Tax Credit (LIHTC) projects currently underway, there are still too few affordable housing rental options within the County to meet the growing demand.

The 2018 Bowen Housing Needs Assessment provided the County with a better understanding of market conditions at the time and outlined the projected changes expected over the coming years that could influence future housing needs. This Housing Needs Assessment is the most current housing study completed for the county, outside the County's Comprehensive Plan, completed in 2021. The Assessment focused on select sub-markets within Beaufort County, an evaluation of past, current and projected demographic characteristics, employment trends, economic drivers, and all major housing components within the market (for-sale/ownership and rental housing) including housing costs verses area incomes. Several key recommendations from the assessment included regional strategies that would not only support Beaufort County unincorporated residents but all submarket jurisdictional partners' workforce housing needs.

One specific recommendation led to a deep dive study by the Asakura Robinson consulting group on creating a regional housing trust fund which led to the formal creation of the Beaufort Jasper Housing Trust. The new Fund became an official nonprofit in 2023 and hired its first Executive Director in April 2024.





The Assessment also evaluated factors that were affecting housing market conditions, development barriers, and affordability. All of these factors are also key components as part the Act 57's required Housing Impact Analysis. It is important to stress that the following document is a moment in time snapshot of the economic and housing market conditions in Beaufort County over the last few years along with an analysis of current market trends. The housing market within the County and the submarket communities are not static and continue to shift daily.

The goal of the Housing Impact Analysis is to provide an overview for the growing demand for workforce housing and make a clear connection between the economic need for housing and the community's workforce. In addition, the Analysis dives into what the County is already doing to support workforce housing including funding committed and also local policy efforts to remove barriers to workforce housing.

:



# Background

Affordable housing is a growing concern for Beaufort County. The 2018 Bowen study indicated a need for over 6,000 total new housing units for rental and ownership over a five year period to meet the existing and projected demand, with the greatest need for the lowest income households, along with a significant need for moderate-income households. The study recommended that future rental housing development should consider a variety of rent and income-eligibility levels, and there is an equal need for more home-ownership housing priced under \$200,000, primarily due to projected household growth and limited supply.

These are pre-pandemic estimates. The demand has accelerated over the past five years due to in-migration of new residents and expanded growth in the region. Based on the Department of Housing and Urban Development's annual median incomes, the 2023 median income for a family of four in Beaufort County, was \$111,300 - up by almost 30% from previous years. Considerable growth in income is due to the influx of new residents that either retired to the area or remote workers bringing higher salaries to the region post-pandemic, which also explains the growth in senior population. A 2024 Beaufort Chamber Economic Report indicated that Beaufort ranked 10th out of all counties in population growth for South Carolina. The same Economic Report also indicated that Beaufort County households' rank higher than the state average for mortgage holders and renters that are cost-burdened.

In addition to the completion of the 2018 Bowen Housing Needs Assessment and the Asakura Robinson's Housing Trust Fund Analysis, Beaufort County completed their 2040 Comprehensive Plan in November 2021. The Comprehensive Plan acknowledges that the County is closely linked to its municipalities and adjacent counties, sharing roads, waterways, habitats, and open spaces which do not follow jurisdictional boundaries. Therefore the County share many community connections with the other areas between where people live, work, worship, and play throughout the region. This requires that high levels of cooperation and collaboration be maintained within the region so that local identities can be expressed within a framework of shared goals regarding infrastructure, environmental protection, growth, economic development, and affordable housing.

Within the Comprehensive Plan, the County highlights core strategies to include the investment in new public infrastructure, creating incentives for affordable housing, and focusing on balanced development that mitigates environmental harm, so future generations will be able to enjoy the quality of life and economic prosperity offered by Beaufort County's unique landscape and culture. As part of the Housing Element within the Comprehensive Plan, the County's goal is to promote quality, affordable housing available and accessible to all residents.

The lack of quality affordable housing was identified as a growing challenge for the County and the submarkets within the county. These challenges are not just the lack of affordable housing options for families but an increasing issue for the growing senior population, many of which are still working, but also live on fixed incomes with little options for housing that is affordable. Based on the Comprehensive Plan, the greatest projected growth by household age group is expected to occur among seniors, which creates the need for more senior-based housing, health care and programs, assisted living facilities and continuing care facilities. Many of these facilities require an extensive, diverse workforce to support residents, many of which earn lower incomes. In many cases workers find it difficult to find affordable housing near these senior communities and have to drive- -often long distances- -to get to their workplace, which congests roadways, utilizes land for parking, and lengthens the workday.

Although Act 57 allows the County to utilize ATAX funding to support workforce housing that supports households up to 120% of the area median income, the County through its Comprehensive Plan and Development Code has defined affordable housing and prioritized the following populations below:

- Owner occupied affordable housing unit: A dwelling unit where at least one occupant is an owner, and where all occupants have, in the aggregate, household income less than or equal to one hundred (100%) percent of the area median income (AMI) for owner occupied units. Area median income (AMI) shall be determined annually by the United States Department of Housing and Urban Development (HUD) as adjusted by the Beaufort County Human Services Department or its successor. At the time of this report, Beaufort County AMI for a family of four was \$111,300.
- Rental affordable housing unit: A dwelling unit, where occupants have, in the aggregate, household income less than or equal to eighty (80%) percent of the area median income (AMI) for rental units. AMI shall be determined annually by HUD as adjusted by the Beaufort County Human Services Department or its successor.
- Qualified household: Households where occupants have, in the aggregate, a household income less than or equal to one hundred (100%) percent of the AMI for owner occupied units, and a household income less than or equal to eighty (80%) percent of the AMI for rental units.
- Initial maximum allowable sales price: An amount equal to three (3) times one hundred (100%) percent of the AMI plus any subsidy available to the buyer.
- Affordable rent: Affordable rent is based on an amount not to exceed thirty (30%) percent of eighty (80%) percent of the AMI as published annually by HUD based on household size, inclusive of a utility allowance. Utility allowances are as provided by HUD guidelines.





With a focus on serving these populations, the County's Comprehensive Plan also indicated the County will need to play an active role in affordable housing solutions in order to build a sustainable future for tourism and other major industries, protect its military bases, and continue to be a desirable place to live for people of all income levels.

A comprehensive affordable housing approach will:

- Foster the creation of affordable housing near jobs, services, and public transit.
- Reduce regulatory barriers to the creation of affordable housing.
- Establish an ongoing funding source to address housing needs.
- Partner with non-profit agencies and the private sector.
- Work regionally to address affordable housing needs.



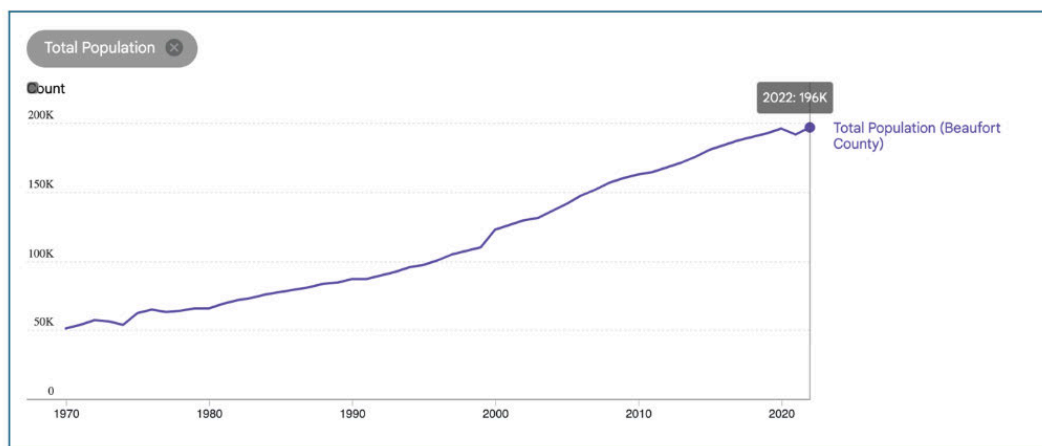


# Population Analysis

Beaufort County population growth over the past decade has had a significant impact on the overall availability of housing - accelerating the need for more housing at all income levels particularly for low- and moderate-income households more burdened by escalating prices. The Bowen report indicated from 2000 to 2010, Beaufort County population increased by 41,298, or by 34.2%, and added an additional 25,216 (15.5%) people between 2010 and 2017. At the time of the study completion in 2018, the total population was estimated at 187,445 with a projected increase to 225,359 by 2027. (See Bowen Chart below)

	Total Population – Long Term (10-Year) Projections			
	2017 (Estimated)	2027 (Projected)	Change 2017-2027	
			Number	Percent
<b>Beaufort County</b>	187,445	225,359	37,914	20.2%
<b>Beaufort</b>	12,010	14,162	2,152	17.9%
<b>Bluffton</b>	18,889	24,749	5,860	31.0%
<b>Hilton Head</b>	37,797	44,837	7,040	18.6%
<b>Port Royal</b>	11,958	13,800	1,842	15.4%
<b>Northern Unincorporated</b>	26,842	31,928	5,056	18.8%
<b>Southern Unincorporated</b>	44,325	53,265	8,940	20.2%
<b>Unincorporated Islands</b>	19,570	23,362	3,792	19.4%

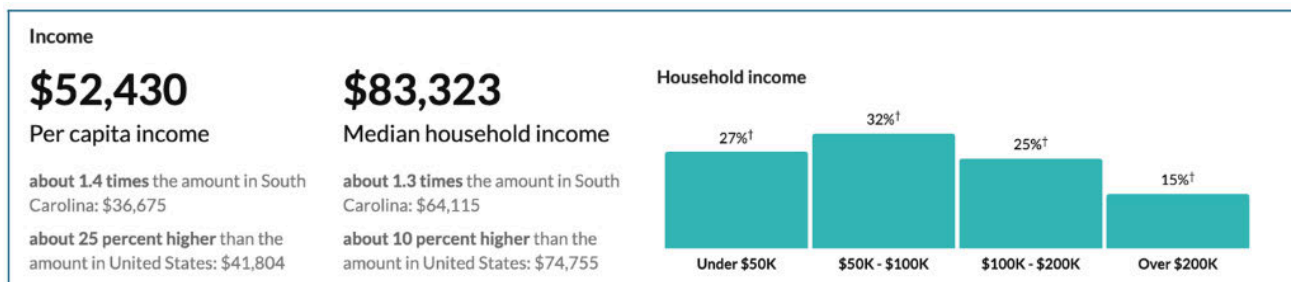
2022 data from US Census, via datacommons.org indicated the County population at 196,000, approximately 4.5% increase over the 5-year period. According to worldpopulationreview.com, the estimated population of Beaufort County, South Carolina in 2024 is 201,811, which is a 1.42% increase from the previous year. The county's population has grown 23.93% since 2010, when it was 162,843. The County continues to grow on the pace as predicted by the Bowen report.



Year	Population	Growth
2024	201,811	2,832
2023	198,979	2,832
2022	196,147	4,150
2021	191,997	4,182

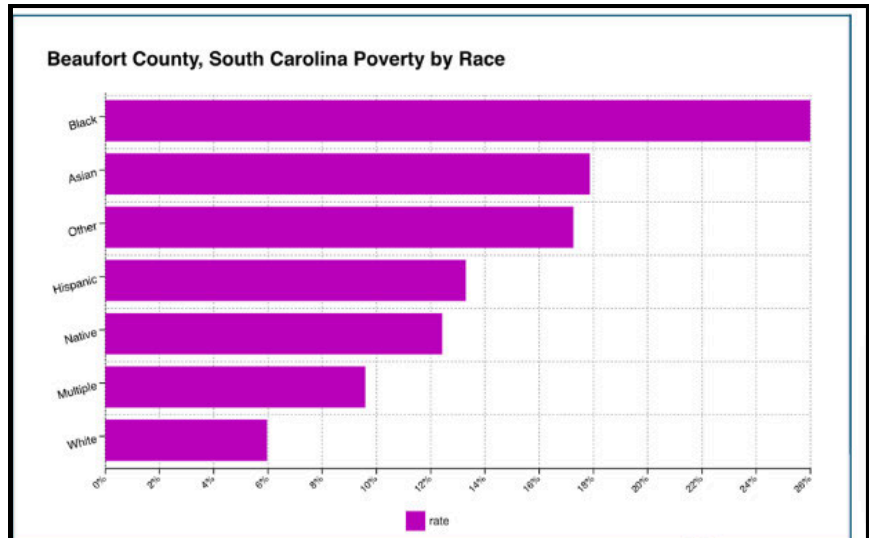
Source: world population review

Like Beaufort County, adjacent coastal communities are growing just as rapidly, which has an impact on housing stock and availability for housing options near employment centers in Beaufort. In March 2024, The State paper indicated, most of South Carolina's 46 counties gained population in 2023, but 10 of them grew faster than the rest. Of those, Jasper County had the biggest population gains at 4.87% year-over-year. It was followed closely by Berkeley County at 4.19%. Horry County came in third with a 3.74% increase in 2023. Much of the population growth to South Carolina are households moving from higher cost markets like the northeast and midwestern cities, which has also impacted the area's median income growth.



With the in-migration of higher income households, existing residents are feeling the increased pressure on the housing market and finding it more difficult to afford housing within the County. In 2023, HUD indicated that 100% of the Area Median Income (AMI) for a family of four was \$111,300. Yet a significant portion of the major industry workforce earn less than 80% of the AMI.

Many working families live below the poverty line in Beaufort County, and the poverty rate among those that worked full-time for the past 12 months was 2.84%. Among those working part-time, it was 8.86%. 26% of Black households in Beaufort County live below the poverty line, while the white population living below poverty was 5.97%. Although poverty continues to be an issue, Beaufort County has seen a growth in higher income households due to in-migration post Covid-19.

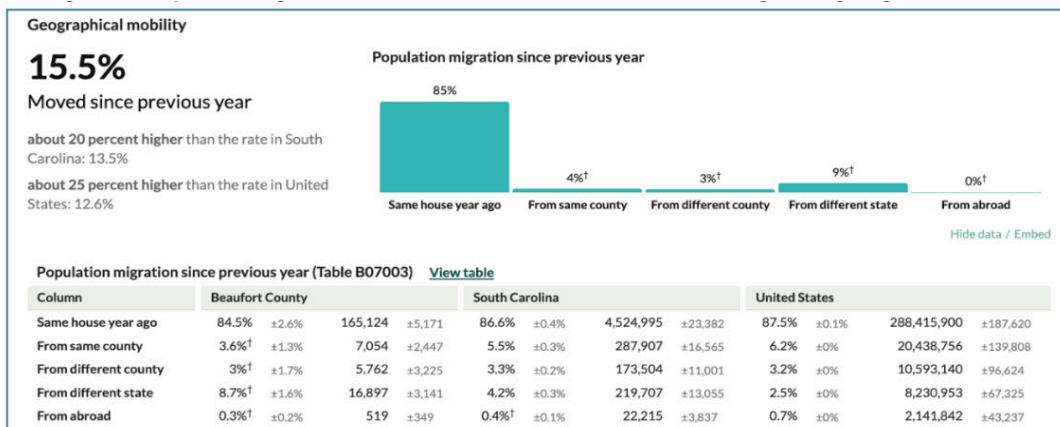


#### ACS 2022 1-year

Table universe: Households

Column →	Beaufort County, SC	South Carolina	United States
Less than \$10,000	3.9% ±1.2%	6.1% ±0.3%	5.5% ±0%
\$10,000 to \$14,999	3% ±1.5%	4.2% ±0.3%	3.7% ±0%
\$15,000 to \$19,999	2.2% ±1%	3.7% ±0.2%	3.2% ±0%
\$20,000 to \$24,999	2.3% ±1%	4.1% ±0.3%	3.6% ±0%
\$25,000 to \$29,999	2.4% ±1.1%	3.9% ±0.3%	3.5% ±0%
\$30,000 to \$34,999	3.5% ±1.6%	4.8% ±0.3%	3.8% ±0%
\$35,000 to \$39,999	3.5% ±1.5%	4.3% ±0.2%	3.5% ±0%
\$40,000 to \$44,999	2.5% ±1%	4.3% ±0.2%	3.8% ±0%
\$45,000 to \$49,999	3.8% ±1.3%	4% ±0.3%	3.4% ±0%
\$50,000 to \$59,999	5.5% ±1.4%	7.5% ±0.3%	6.9% ±0%
\$60,000 to \$74,999	10.2% ±2%	9.9% ±0.4%	9.4% ±0.1%
\$75,000 to \$99,999	16.6% ±2.8%	13.5% ±0.4%	12.8% ±0%
\$100,000 to \$124,999	9.7% ±1.9%	9.3% ±0.4%	9.9% ±0.1%
\$125,000 to \$149,999	6.8% ±1.6%	6.2% ±0.3%	7% ±0%
\$150,000 to \$199,999	8.8% ±1.9%	6.6% ±0.3%	8.7% ±0%
\$200,000 or more	15.3% ±2.5%	7.5% ±0.3%	11.5% ±0.1%

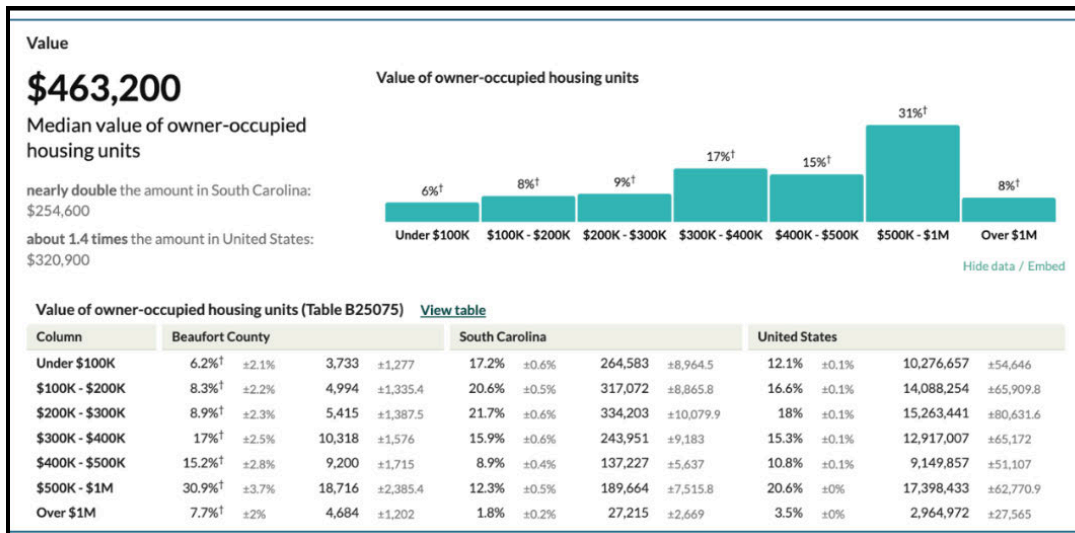
The ACS 2022 1-year analysis here shows a high percentage (over 15%) of those households earn over \$200,000/year, about 2 times the state average, with a significant percentage of the overall population earning less than \$100,000. The following chart indicates that close to 9% of the households in Beaufort County moved from another state, some for retirement and some because of the ability to work remotely.





With the growth in population, in particular, with the in-migration of higher-income households to the area, housing prices have significantly escalated. The 2022 Census Reporter indicated a median value of \$463,200 for owner-occupied housing in Beaufort County, and 31% of all homes are valued between \$500,000-\$1M, more than double the rate of homes in this range for South Carolina as a whole. (The median home value for South Carolina is \$254,600 and \$320,900 for the United States.)

As predicted in the Bowen study, continued demand for housing and escalating prices in the area is making it more difficult for many working families to afford stable housing options in the region, particularly for workers in tourism and service sectors.



# Economic and Employment Analysis

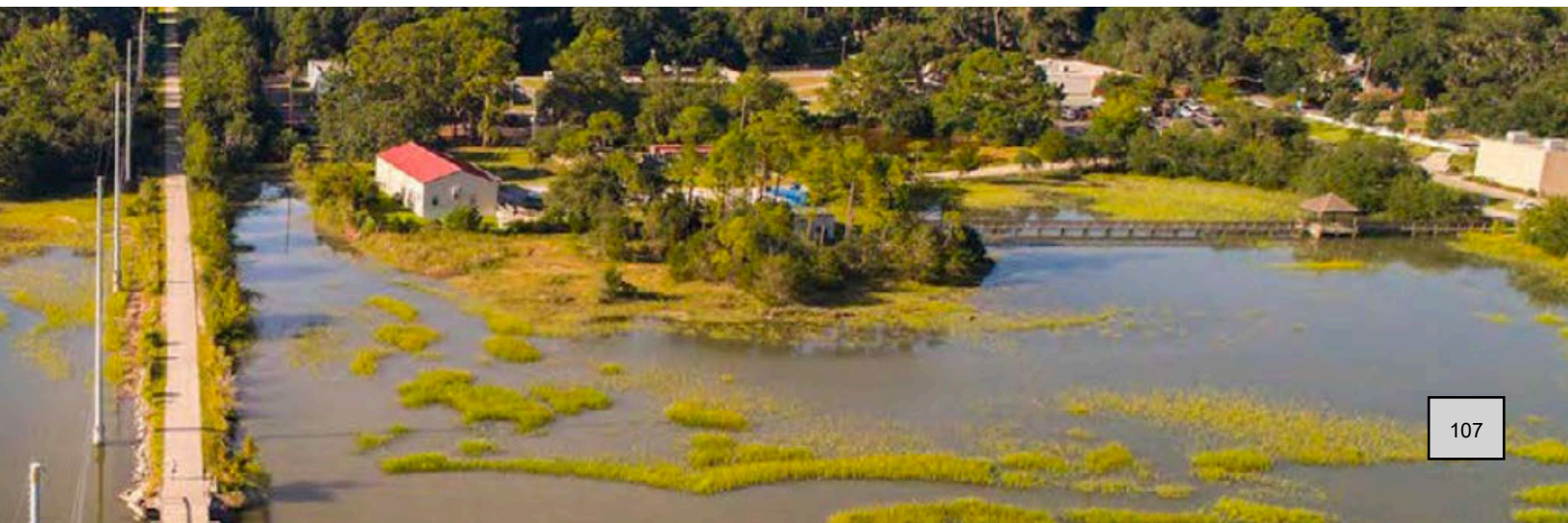
## Economic Summary

The local Beaufort County economy is diverse but greatly influenced by tourism and nearby military bases. The three largest industry sectors in the county include Accommodations & Food Service (20.1%), Retail Trade (16.0%) and Health Care & Social Assistance (13.0%).

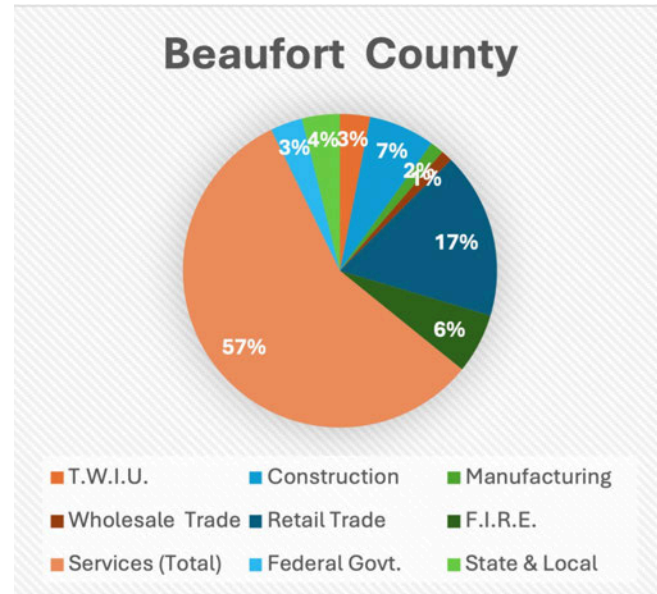
Beaufort County experiences a significant amount of tourism throughout the year due to its coastal location and the fact that it is the home of the Parris Island Marine Corps Recruitment Depot and the Marine Corps Air Station Beaufort. Between these two Marine installations and the family visitation and graduation ceremonies, they bring in nearly 200,000 visitors alone annually. The three previously mentioned industry sectors are also heavily-supported by tourism, and although the County is seeking to diversify the county's economy, tourism is still a lead employer for the area and will continue to be in the long-term. (Bowen)

Public and private sectors continue to invest in the local economy to spur economic growth in existing industries while cultivating the growth of new employment sectors. Based on the Bowen report, many of the new business openings and expansions reported fell within the service industry (as do the three largest job sectors for Beaufort County), which typically have low- to moderate wages, and should be considered when evaluating current and future housing development needs.

During interviews with employers as part of the Bowen study, employers indicated that a significant number of new job creation was anticipated to occur within positions at \$50,000 annual wages or less, as seven (7) of the 21 employers anticipate 10 to 50 new jobs to be created over the next five years in this annual wage range, further exacerbating the need for more affordable housing to match these income levels. The 2024 Chart below shows over 57% of the County's workforce within the Service Sector and 17% in Retail.





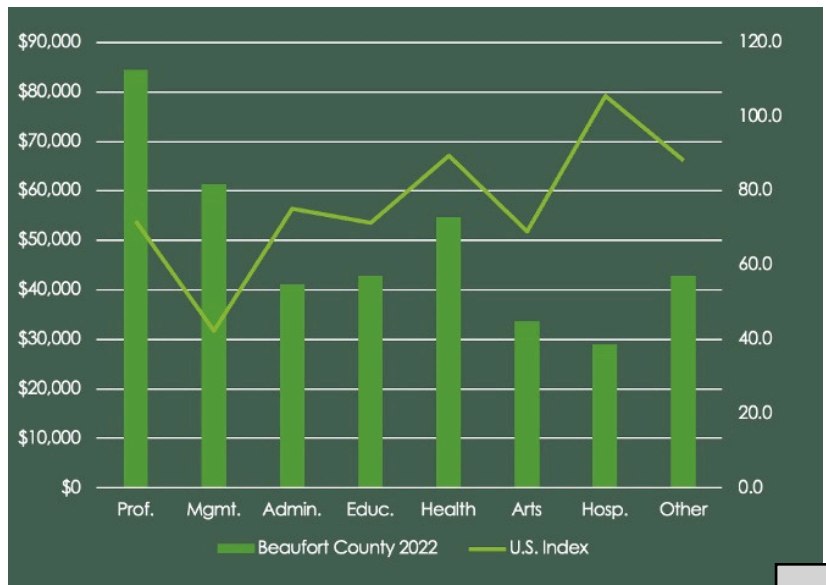


The following charts were shared as part the of Beaufort Chamber's 2024 Data dashboard presentation.

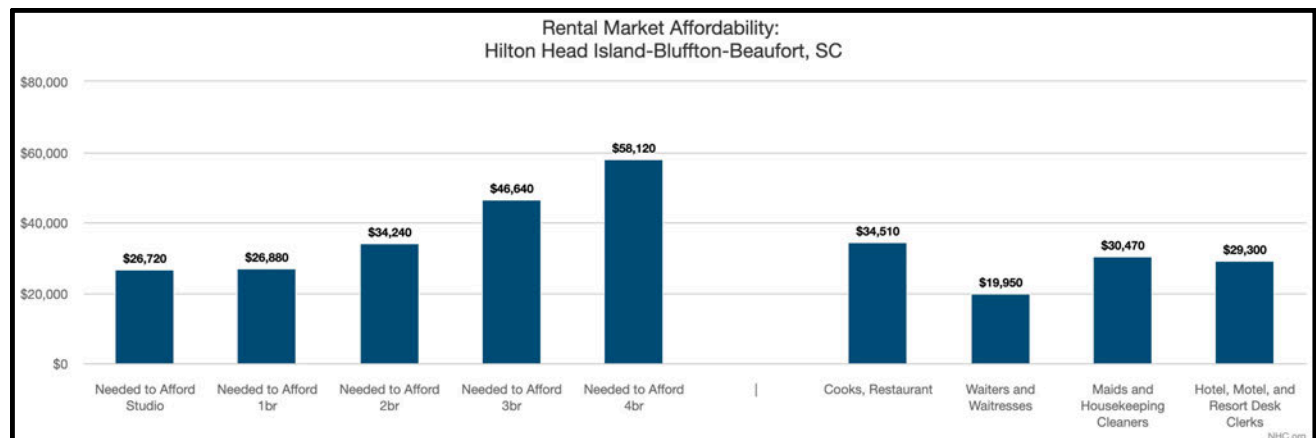
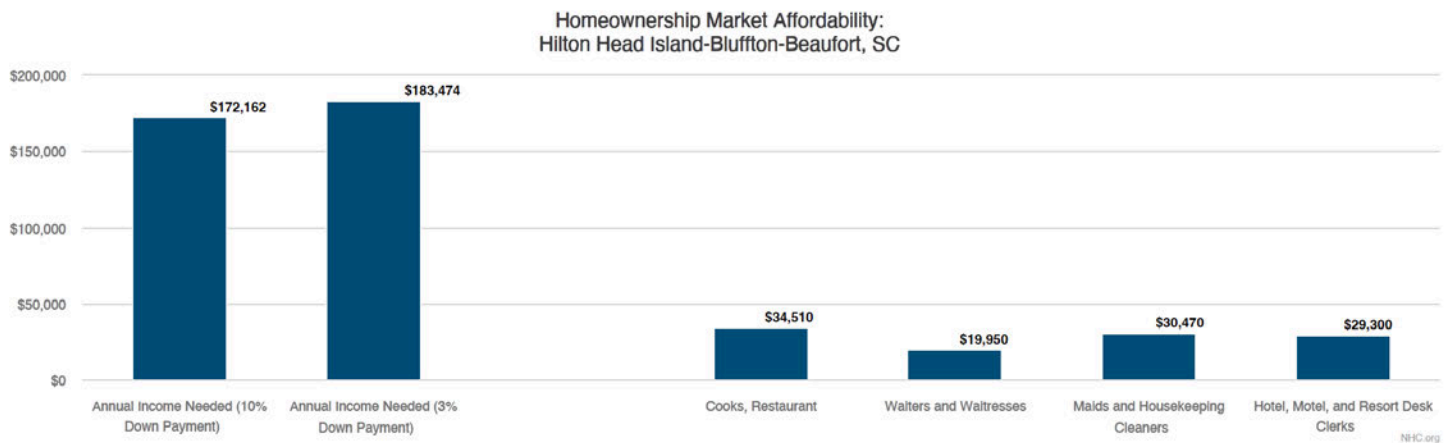
### Employment in Beaufort County by Sectors

Based on this chart, the highest participation employment sectors in the County tend to produce the lowest wages for its workers, with hospitality being the lowest paid sector but one of the top three employment sectors. Hospitality workers on average are making less than \$30,000/year, and other service sectors have lower incomes as well including administrators and educators. As part of the Bowen study, several employment sectors were interviewed. Teachers that responded to the survey stated they barely earn enough to afford rent and that they must work additional jobs and/or live with roommates to afford housing in Beaufort County.

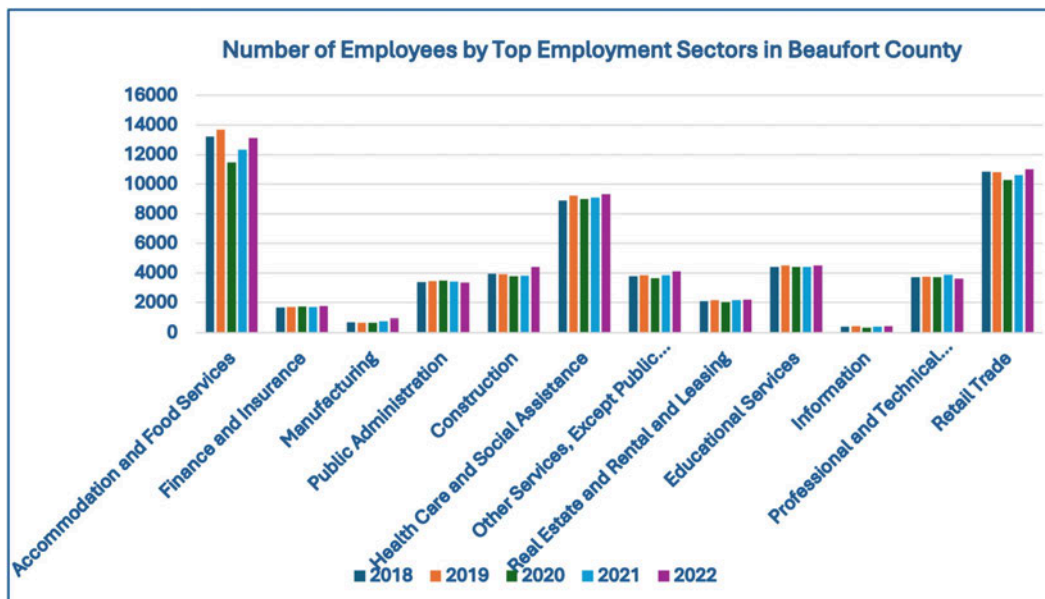
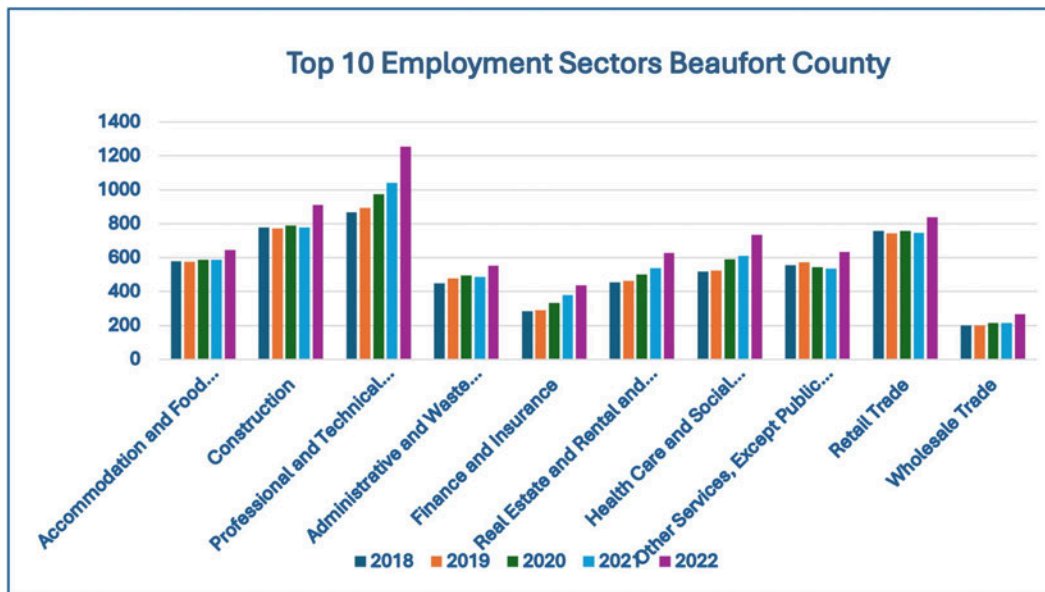
Teachers also stated that wages have not increased at the same rate as housing and utilities, demonstrating the affordability problem is especially pronounced for beginning teachers, who have a low starting salary. As indicated in the Beaufort Chamber chart, average salaries for those in the education sector was just over \$40,000 in 2022.



Based on the County's and the US Department of Housing and Urban Development's definition of affordable housing, a household that spends more than 30% of their income on housing - or more than three times their annual salary on buying a home, they are considered "cost-burdened". The following charts from the National Housing Conference's Paycheck to Paycheck analysis indicates that households need to earn over \$172,000 to afford the average home in Beaufort County and over \$46,000 to afford an average 3-bedroom apartment. The chart also highlights a significant gap between what income is needed and what - for example - employees in the service sector actually earn. None of the tourism positions listed below can afford a 2 bedroom apartment based on this analysis.

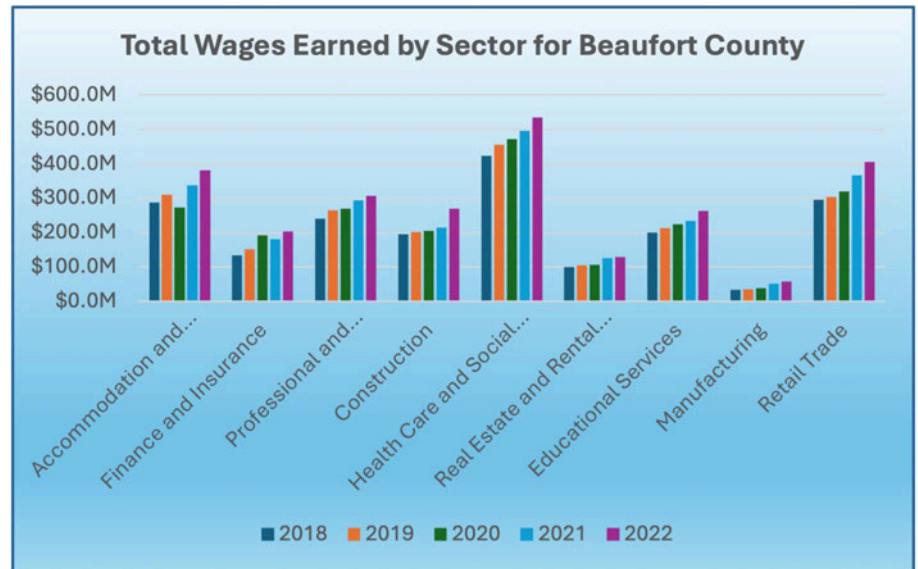


The 2024 Lowcountry Community Indicators Report - created by the Lowcountry Council of Governments (LCOG) in partnership with the Community Foundation of the Lowcountry (CFL) - is a centralized community resource highlighting key community indicators and trends in the lowcountry region including Beaufort County and its submarket municipalities within the County. The chart below created from the data in the report shows the top 10 employment sectors in Beaufort County and their establishment growth over a five-year period from 2018-2022. Accommodation and Food Service continues to be one of the number one employment sectors – employing over 13,000 residents - along with Retail, and Health Care, Professional Service, and Construction as additional top employment sectors.



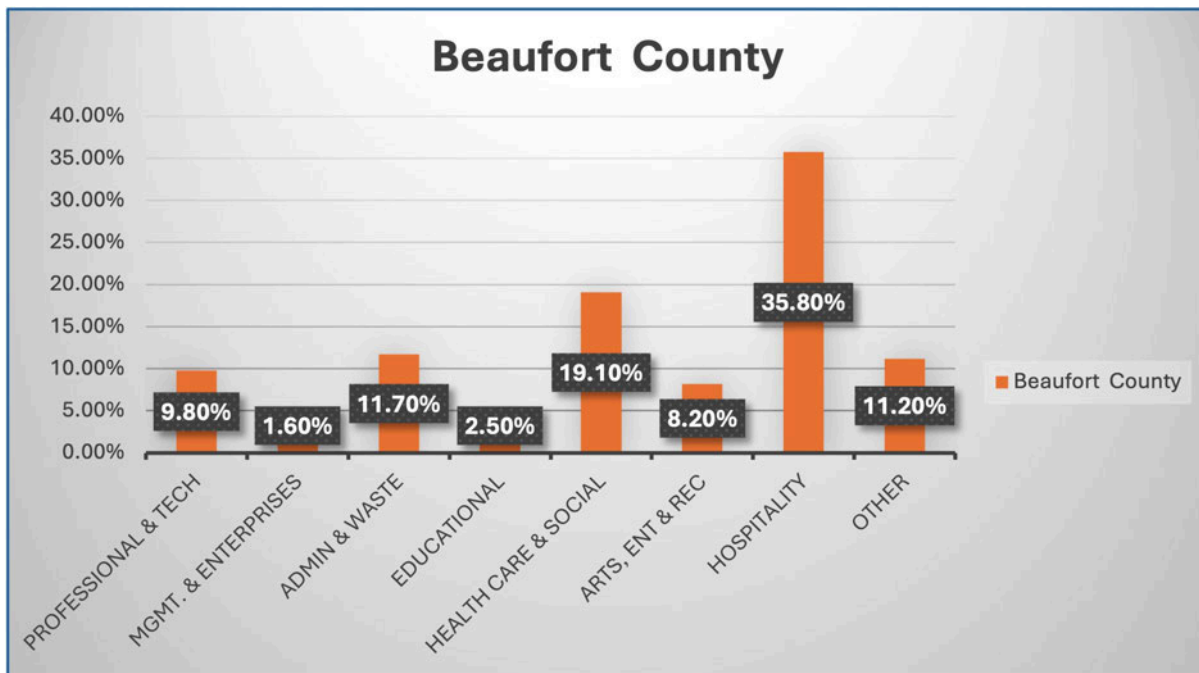


In addition to the significant number of individuals employed within these service sectors as highlighted above, the recent Beaufort Area Chamber of Commerce 2024 Data Dashboard report below indicated overall hospitality as one of the largest grossing employers in the County with Accommodations and Hospitality creating close to \$400M in area earnings just third to Health Care at \$500M and Retail at \$400M. A significant percentage of the County's economy comes from these three service sectors.



The recent Beaufort Area Chamber of Commerce 2024 Data Dashboard report indicated overall hospitality as one of the largest employers in the County.

### Service Sector Employment Breakdown: over 35% of the workforce is in Hospitality.



The US Bureau of Labor Statistics May 2023 employment data below shows the average salary for the Beaufort Hilton Head area for overall leisure and hospitality which included food service and accommodations. The average salary based on the most recent data reported for the area was \$29,872, which was slightly higher than 2021 by 5.7%, but is nowhere near enough in annual wages to afford the current housing options within the County.

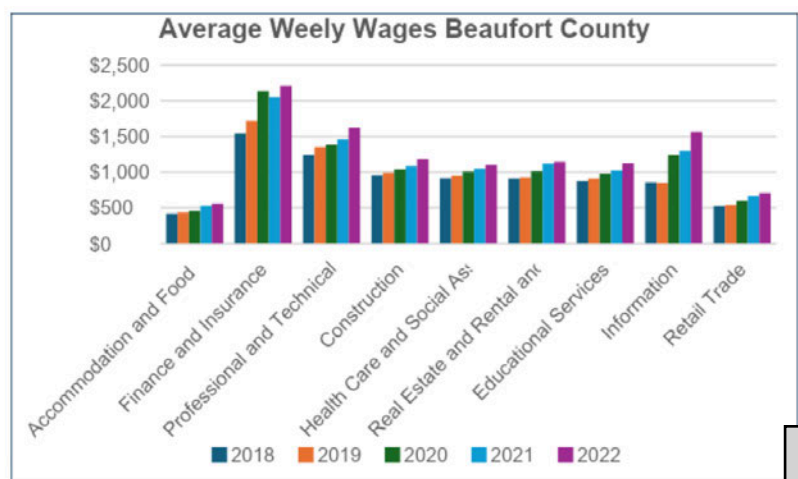
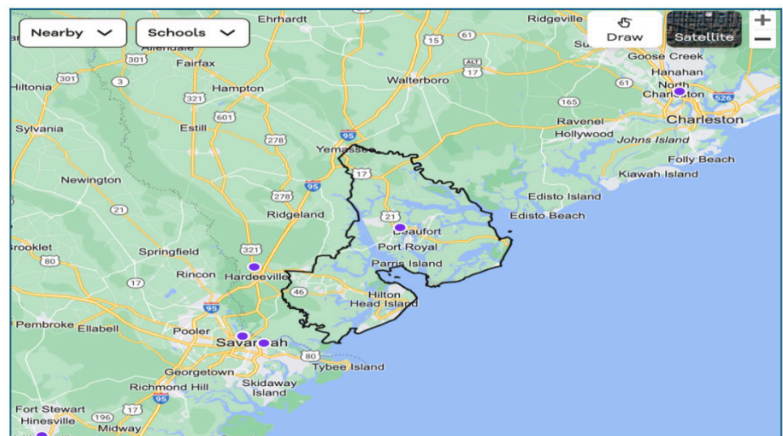
**Private, 1026 Leisure and hospitality, Beaufort County, South Carolina**

**Annual averages 2021 - 2022 , All establishment sizes**

**Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics**

Summary Change Table <a href="#">Hide</a>					
From: <input type="text" value="2021"/>	Annual Establishments	Annual Average Employment	Total Annual Wages	Annual Average Weekly Wage	Annual Wages per Employee
To: <input type="text" value="2022"/>					
2021 Levels	738	14,934	422,047,609	\$543	\$28,260
2022 Levels	765	16,069	480,014,187	\$574	\$29,872
Level Change From 2021 to 2022	27	1,135	57,966,578	\$31	\$1,612
Percent Change From 2021 to 2022	3.7%	7.6%	13.7%	5.7%	5.7%

Based on the US Department of Housing and Urban Development, a family should spend no more than 30% of the monthly salary for rental housing and no more than three times their annual salary of on homeownership to not be considered "cost-burdened". As mentioned earlier, the County also follows this threshold for their housing initiatives and programs. Based on this standard, a person working in the leisure and hospitality sector should spend no more than \$89,610 on buying a home and no more than \$746.80 for rent, yet - based on recent housing market data -there are few if any available options at these price points, with long waiting lists for government subsidized or assisted housing further depleting affordable options for workers. When conducting a search on Realtor.com for apartments in Beaufort County at \$750/month rent, only one available listing was found from WODA Cooper - an affordable housing developer who has been working in the region for the past few years. The only other options in this price range were found outside of Beaufort County.



As show on the previous page's Average Weekly Wage Chart Accommodation and Food Services incomes have remained relatively stagnant. The LCOG indicators report on average weekly income for this sector is about \$500/week compared to other major employment sectors in the region. With these low incomes and no affordable rental options, workers are forced to commute even further outside of the County to seek housing options.

## Employment Analysis:

The 2018 Bowen Housing Needs Assessment highlighted that key workforce sectors struggle to identify affordable housing options in the market for their employees. The area's strongest sector is tourism and entertainment/hospitality whose workers are the greatest housing cost -burdened, due to lower salaries. As mentioned in the study, this sector depends on workers that can live on a lower wage. Therefore, a big challenge for these employees is the lack of affordable housing options throughout Beaufort County. There are few affordable housing choices across the County especially near job centers, therefore employees are forced to commute longer distances to employment opportunities. Interviews with local sources in the 2018 study, indicated the lack of affordable and moderate-income housing in the area is a deterrent to new companies interested in moving to the area, due to the uncertainty of available housing for their employees.

A recent market analysis conducted by Ronald Brown Research & Analysis for an affordable housing project submitted to the state for low-income housing tax credit project (LIHTC) for Beaufort County indicated a large percentage of workers commuting from several other counties to work in the area. The study highlighted that hospitality and service sector employers depend on low to moderate income workers who may have to drive longer distances for housing options. As noted in this chart from the Analysis, several workers are commuting from as far as Charleston and Dorchester Counties as well as Chatham County, GA. Adjacent county Jasper County has the greatest numbers of commuters. As Jasper County continues to grow many of these worker may choose to work in Jasper verses Beaufort as more jobs and businesses come to this area where many workers already live, which could mean a decline in workers for Beaufort County businesses.

Working in Beaufort County 41,534

Where Beaufort County residents are commuting to:

Charleston County, SC	2,909
Chatham County, GA	2,849
Jasper County, SC	2,664
Richland County, SC	1,612
Greenville County, SC	1,214
Lexington County, SC	868
Horry County, SC	676
Berkeley County, SC	549
Spartanburg County, SC	495
Elsewhere	6,472

Where Beaufort County workers are commuting from:

Jasper County, SC	4,105
Chatham County, GA	1,901
Charleston County, SC	1,708
Dorchester County, SC	1,129
Hampton County, SC	901
Berkeley County, SC	858
Colleton County, SC	801
Orangeburg County, SC	706
Richland County, SC	693
Elsewhere	7,665

## Cost Burdened:

As part of the Bowen report analysis, researchers conducted extensive outreach and analysis on the existing availability of both subsidized and unsubsidized affordable housing and determined at the time there were virtually no vacant units among the surveyed Tax Credit and government subsidized rental product that is intended to provide affordable housing in the County, and a relatively small inventory of for-sale product was priced under \$200,000.

As a result, many lower-income households have to choose from various market-rate rental or higher priced for-sale housing alternatives that are not considered affordable to many of these households. Households that are “cost-burdened” (typically paying 30% or more of their income towards housing costs) or “severe cost-burdened” (typically paying 50% or more towards housing costs) often find it difficult paying for both their housing and meeting other financial obligations. The same study conducted by T Ronald Brown in 2023 indicated close to 50% of area’s renters are considered cost-burdened.

**Table 17 - Household Income, Renter Households**

Income	Overburdened Renters			
	Number	Percent	Number	Percent
Up to \$10,000	443	9.3	201	9.2
\$10,000 - \$19,999	337	7.1	303	13.9
\$20,000 - \$34,999	466	9.8	428	19.7
\$35,000 - \$50,000	730	15.4	574	26.4
\$50,000 - \$75,000	901	19.0	473	21.7
\$75,000 - \$100,000	790	16.6	126	5.8
\$100,000 and over	1,087	22.9	71	3.3
Total	4,754		2,176	

Source: 2016 to 2020 American Community Survey; T.Ronald Brown: Research & Analysis

Even the most recent US Bureau of Labor Statistics report for the Beaufort Area for May 2023 , indicates employees in the Accommodations and Food Service sector are severely limited in housing choices based on median incomes. The following chart indicates what these employees in these key positions could afford without being considered cost-burdened. The chart shows both affordable rental and ownership ranges for each of these positions based on spending no more than 30% of their income on housing. The challenge for these employees is there are few housing options in the area within these price ranges, which will be highlighted in more detail in the Housing Market Chapter of this Housing Impact Analysis.



Select Accommodations and Food Service Positions				
May 2023 Occupation HHI-Bluffton-Beaufort Area	Hourly MEDIAN	Annual MEDIAN	Affordable Rental (30% Income)	Affordable Ownership (3x Annual Salary)
Food Service Managers	\$ 30.26	\$ 62,930.00	\$ 1,573.25	\$ 188,790.00
Lodging Managers	\$ 37.06	\$ 77,090.00	\$ 1,927.25	\$ 231,270.00
Chefs and Head Cooks	\$ 29.33	\$ 61,000.00	\$ 1,525.00	\$ 183,000.00
Cooks, Restaurant	\$ 16.59	\$ 34,510.00	\$ 862.75	\$ 103,530.00
Bartenders	\$ 8.78	\$ 18,270.00	\$ 456.75	\$ 54,810.00
Waiters and Waitresses	\$ 9.59	\$ 19,950.00	\$ 498.75	\$ 59,850.00
Dining Room and Cafeteria Attendants and Bartender Helpers	\$ 11.12	\$ 23,130.00	\$ 578.25	\$ 69,390.00
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	\$ 12.75	\$ 26,520.00	\$ 663.00	\$ 79,560.00
Landscaping and Groundskeeping Workers	\$ 17.56	\$ 36,520.00	\$ 913.00	\$ 109,560.00
First-Line Supervisors of Housekeeping and Janitorial Workers	\$ 21.93	\$ 45,620.00	\$ 1,140.50	\$ 136,860.00
Maids and Housekeeping Cleaners	\$ 14.65	\$ 30,470.00	\$ 761.75	\$ 91,410.00
Baggage Porters and Bellhops	\$ 11.78	\$ 24,510.00	\$ 612.75	\$ 73,530.00
Concierges	\$ 20.05	\$ 41,700.00	\$ 1,042.50	\$ 125,100.00
Hotel, Motel, and Resort Desk Clerks	\$ 14.09	\$ 29,300.00	\$ 732.50	\$ 87,900.00
*bls.gov				
<i>*Note these estimates are based on a one-person income</i>				

At the time of the Bowen study, among Beaufort County's renter households, a total of 9,370 (47.4%) were cost burdened and 3,883 (19.6%) were severely cost burdened. In South Carolina, these ratios are 45.7% and 23.3%, respectively. A total of 15,463 (33.5%) owner households were considered cost burdened, while 6,613 (14.3%) were severely cost burdened. This extensive study also highlighted that few new affordable housing units have been built within the County. The greatest shares of severe cost burdened renter households were in the City of Beaufort (21.8%) and the Northern Unincorporated (21.6%) submarkets, while the greatest share of severely cost burdened owner households are within the Town of Hilton Head Island (18.8%) and City of Beaufort (16.0%) submarkets.

As such, a key recommendation from the Bowen report was to preserve the existing stock of affordable housing and expand affordable housing alternatives as critical for the growth of Beaufort County's future housing plans. Early 2024, the County committed funding to the Coastal Community Development Corporation (CCDC), a new nonprofit focused on workforce housing to support increased preservation of affordable rental units.

With limited new affordable housing developments within the county leading to a community starved of affordable housing options for many years, preservation will be critical as the County plans for new affordable developments moving forward.



Based on analysis during the Bowen report - which identified and personally surveyed 60 multifamily rental housing projects containing a total of 5,963 units within the overall county, the last government subsidized affordable housing project was built before 2017. These projects have an overall 97.6% occupancy rate, indicating that there is limited availability among the multifamily rental housing supply and overwhelming demand from the community. The non-subsidized units (market-rate and non-Tax Credit) are 97.2% occupied, while the government subsidized units are 100.0% occupied. With 139 of the 142 vacant units identified in the market among the market rate supply, there were virtually no vacancies among affordable rentals that served low-income households through programs such as the Low-Income Housing Tax Credit (LIHTC) program or a government subsidy.

Government Subsidized			
Year Built	Projects	Units	Percent Share
Before 1970	-	-	-
1970 to 1979	7	421	51.8%
1980 to 1989	5	228	28.1%
1990 to 1999	2	68	8.4%
2000 to 2005	1	35	4.3%
2006 to 2010	-	-	-
2011 to 2015	1	60	7.4%
2016	-	-	-
2017*	-	-	-

\*As of December

Based on Bowen interviews at the time with area apartment managers, many affordable rental properties maintain long wait lists, and a recent interview with staff at Beaufort County Health and Human Services indicated that they have over 1,000 individuals seeking housing at any given time. At the time of the study, the Beaufort Housing Authority indicated that over 1,100 families were on their waiting list for housing within the County. Since the Bowen study was completed, no additional low-income housing tax credit apartment communities have been approved within the County.





## Housing Needs for Employees:

During the Bowen study, employers were asked to rank the degree of need (low, moderate and high) for housing for their employees in terms of product type. Respondents reported that the highest need based on product type are single-family homes (42.1%), multifamily apartments (31.6%) and duplex/townhomes (22.2%). It's notable that employers ranked the lowest need of housing by product type as mobile homes (63.2%), short-term/seasonal housing (47.4%) and dormitories/shared living (33.3%).

Employers were also asked to rank the degree of need for housing in terms of product pricing. Respondents reported that the highest need based on product pricing are entry level/workforce for-sale housing (below \$150,000), affordable rental housing (under \$750/month) and moderate market-rate rental housing (\$750-\$1,250/month) as the next greatest need. It's notable that employers ranked the lowest housing priority need by product pricing as higher-end market-rate rental housing (above \$1,250/month), higher-end for-sale housing (above \$250,000) and moderate for-sale housing (\$150,000-\$250,000) and the next greatest need.

In terms of addressing housing needs for employers in Beaufort County, employers were also asked to rank the level of importance for any future government housing programs, policies, or incentives that could be implemented to assist employees with the accessing affordable housing. Respondents ranked the most important focus areas as new housing development/redevelopment (57.9%), renter assistance (38.9%) and housing assistance for public employees (36.8%).



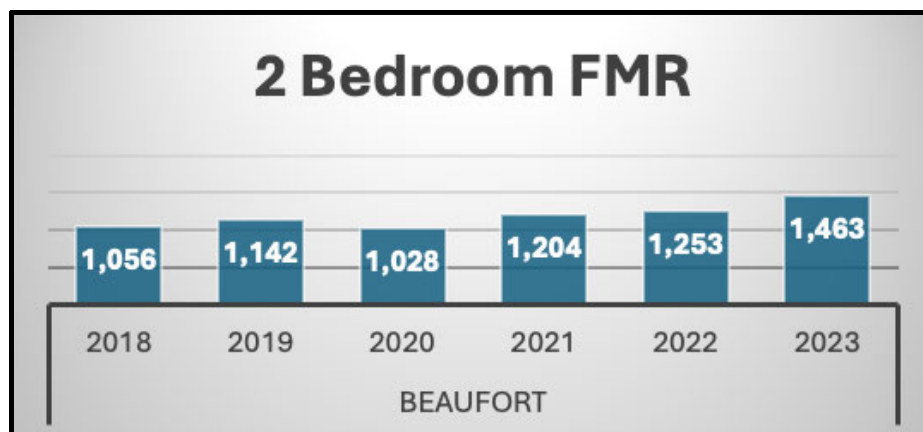
# Housing Market Analysis/Conditions

## Rental Market

The 2018 Bowen study indicated the lack of housing was most prevalent among housing that serves moderate-income households, (generally earning between 80% and 120% of AMI) and lower-income household segments (generally earning below 80% of AMI). While vacancy rates were low among all rental housing segments, there were very few vacancies among product that serves lower-income households through Tax Credit projects that had an overall vacancy rate of just 0.3% and government-subsidized product - with a vacancy rate of 0.0%. As mentioned earlier, according to the Beaufort County Housing Authority, the wait list for households to get a Housing Choice Voucher consists of approximately 1,100 households.

Feedback from area stakeholders and employers interviewed as part of the Bowen study indicated that affordable rental housing for low- to moderate-income households and - in particular - the service industry (i.e. retail, hospitality, restaurant workers, etc.) and public service workers (i.e. police officers, fire fighters and teachers) should be an area of focus for future housing development. The Bowen report also recommended that future housing plans address affordable rental housing for households with incomes between 80% and 120% of AMI and lower-income households earning up to 80% of AMI. Despite these recommendations, post 2018, little affordable housing has been added to the market over the past five years due to the lack of new tax credit or subsidized projects being approved, and the loss of existing naturally occurring affordable rental housing (NOAH), creating an even bleaker outlook for Beaufort County's affordable rental market today.

According to the recent Lowcountry Community Indicators Report by LCOG, fair market rent for a 2-bedroom apartment was \$1,463 in 2023 (which requires at least \$58,520 annual salary (approximately \$28/hour) – a 39% increase since 2018 and a 17% increase just since 2022.



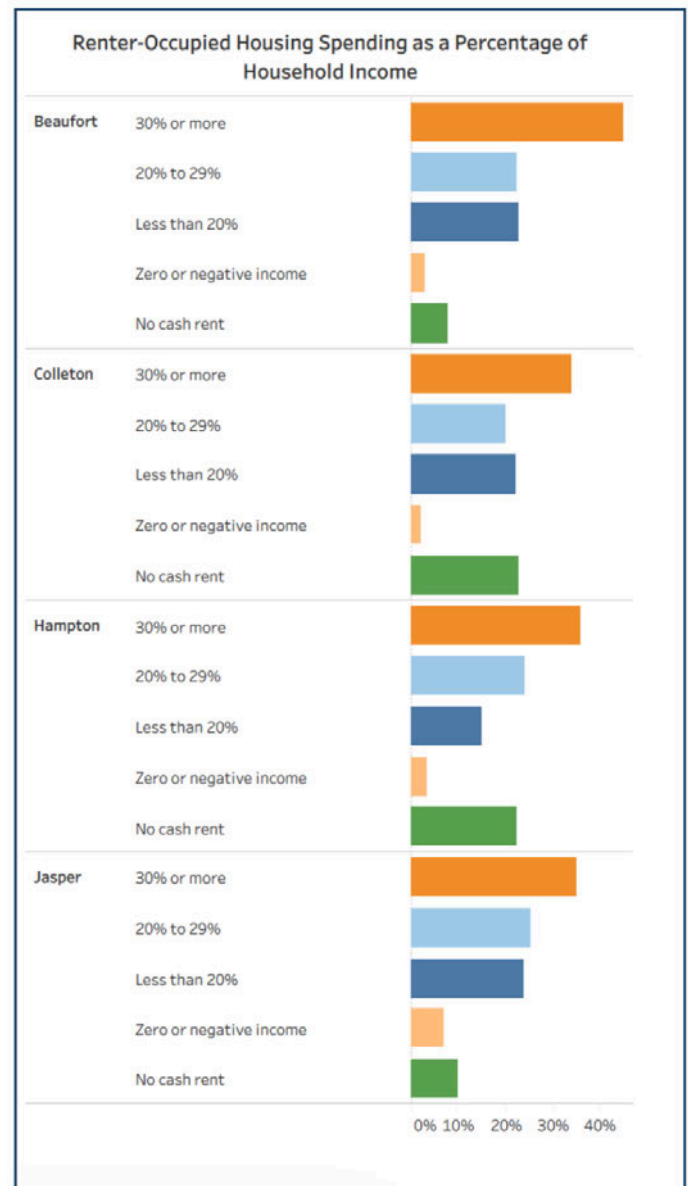


Over 64% of all rental units are priced above \$1,000/month, and 45% of renters in Beaufort County are cost-burdened and spending more than 30% of their monthly income on housing – the highest in the four-county region including Colleton, Hampton, and Jasper Counties. Furthermore, a December 2023 Market Study for a Low-Income Housing Tax Credit (LIHTC) development in the Town of Bluffton found that the median renter income for Bluffton and Beaufort County was \$36,889 and \$49,177 respectively, between \$16,000 and \$9,000 less than what is needed to afford a 2-bedroom FMR unit in Beaufort County.

Compared to other adjacent counties, the chart to the right shows Beaufort County as the most cost-burdened community in the region based on the recent LCOG report, with Jasper and Hampton Counties not far behind.

The same 2023 Market Study of a Low-Income Housing Tax Credit (LIHTC) development in Bluffton found that – of the eligible renter households in that project market area – as many as 91.9% of the 40% AMI renter households, 78.6% of the 60% AMI renter households, and 57.4% of the 80% AMI renter households are cost-burdened and hence would benefit from affordable rental options. The study also found that by 2026 there will be a need of approximately 1,844 new units of affordable rentals – at the 40%, 60%, and 80% AMI ranges - in the Bluffton area and that the proposed 120-unit Livewell Terrace Apartments project will satisfy only 6% of that total demand. Two LIHTC projects currently underway in the County, Garden Oaks and Pintail Pointe, will provide approximately 370 affordable units, yet not nearly enough to meet growing demand.

In the 2024 recent LIHTC round no Beaufort County projects were submitted for final consideration.



While 2,234 affordable rental units have been created using LIHTC financing since 1988, additional funding sources will need to be leveraged in order to scale up affordable development to meet the growing demand in the Beaufort County region. South Carolina State Housing Finance did not offer a tax credit round in 2023 and will be accepting submissions for 2024 at the end of May. Beaufort County should stay involved in the 2025 QAP process to promote the county as a high demand area as the need for more housing continues to grow.

The Tischler Bise study revealed, Beaufort County will have 41,257 new permanent residents and 18,962 new housing units by 2029 – a 22% and 20% increase from 2019. However, only 25% of those new housing units are projected to be multi-unit structures which are more capable of housing this influx of new residents in higher-density developments. This is a concerning trend nationwide where multi-family affordable rentals are drastically underdeveloped. Beaufort County is no different where 2 Unit and 3-4 Unit residential structures saw a 59% and 17% decline in production from 2010 to 2022, and there has been only a marginal increase in production of 2% and 4% respectively from 2020 to 2022.

The following chart from the LCOG Indicators report highlights these discrepancies between single family and multifamily developments in Beaufort County since 2000.

		2000	2010	2020	2022	Change 2000-2010	Change 2010-2020	Change 2020-2022
Beaufort	1-Unit, detached	34,893	53,717	62,665	63,327	53.9%	16.7%	1.1%
	1-Unit, attached	3,279	4,782	6,469	5,296	45.8%	35.3%	-18.1%
	2 Units	1,052	1,486	617	627	41.3%	-58.5%	1.6%
	3-4 Units	2,759	3,314	2,749	2,848	20.1%	-17.0%	3.6%
	5-9 Units	2,956	5,508	5,201	5,163	86.3%	-5.6%	-0.7%
	10-19 Units	1,443	3,186	3,903	3,972	120.8%	22.5%	1.8%
	20 or more Units	5,035	7,796	9,522	8,357	54.8%	22.1%	-12.2%
	Mobile Homes	9,001	9,289	9,660	9,396	3.2%	4.0%	-2.7%

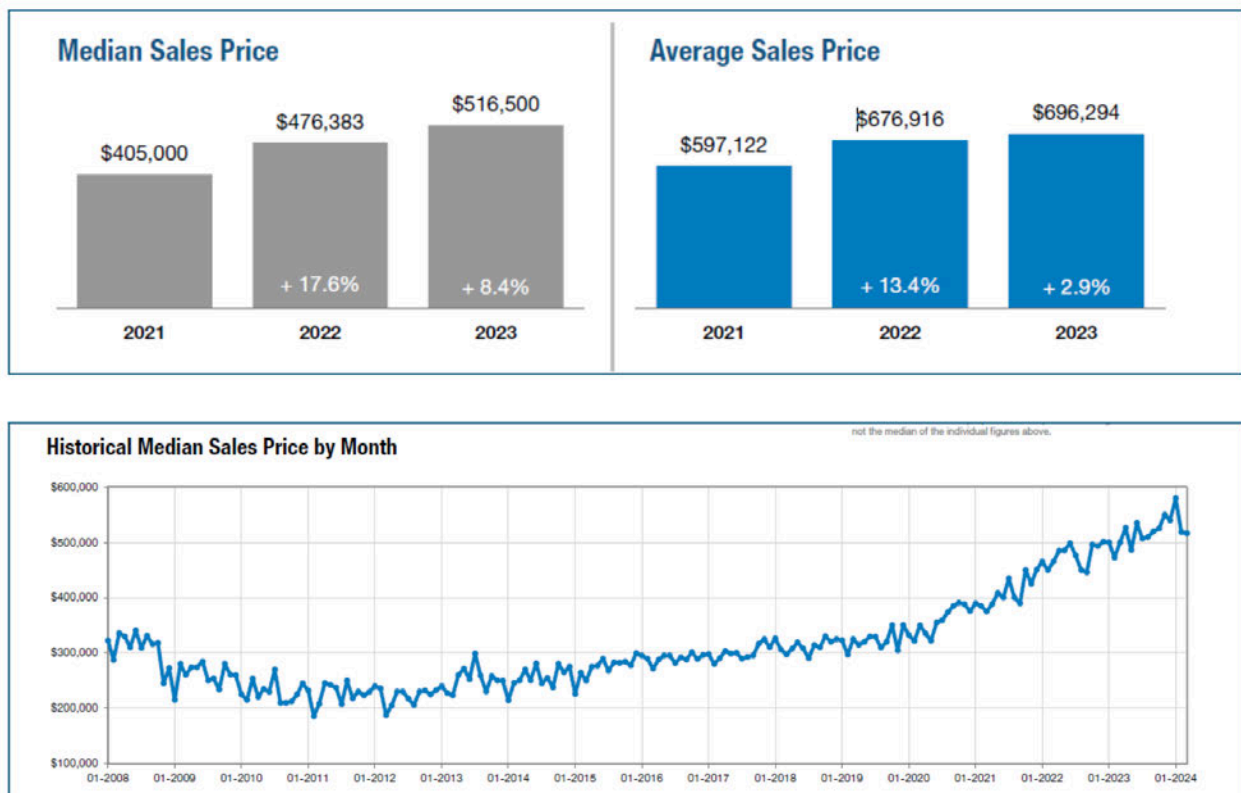
(<https://www.lowcountrycommunityindicators.org/>)



## Homeownership

The 2018 Bowen study also pointed out at the time of the report that nearly three-fourths (70.4%) of the available for-sale product was priced at \$300,000 or higher, yet this price point is not affordable to half of the households in the county. At the time of the study, there were approximately 386 available for-sale housing units priced between \$150,000 and \$250,000, yet the number of households that would have enough income (\$50,000 to \$74,999) to afford this price range was estimated to grow to over 800 households over the five years. Therefore, the existing inventory of product priced between \$150,000 and \$250,000 was insufficient to meet the projected need in 2018, and this gap in available affordable housing stock has widened in the region post-pandemic.

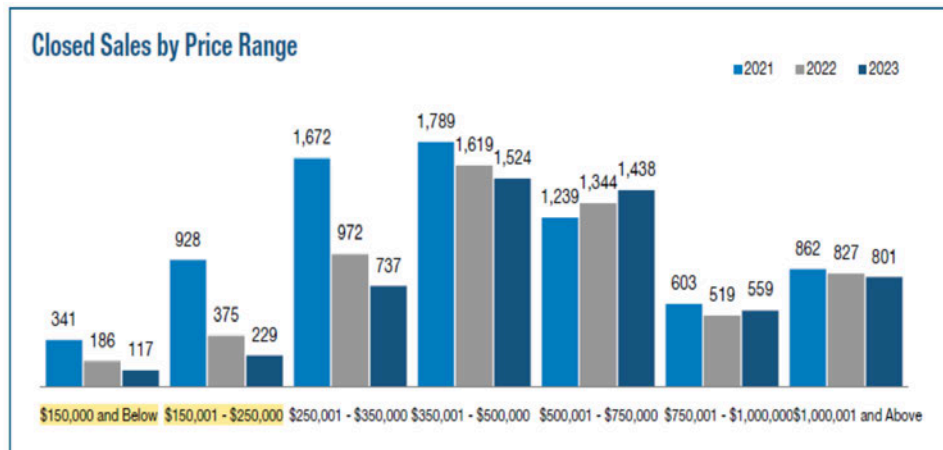
The Hilton Head Area Realtors Association, which tracks the county's housing market trends, estimated - as part of their 2023 Year-End Market Trend Analysis - a continued increase in the costs of homeownership for the Beaufort County region largely due to a 2-decade high mortgage rate increase – hovering around 7%, a historically-low housing inventory, and a continuing trend of increased sales prices. As shown below, the overall median sales price increased 8.4 percent to \$516,500 for the year – with detached home prices up 4.5 percent and attached home prices up 15.3 percent from 2022. Average sales prices, indicated in the chart below, were close to \$700,000 for the County. The Historical Median Sales price by month also shows this continued trend in escalating home prices.



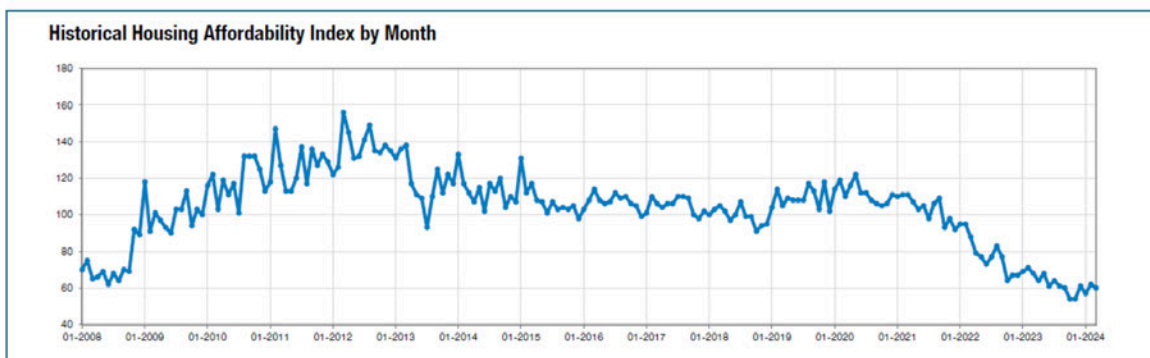
The number of housing units that sold below \$250,000 continued to decline in 2023 – consistent with a trend since 2021 – indicating a prolonged deficit in the affordable housing inventory for Beaufort County. The above graph shows that prices have continued to increase rather than stabilize. In the Bowen Housing Gap Estimates, they predicted a demand for a variety of product at a wide range of affordability levels, including housing for both low- and high-income households, from both rental and for-sale product. Without the introduction of a sufficient number of housing units, the already limited availability of housing units will become scarcer.

The Closed Sales Chart shows a 65% and 75% decline in homes sold below \$150,000 and between \$150,001 and \$250,000 – respectively - since 2021, which is consistent with the Bowen study predictions due to limited inventory below \$300,000.

Recent data from March 2024 shows little improvement in the affordable sales inventory from March 2023 with no change in the number of new single-family listings at \$150,000 or below and only a 5 unit increase for those properties listed between \$150,001 and \$250,000.

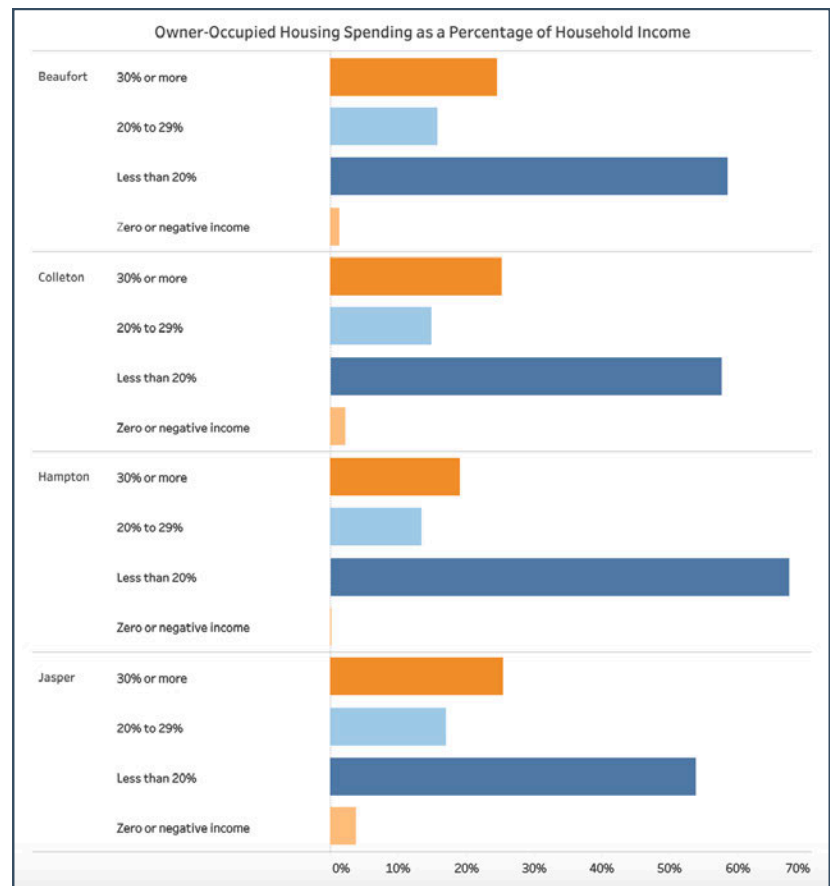
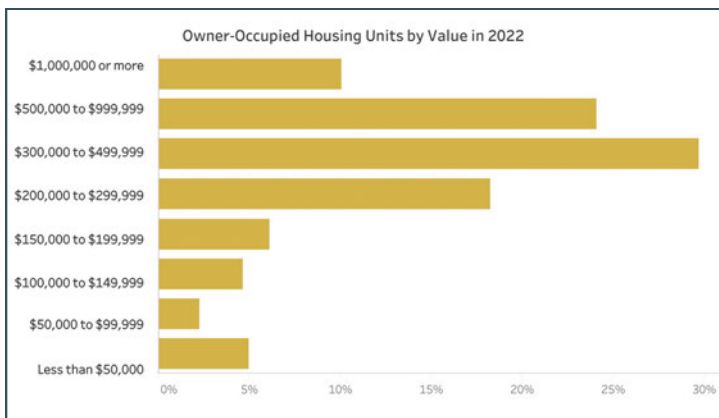


In addition, the Housing Affordability Index – a measure of the necessary median household income to qualify for the purchase of median-priced home in a region – has continued to decline for Beaufort County since 2022. With a higher number meaning greater affordability, the Index is currently at 60 - a 12% decline from last year, a 32% total decline since 2022, and a notable decline even from the time the Bowen study was completed in 2018.



2022 data from the Lowcountry Council of Governments also confirms that 1 in 4 Beaufort County homeowners are cost-burdened for housing - spending 30% or more of their monthly income on housing-related expenses – while 70% of those homeowners have monthly mortgages of \$1,500 or more. Meanwhile, median household income decreased by .5% in 2022 – when adjusted for inflation. Jasper and Colleton counties are not far behind in terms of homeowners that are cost-burdened as both are also close to 30% of households spending more than 30% of their income on housing. This report also shows very few ownership opportunities below \$200,000 compared to higher end homes within Beaufort County as highlighted below.




Despite the paucity of affordable homeownership opportunities, March 2024 key data metrics below shows overall inventory of homes on the market in Beaufort County increased 45% with months' supply of inventory increasing by 55% - to 3.4 months – since March 2023, a promising upward trend in overall housing stock that could drive down home prices in the future as supply grows.



Key Metrics	Historical Sparkbars	03-2023	03-2024	Percent Change	YTD 2023	YTD 2024	Percent Change
Inventory of Homes for Sale		1,016	1,469	+ 44.6%	--	--	--
Months Supply of Inventory		2.2	3.4	+ 54.5%	--	--	--



Additional data from the Beaufort Jasper Realtors Association (BJRA) indicates that pricing continues to escalate even with an increase in inventory. The following charts show increased median sales price up +1.8% from March 2023 to 2024, the average sales price up +4.5% for the same period in the first quarter of 2024, and the affordability index declining 6.2% over the same period. Pending sales for March 2024 were also up 18.7% from 2023. So, despite a growth in inventory and increased sales it is mainly higher priced homes selling with few below the \$200,000 sales price.

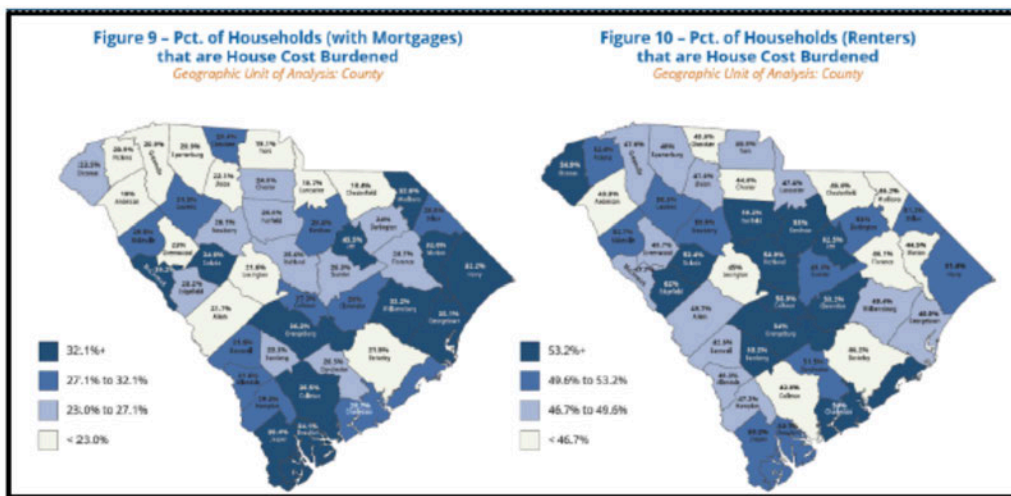
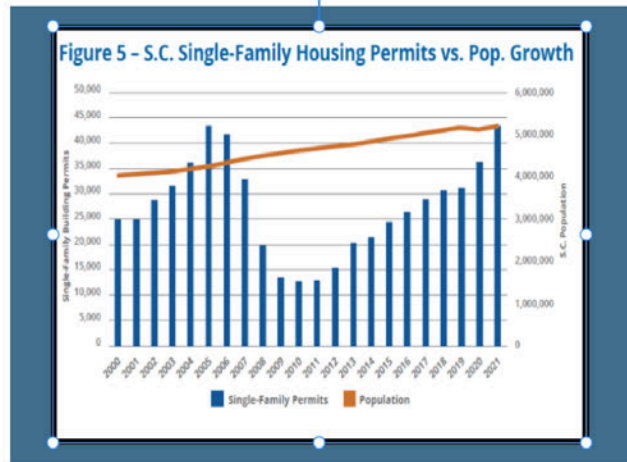
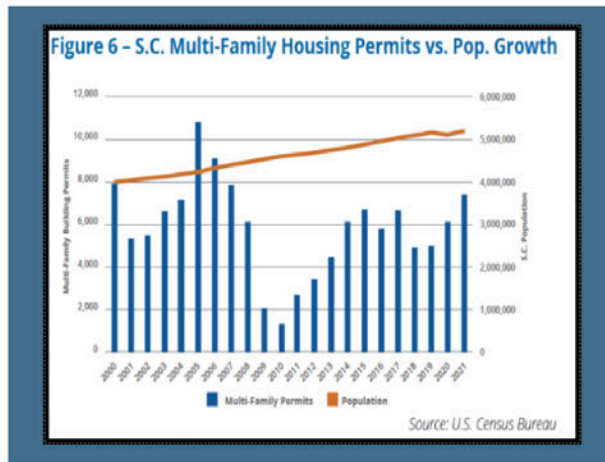
Key Metrics	Historical Sparkbars			03-2023	03-2024	Percent Change	YTD 2023	YTD 2024	Percent Change
	03-2022	03-2023	03-2024						
Median Sales Price				\$390,000	\$396,990	+ 1.8%	\$385,000	\$400,000	+ 3.9%
Average Sales Price				\$460,192	\$465,126	+ 1.1%	\$457,432	\$477,947	+ 4.5%
Housing Affordability Index				81	76	- 6.2%	82	76	- 7.3%

## Housing Market Conditions

Although the South Carolina population continues to have strong growth, building has not kept up. The 2023 Palmetto State Housing Study published by SC State Housing indicated that a decade of underbuilding has culminated in a shortage of housing inventory. South Carolina's population has grown steadily at an average annual rate of roughly 1.2% from 2002 to 2021 (compared to 0.8% for the overall US), and in 2023 its population grew the fastest in the nation – at a 1.7% increase from the previous year. Yet, the average annual growth rate in the number of new housing permits in South Carolina dropped by nearly half after the Great Recession of 2008.

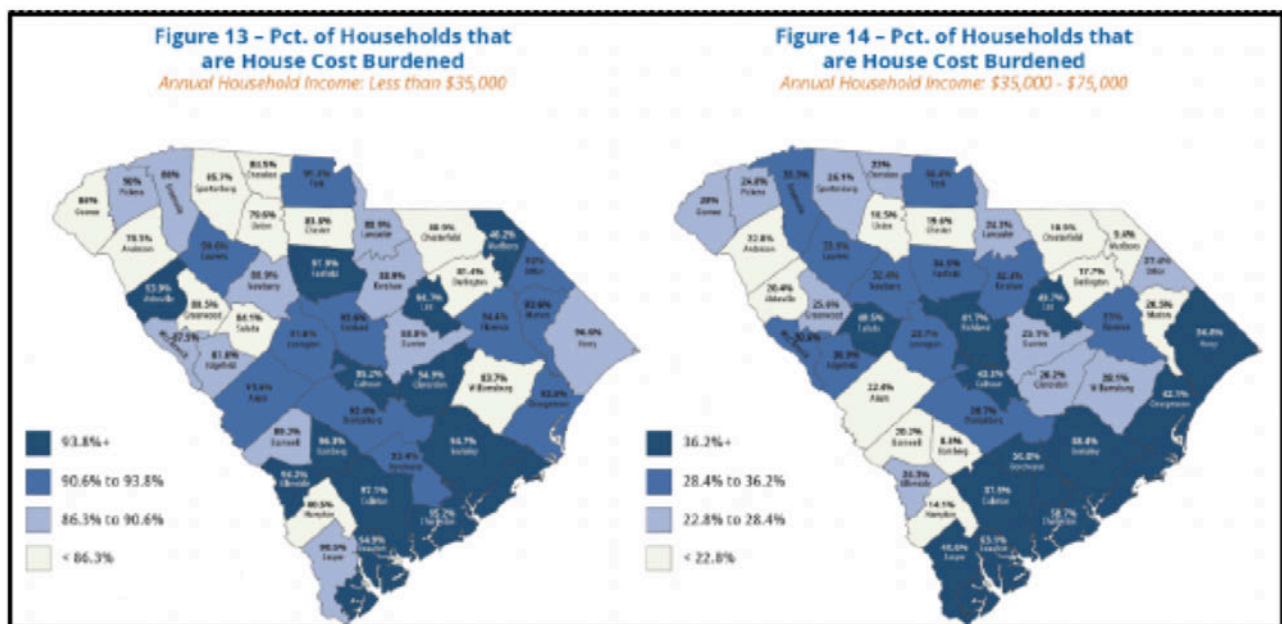
The decline includes both single and multi-family housing, thereby creating gaps in the supply and demand for housing and escalating the cost of housing due to the shortage of supply. The lack of housing inventory in South Carolina is especially pronounced among lower price points. Although a lack of demand in the immediate aftermath of the Great Recession helped temporarily increase the availability of entry-level homes, the number of homes sold in South Carolina for less than \$100,000 has decreased by 14.8 percent each year since 2014. (2023 Palmetto Study) The decrease in supply is most pronounced in coastal regions of South Carolina. In 2022, the percentage of homes sold in South Carolina for under \$100,000 fell below 5 percent for the first time. The 2023 Palmetto Housing Study, as shown in the charts below, reveals that South Carolina's housing market is imbalanced due to high demand and low inventory levels. This imbalance has resulted in affordability challenges for many South Carolinians.

As mentioned earlier, housing affordability is usually measured by examining the extent to which families are considered to be housing cost-burdened, therefore approximately 50 percent of renting households and 25 percent of households with a mortgage are housing cost-burdened in South Carolina. Examining housing cost burdens by county reveals that renters are most likely to be cost-burdened in the Midlands and coastal regions of South Carolina. By contrast, households with mortgages are most likely to be cost-burdened in the Pee Dee and coastal regions, as shown in Figures 9 and 10. On average, housing cost burdens across the state are higher for renters than they are for households with mortgages.



Housing affordability is often considered to be a challenge that is either mostly or exclusively concentrated among households with lower income. Approximately 90% of South Carolina's lower income households, defined as those earning less than \$35,000 annually are estimated to be housing cost-burdened based on the 2023 Palmetto Housing Study. However, in South Carolina there is also a significant population base of middle-income households that also face affordability challenges. Specifically, this study estimates that more than one-third (34.5%) of households earning between \$35,000 and \$75,000 annually are also housing cost-burdened by traditional measures. Existing statewide workforce housing initiatives are often designed for this population.

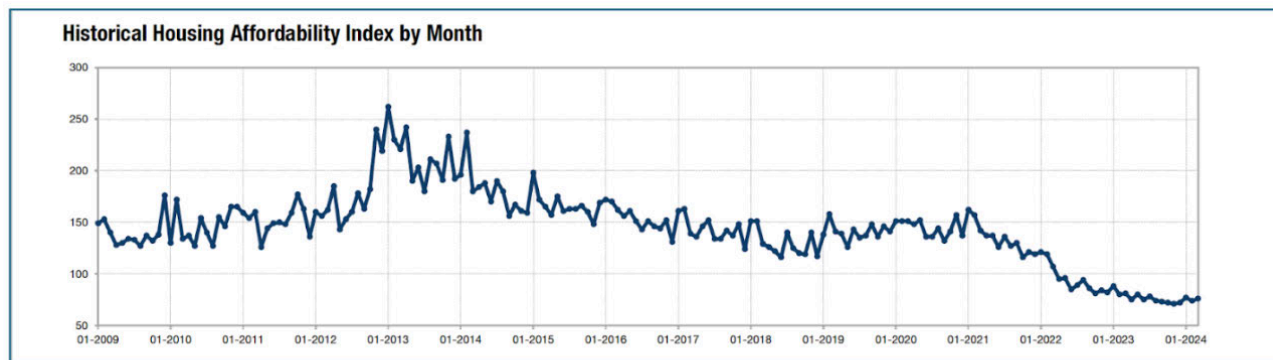
The cost burden for this segment of the population is especially high in coastal South Carolina as shown in Figures 13 and 14. The data demonstrates that housing affordability is nearly a universal challenge for lower-income and working-class families and households. Policies directed at improving housing affordability should also include attainable housing programs and new inventory for middle-income families -including individuals often employed as teachers, first responders, and health care support workers.





Escalating real estate costs are not the only barrier to homeownership. Increased mortgage rates continue to limit affordable home buying opportunities for families. Since August 2023, interest rates have risen to as high as 8% depending on the loan type, the amount of down payment provided and also takes into consideration a varying credit score between 580-800. These variables make home buying more difficult for lower income households that have limited downpayment and lower credit scores.

The affordability index (the lower the number the less affordable a market) for Beaufort and Jasper counties collectively continues to decline making the impact on housing options for Beaufort workers even more challenging as neighboring counties are also seeing a decline in affordability. The chart below shows significant regional decline in affordability even since the 2018 Bowen study. As mentioned earlier many workers commute from Jasper County to work in Beaufort, yet housing pricing are increasing in that market as well creating a broader regional housing crisis.



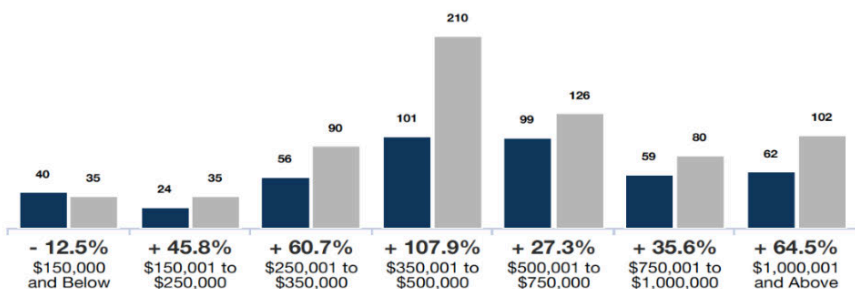
*\*Beaufort-Jasper County Realtors Association (BJRA)*

Even more telling in the loss of regional affordability is the March BJRA Housing Supply Overview which indicated that for the 12-month period spanning April 2023 through March 2024 pending sales in the Beaufort-Jasper County REALTORS® region were down 0.1 percent overall, but the price range with the largest pending sales gain were for homes \$1,000,001 and above, where sales rose 38.5 percent.

## Inventory of Homes for Sale

### By Price Range

■ 3-2023 ■ 3-2024



With a per capita income of \$72,142 (BEA, 2022) and a median home sales prices of \$522,500 based on a recent Redfin 2024 report, the typical homebuyer in Beaufort County has very little opportunity to buy an affordable home that meets their budget. A \$200,000 home could cost a household \$1,754/month – assuming a 3% down payment and \$449/month in property taxes, homeowners insurance, and private mortgage insurance (PMI). [Nerd wallet] This monthly payment would also depend on the buyer's credit score. Therefore, the average resident (based on above per capita income) in Beaufort County could barely afford a \$200,000 home.

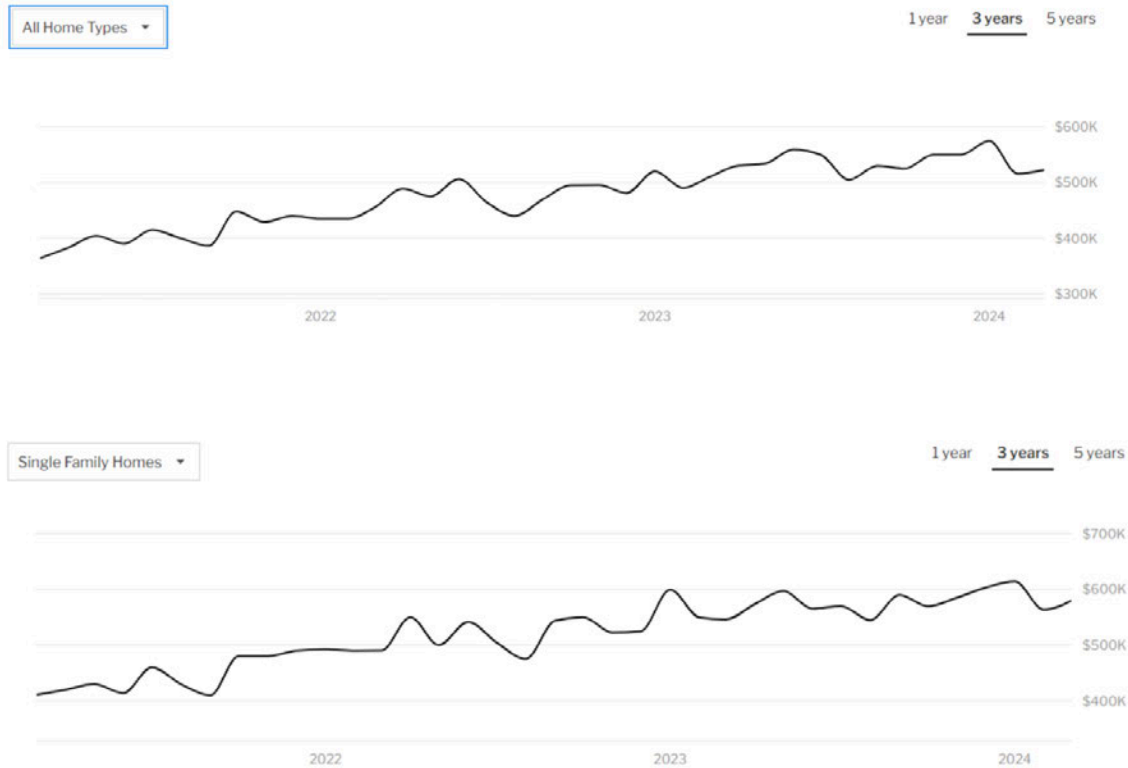
Based on Nerdwallet.com, current mortgage rates on average for the area are over 7 % for a 30-year fixed mortgage and 6.50% for a 15-year fixed mortgage, but - as mentioned - this depends on downpayment and credit score. Many lower income workers do not have significant savings for a down payment and may have credit issues making it harder for them to transition to ownership, especially if they are already cost-burdened and paying higher rents. The below chart shows mortgage interest based on current Annual Percentage Rates (APR).

Product	Interest Rate	APR
30-Year Fixed Rate	7.08%	7.13%
20-Year Fixed Rate	6.85%	6.91%
15-Year Fixed Rate	6.54%	6.62%
10-Year Fixed Rate	6.42%	6.50%

In addition to a limited pipeline of newly planned affordable homeownership options for the area and the low inventory of existing housing units, increased cost in wind and flood insurance are also impacting overall household's costs in Beaufort County. In some cases, insurance costs have doubled for residential and commercial properties, pricing people out of their homes. For the rental market, insurance premiums are passed along to renters by apartment owners therefore increasing the cost of rent for many families, while incomes have not kept up with housing costs. In some cases, rental property owners have converted their "previously affordable" rental properties into higher cost luxury apartments or short-term rentals, taking them out of the affordable housing inventory.

In March 2024, Beaufort County home prices were up 2.6% compared to last year, selling for a median price of \$523K. On average, homes in Beaufort County sell after 50 days on the market compared to 38 days last year. There were 495 homes sold in March this year, up slightly from 463 last year. (Redfin.com). Based on this recent data pulled from Redfin calculations of home data from MLS listings and public records the following charts show the continued rise in housing cost over the last 3-year.

The Charts include 1) All Home Types listed (villas, condos, townhomes and detached) and 2) Single Family Homes separately. The chart below shows overall housing types (condos, townhomes and single-family ownership) showing a trend of 43% increase in median sale price from 2021 to 2024. For single-family homes, the 3-year trend shows a 41% increase.



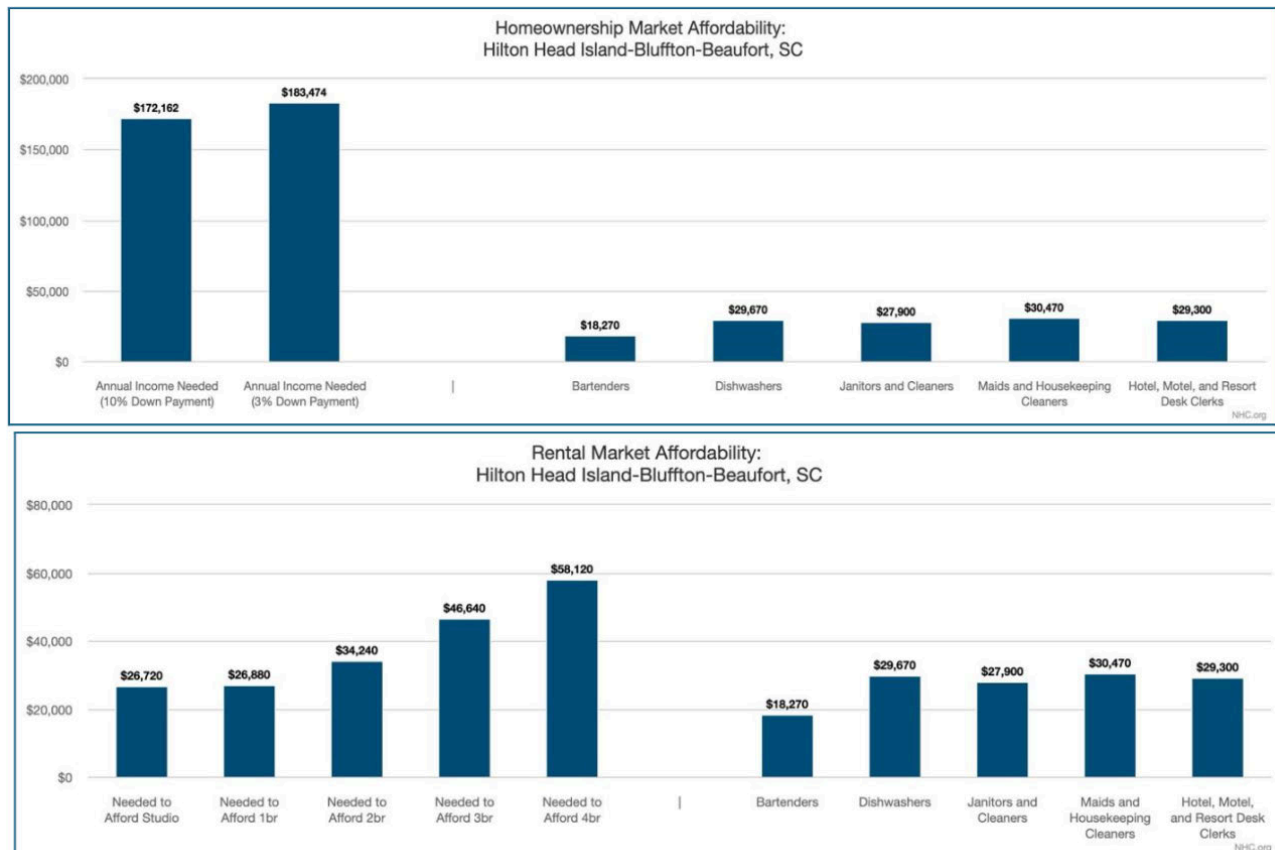
Beaufort County's housing costs is significantly higher compared to many neighboring cities and counties. The overall cost of living in Beaufort County is approximately 3% lower than the National average yet 6% higher than that of Savannah, GA and only 1% lower than that of Charleston, SC – two much-larger neighboring cities (Redfin). Next to Charleston, Beaufort is the most expensive market to buy in this comparison.

Location	Median Price	% Change from 2023 to 2024
Beaufort County	\$522,500	+ 2.6%
Horry County (Myrtle Beach)	\$328,000	+ 2.5%
Greenville County	\$352,495	+ 5.1%
Richland County (Columbia)	\$260,000	- .019%
Chatham County (Savannah)	\$366,000	+ 5.4%
Myrtle Beach	\$285,000	+ 14%
Charlotte MSA	\$402,000	+ 1.8%
Charleston	\$559,500	+ 7.6%

As evidenced in this chapter, there is a clear mismatch between housing that is available in the current market and the area incomes for some of the major workforce sectors. There continues to be few affordable housing options for the area's workforce with availability and affordability trending down. As highlighted in the National Housing Conference's Paycheck to Paycheck March 2024 Data Update for Beaufort County MSA areas, the qualifying income needed to afford a 2 Bedroom apartment at \$856/month in the Hilton Head Island-Bluffton-Beaufort, SC MSA is \$34,240 annually. All occupations shown in the table below do not produce enough annual income for the worker to afford a 2 BR rental or purchase a 2 BR home in the Beaufort County area (NHC's Paycheck to Paycheck Data Update March, 2024, <https://nhc.org/paycheck-to-paycheck/#>) – essentially locking them out of a chance at housing affordability.

Many of these cost-burdened workers fill occupations critical to the greater Beaufort County's tourism and leisure industry including Bartenders, Waiters, Dishwashers, Janitors and Maids, and Hotel and Resort Clerks. Others like Substitute Teachers, Home Health Aides, Childcare Workers, and Laundry and Dry-cleaning Workers serve the resident population all year-long yet cannot afford to live affordably in the community they serve.

The charts below from the Paycheck-to-Paycheck affordability index provide several examples - specifically for the workers in the hospitality and accommodations sectors - on what they can afford based on median incomes for each position as well as what they need to earn to afford a median price home or apartment in the Beaufort area.





Other major employment sector positions are also included below to show the growing mismatch between what area workers earn and what they can afford. Tourism related workers are faced with the largest barriers to finding housing options that are affordable but as one can see from the chart below other major employment sectors are also struggling to find affordable options in the region.

Occupation	Area Median Income	3% down qualify	Afford to buy?	1 BR Rent Qualify	Afford Rent 1 BR?	2 BR Rent Qualify	Afford Rent 2 BR?
Substitute <u>Teachers, Short-Term</u>	\$32,470	\$183,474	No	\$26,880	Yes	\$34,240	No
Teaching <u>Assistants, Except Postsecondary</u>	\$23,980	\$183,474	No	\$26,880	No	\$34,240	No
Home Health and Personal Care Aides	\$29,750	\$183,474	No	\$26,880	Yes	\$34,240	No
Security Guards	\$32,940	\$183,474	No	\$26,880	Yes	\$34,240	No
Bartenders	\$18,270	\$183,474	No	\$26,880	No	\$34,240	No
Fast Food and Counter Workers	\$26,590	\$183,474	No	\$26,880	No	\$34,240	No
Waiters and Waitresses	\$19,950	\$183,474	No	\$26,880	No	\$34,240	No
Dishwashers	\$29,670	\$183,474	No	\$26,880	Yes	\$34,240	No
Janitors and <u>Cleaners, Except Maids and Housekeeping Cleaners</u>	\$27,900	\$183,474	No	\$26,880	Yes	\$34,240	No
Maids and Housekeeping Cleaners	\$30,470	\$183,474	No	\$26,880	Yes	\$34,240	No
Hairdressers, Hairstylists, and Cosmetologists	\$29,460	\$183,474	No	\$26,880	Yes	\$34,240	No
Childcare Workers	\$27,670	\$183,474	No	\$26,880	Yes	\$34,240	No
Cashiers	\$26,980	\$183,474	No	\$26,880	Yes	\$34,240	No
Retail Salespersons	\$29,710	\$183,474	No	\$26,880	Yes	\$34,240	No
Hotel, Motel, and Resort Desk Clerks	\$29,300	\$183,474	No	\$26,880	Yes	\$34,240	No
Receptionists and Information Clerks	\$31,780	\$183,474	No	\$26,880	Yes	\$34,240	No
Laundry and Dry-Cleaning Workers	\$27,650	\$183,474	No	\$26,880	Yes	\$34,240	No
Parking Attendants	\$30,180	\$183,474	No	\$26,880	Yes	\$34,240	No
Stockers and Order Fillers	\$32,890	\$183,474	No	\$26,880	Yes	\$34,240	No

# Construction and Development Costs

## Ownership Market Costs:

A recent article by Today's Homeowner, highlighted that in South Carolina it could cost anywhere from \$150.92/sq.ft. for craftsman-style bungalow to \$603.60/sq.ft. for high-end plantation-style home. This same article highlighted an acre of farmland in South Carolina averages around \$2,830. However, urban lots cost significantly higher at \$500,000 per acre in most cities. These costs will vary depending on where in South Carolina a developer is building; urban vs rural, inland vs coastal etc. Beaufort County includes all these land typologies within the County. Although the submarket town/cities within Beaufort County have smaller populations than places like Charleston and Greenville, the urban cores within the County, like the City of Beaufort and Town of Bluffton, have all seen higher land cost along with construction costs. The County has unincorporated areas adjacent to these towns as well as quite a bit of rural areas that could have more affordable land but may have higher infrastructure costs. One developer interviewed shared it can cost over a \$1M per acre for land in the Island areas (pending location and infrastructure needs) and approximately \$340/sq. ft. for 3 story stick-built building. Another example shared included 2,000 sq.ft. 3-bedroom modular units priced at \$320,000/unit including site work but not land.

The Today's Homeowner article also pointed out the following average per square foot cost based on type of housing:

- **Craftsman Style Beach Cottage: \$150.92- \$188.65/sq.ft.** This type of home is very popular in Beaufort County due to its proximity to the ocean. Most of these types of homes have an average floor area of about 1,850 square feet indicating construction costs anywhere from \$278,500 to \$348,200.
- **Mid-Range Home: \$188.65- \$415.03/sq.ft.** This is for a Lowcountry cottage home typology with wrap around porches and southern design which is a common architectural style for many mid-range homes in the Beaufort area. Most of these types of homes with an average floor area of 1,850 square foot range between \$348,200 to \$766,145.
- **High-End or Luxury Home: \$415.03-\$603.68/sq.ft.** This type of home is typically considered a Plantation-style home usually found in upscale neighborhoods, especially in areas like Beaufort County and their adjacent jurisdictions like Hilton Head Island and Port Royal. Most of these types of homes vary in square footage and tend to be larger homes with high end finishes and amenities so can range anywhere from \$766,145 to \$1,111,400.



Several individual costs that make up these varying construction estimates include framing, exterior work, utilities, interior and finishing costs along with foundational work and labor costs. The costs will vary greatly depending on the type of materials selected and the current pricing for commodities like lumber and concrete. Labor shortages can also play a significant role in the final cost of construction.

	Craftsman-Style	Mid-Range	High-End/ Plantation Style
Charleston	\$175.00	\$262.50	\$700.00
Columbia	\$120.00	\$180.00	\$480.00
Myrtle Beach	\$159.00	\$238.50	\$636.00
Greenville	\$90.00	\$135.00	\$360.00
Hilton Head Island	\$111.08	\$166.62	\$444.32
Sumter	\$118.46	\$177.69	\$473.84
Spartanburg	\$97.00	\$145.50	\$388.00
Florence	\$80.00	\$120.00	\$320.00
Summerville	\$114.65	\$171.98	\$458.60
Beaufort	\$110.00	\$165.00	\$440.00

The chart above provides a good snapshot of estimated construction costs per square foot for various communities in South Carolina compared to the Beaufort area. It should be noted that these are industry-estimates, and each property and home can be significantly different per square foot based on design, location, final finishes and construction financing costs. For the purposes of this Housing Impact Analysis, the chart provides a baseline comparison to consider when evaluating what housing can be considered affordable. As a reminder, a household should spend no more than 30% of their household income or no more than 3 times their annual salary on a home purchase to be considered affordable.



## Land Cost:

As mentioned earlier in this same article by Today's Homeowner, land prices vary drastically depending on the location of the property and can be well over \$500,000/acre in some of the coastal areas like Beaufort. In some cases, finding smaller lots can be the best option to keep housing more affordable or increasing density on a piece of land to allow for more units to maximize the value of the land. A smaller piece of land, around a fourth of an acre, may cost around \$125,000, translating to approximately 10,890 square feet, which is more than enough for a single-family home.

## Other Construction Costs:

The article also mentioned site preparation can add between 3-8% to a project cost that is not included in typical construction costs and can vary greatly depending on the type of land the home is being built on. For example, in the Beaufort area, many homes must be built above the flood plain or have topology issues due to the proximity to the water or marshland, so they may require environmental mitigation efforts prior to being built or installed on stilts, etc. The cost of site work will also depend on the type of construction, the number of stories, and existing site conditions - creating a range between \$3.34 per square foot to a maximum of \$13.35 square foot.

In addition to building new affordable housing, the County is also interested in the preservation of housing. Both the Bowen Study and the Comprehensive plan included preservation as an important strategy to protect existing affordable housing stock and minimize potential displacement. As mentioned earlier there are few government-subsidized affordable housing units available within the County, which would be protected as affordable for longer- periods of time. Older existing apartments or villas, considered as "naturally occurring affordable housing or NOAH" due to their age, are also limited in the County. One developer shared a list of several properties throughout the county that might be considered relatively affordable or NOAH. These properties were listed between \$220,000-\$360,000 for 2 bedroom 2 bathroom just for acquisition, not taking into consideration repairs or improvements that might be necessary to preserve these units.

Other considerations on total development cost include pre-development and soft costs like professional service fees, architect, engineering, local approvals, permits and tap fees, etc.

## Other Impediments to development:

Due to the Beaufort County's location along the coast, other environmental considerations play a huge role in increasing the cost of development, including but not limited to building code requirement to address natural disasters and protections, like seismic and wind zones that require engineered drawings and specified materials that help eliminate risks of home destruction in the event of a hurricane or earthquake.



## Local Permitting and Impact Fees:

Although local permitting and impact fees can significantly increase the cost of housing development, the County has looked at where they can reduce or waive these fees for affordable housing developers. The County currently has an affordable housing impact fee waiver program that is described in more detail in the Removing Barriers Chapter of this analysis. The County is looking at other fee waivers and incentives they can implement to support increased affordable housing production, yet many of these fees are not under their control, like water and sewer tap fees or utility costs etc.

As part of the Bowen Housing Needs Assessment, researchers spoke to several developers about the cost of housing development as a barrier to ensuring more affordable options. The study mentioned that during one-on-one discussions with local affordable housing partners they indicated many obstacles that make it hard to develop more affordable housing in the County. One challenge is the high costs for infrastructure improvements and impact fees, finding the land to build and finding development partners willing to build affordable or mixed income housing, since costs have escalated so much over the past five years. Due to topography, wetland and environmental concerns, there is limited developable land in the County that is cost effective enough to make a significant impact on the demand for affordable housing.

Some recommendations that came from those meetings included partners suggesting the County consider more creative types of housing development (alternative types of housing), look at maximizing density where feasible, and consider mixed income where possible and commercial conversion as an option for under-utilized retail and commercial spaces - including repurposing older and dilapidated buildings that could be refurbished and made into affordable housing. The County has already looked at the conversion of older motels/hotels as an option for affordable housing and has a few projects underway within the County.

## Insurance:

Related to some of the added costs due to environmental considerations, insurance costs are playing a significant role in affordability. In some communities in the Beaufort area insurance costs for both ownership and rental properties have increased over 100%. A recent 2024 article indicated that homeowners across the country are facing an insurance crisis and driving up housing costs, especially in weather vulnerable coastal communities like Beaufort. According to a survey conducted by Redfin Corp. about 72% of U.S. homeowners said their policy had increased over the past year, about 8% of those surveyed said their insurance company stopped offering coverage for their homes all together. Redfin expects homeowner insurance rates will continue to rise in communities like South Carolina, Florida and California that are more prone to natural and environmental disasters. Insurance marketplace Insurify Inc. projected homeowners' insurance would rise about 6% in 2024 after roughly 20% annual rate increases between 2021 and 2023, that would bring the average rate to \$2,522 annually by the end of the year.

# Removing Barriers to Workforce Housing

## Incentivizing Affordable Workforce Housing:

A key aspect of this Housing Impact Analysis is to understand both the local barriers to the preservation and production of affordable workforce housing along with the strategies and incentives the County may already offer to support housing solutions. The Bowen Study outlined several housing strategies including planning policies and funding ideas for the County to consider that could incentivize private developers to create more affordable housing within their projects. Based on these recommendations and recognizing the growing demand for workforce housing over the last few years, the County has already implemented several developer incentive programs to support an increase in affordable housing.

Beaufort County Development Code includes an entire chapter on encouraging affordable housing as a key element of the County's growth and development priorities. In Chapter 4 of the Development Code, County Council indicated that affordable housing is the essential foundation upon which to build a more sustainable future for Beaufort County and to grow a more competitive workforce to meet the challenges of our regional, state, and global economy.

County Council found that zoning regulations can be an effective tool for implementing the strategies to address the needs for affordable housing stock within Beaufort County. Within the Developer Incentives Chapter, the County identified certain incentives and zoning tools that can help facilitate and encourage the development of affordable housing types. Specifically, this chapter was intended to promote a diversity of housing stock by providing certain incentives and regulatory standards for the creation of affordable housing units in the C5 zoning district. The following highlights specific excerpts from the Development Code that Beaufort County has already committed to support the increased production of affordable workforce housing.



## Developer Incentives:

### Chapter 4 of the Beaufort County Code

Within this chapter the County outlines what is required for a developer to access density bonuses and impact fee exemptions for projects that commit to including affordable housing within a larger development project.

The number of owner-occupied affordable housing units and/or rental affordable housing units per development shall be one of the following at the election of the applicant:

- Thirty (30%) percent of the dwelling units, rounded up to the whole number, shall be restricted by deed as owner occupied affordable housing units and/or rental affordable housing units for a period of at least twenty (20) years; or
- Twenty (20%) percent of the dwelling units, rounded up to the whole number, shall be restricted by deed as owner occupied affordable housing units and/or rental affordable housing units for a period of at least twenty-five (25) years.

**Density bonus.** Housing developments or re-developments located within the Regional Center Mixed Use (CS) zone district may elect to development land in compliance with this chapter. As an incentive for development under this chapter, there shall be no maximum density or minimum lot size requirements.

**Impact fees.** Impact fees shall be reduced in proportion to the number of affordable housing units being provided in accordance with Beaufort County Code of Ordinances Section 82-32. A project approved under this chapter shall be determined to be a project that creates affordable housing for the purpose of exempting impact fees in proportion to the number of affordable housing units created. The following table indicates the percentage of discount available for Impact Fees for Affordable Housing:

Area Median Income (AMI)	Impact Fee Discount
Under 60%	100%
60% to 80%	60%
Over 80%	0%

The County commits a certain amount of funding annually into their Beaufort County Affordable Fund to support this incentive for affordable workforce housing projects based on project eligibility and available funding. Development impact fees may be subsidized, as long as funds are available in the Beaufort County Affordable Housing Fund, by up to 100 percent for housing a person or family earning 80 percent or less of the county's median family income. Criteria approved by county council will be used to provide guidance and should be reviewed prior to requesting assistance from the County.

## Financing/Funding:

In addition to implementing several planning policies that can encourage developers to produce affordable workforce housing, the County has also committed funding to support financing solutions for development projects. One noteworthy strategy included leading the housing trust fund study that launched a regional housing trust fund. The County worked closely with other local jurisdictions and Jasper County to implement the Beaufort Jasper Housing Trust Fund (BJHT), which was officially incorporated in 2023. Participating jurisdictions signed an intergovernmental agreement, agreeing to the creation of the fund and a 10-year funding commitment, with the County being the largest contributor to the Fund initially.

### Beaufort Jasper Housing Trust Fund

The housing trust fund mission is to assist in the financing and funding of affordable housing. The housing trust fund was supported originally with a one-time allocation from the American Rescue Funds from each participating jurisdiction. Subsequent annual funding will need to be determined by each government partner from a local source that their Councils identify.

The above incentives and financing tools are a just a few of the initiatives that the County has already implemented to support the preservation and production of affordable workforce housing efforts. The County is constantly seeking ways to support affordable housing, including looking at policy or regulatory tools that could encourage more affordable and mixed income housing. With the passage of Act 57, the County now has the opportunity to utilize a new funding source for workforce housing projects within the County. These funds will help compliment the County's existing programs to increase the production and preservation of workforce housing.



Image from Garden Oaks Apartments



In addition to the efforts mentioned above, the County is also investigating the following policy and strategies to support the growing need for more affordable housing.

### **Preserve Existing Affordable Housing**

- Work with municipalities to develop conservation overlay zones or similar, to protect areas of naturally occurring affordable housing; an example would be the Oaklawn subdivision on Oaklawn Ave in the City of Beaufort.
- Prohibit new Short Term Rentals in single-family zoned neighborhoods unless the owner lives on the premises (i.e., prohibit new STRs on 6% property).
- Identify all LIHTC projects in the County; determine when the affordability period ends; develop options for extending affordability period or otherwise maintaining affordability.
- Consider establishing and/or funding local housing repair programs targeted at low-moderate income homeowners or income-restricted rental properties.

### **Promote New Affordable Housing**

- Revise development codes in the County and municipalities to promote more missing middle housing by allowing 2 accessory dwelling units (ADUs) per lot and allowing 2- and 3-family dwellings in current single-family zones. Consider allowing 4-family dwellings and townhouses.
  - eliminate on-site parking requirements for ADUs
- Waive or reduce building permitting fees for ADUs where owner signs an affidavit that covenants do not preclude it being rented.
  - consider waiving or reducing building permit fees for other Missing Middle housing types indefinitely or for a limited period of time to stimulate interest in development
- Work with SC Building Codes Council to allow 3- and 4-unit structures to be built with alternatives to sprinklers.
- Work with municipalities to develop pre-reviewed plans for Missing Middle Housing, starting with ADUs.
- Advocate legislature for authority to adopt inclusionary housing ordinances.
- Advocate legislature for authority to adopt real estate transfer fee that could be used for affordable housing and open space preservation.
- Adjust all impact fees to be based on the true impact of the use; fees should be based on square footage of the unit and/or the number of bedrooms.
- Facilitate a developers training workshop similar to what is done by The Incremental Development Alliance, to educate contractors and developers on developing Missing Middle Housing.



## Conclusion

The Bowen report emphasized the need for the County to support a balanced housing approach to meet the growing demand for diverse housing options with an emphasis on affordable workforce housing. As highlighted in this Analysis, while current housing shortages are more pronounced among lower-income households, the projected household growth among higher income households is significant. There is a need to provide housing to meet this population growth as well to avoid a “bottleneck effect”. When there is not sufficient housing stock in the market to meet diverse income growth, residents have few options to move into housing that meets their income, therefore they tend to stay in existing homes or rental units longer instead of upgrading to newer housing. When residents upgrade or move into a newer housing option, more affordable options are freed up for low to moderate income households to access. Additionally, when the housing market does not keep up with demand caused by population growth and limited housing stock, supply and demand market forces increase the overall cost of housing, making it difficult for low- and moderate-income families to find affordable housing.

The Bowen report also indicated projected growth to be robust among both renter- and owner-occupied households and among both younger and older adults, providing further evidence that future housing development will need to be diverse to meet the varied needs of each of these household segments. With the ongoing population growth as indicated in this analysis and the lack of available housing inventory, especially affordable options, the County is seeking diverse solutions to address the need for more affordable housing, with a focus on the growing workforce needs. The housing shortage is directly impacting the County’s ability to attract and retain employers and employees in some of the key business sectors mentioned in this Analysis, in particular within tourism related jobs. The County has already implemented several policies and programs to support the preservation and production of a broad spectrum of affordability levels and product types including some mentioned within this analysis.

With tourism continuing to be one of the top three employment sectors in the County, there is a clear nexus between the need for workforce housing solutions and the revenues generated by the tourism economy. The availability of ATAX to support workforce housing provides the County with a new revenue source to help with the development and implementation of additional solutions to meet the growing need for more affordable housing options.

The passage of Act 57 offers the County a new opportunity to increase financial resources available to support programs for affordable workforce housing opportunities. The County estimates a total State ATAX amount for FY2025 of about \$1,500,000. With the new law, the County could now use up to 15% of this tax revenue to support workforce housing efforts in addition to 15% of their local ATAX revenues, which could be a significant new resource to support affordable housing efforts in the County.

As outlined in Beaufort County's adopted 2040 Comprehensive Plan, the County is committed to a diverse community that balances growth, attracts business and employment opportunities, preserves the area's fragile environment, ensures affordable housing options, and maintains quality of life for all residents regardless of income. The County is also committed to investing in new public infrastructure, creating incentives for affordable housing, and focusing development on land of the highest suitability. Within the Housing Element of the 2040 Comprehensive Plan, the County's overarching goal is to promote quality, affordable housing available and accessible to all residents, while ensuring a mix of housing types available to residents of varying incomes, ages and abilities.

To address this growing workforce and housing mismatch as highlighted throughout this Housing Impact Analysis, Beaufort County will need to continue to play an active role in promoting affordable housing solutions. Efforts will need to include but are not limited to implementing additional planning and zoning policy incentives, enhance public/private partnerships with affordable housing developers and identify new and flexible funding sources that enable these projects to come to fruition.

The County through its comprehensive plan, has already committed to:

- Foster the creation of affordable housing near jobs, services and public transit.
- Reduce regulatory barriers to the creation of affordable housing.
- Establish an ongoing funding source to address housing needs.
- Partner with non-profit agencies and the private sector.
- Work regionally to address affordable housing needs.

To further support these commitments, the County is seeking the opportunity to increase funding sources for affordable workforce housing efforts through the adoption of this Housing Impact Analysis as an amendment to their 2040 Comprehensive Plan, enabling access to up to 15% of its Accommodation Tax (ATAX) revenue. Access to this new eligible source of funding can help stretch existing sources and leverage additional funding to support new housing programs and complement existing policy efforts.



# Sources

- 2018 Bowen Beaufort County Housing Needs Assessment
- 2023 South Carolina Palmetto Housing Study
- 2040 Beaufort County Comprehensive Plan
- 2024 Lowcountry Council of Government, Community Indicators Report
- Beaufort Jasper Counties REALTORS Association
- Biz Journals
- Capital Improvement Plan and Development Impact Fee Study, Tischler Bise Study, 2020
- Hilton Head Island Area Realtors Association
- Island's of Beaufort
- Livewell Terrace Market Study, 2023 T Ronald Brown Research & Analysis
- March 2024 SC State Paper
- May 2023 Bureau of Labor Statistics
- May 2024 Construction Costs
- National Housing Conference
- Redfin 1
- Redfin 2
- South Carolina State Housing Finance
- Today's Homeowner
- US Census Reporter ACS 2022 1-Year estimates
- World Population Review





# Appendix

**South Carolina General Assembly**  
125th Session, 2023-2024

**A57, R66, S284**

**STATUS INFORMATION**

General Bill

Sponsors: Senators Davis, Turner, Jackson, Scott, Kimpson, Senn, Campsen and Sabb

Companion/Similar bill(s): 4213

Document Path: SR-0145KM23.docx

Introduced in the Senate on January 10, 2023

Introduced in the House on April 4, 2023

Last Amended on May 10, 2023

Currently residing in the Senate

Summary: Development of Workforce Housing

**HISTORY OF LEGISLATIVE ACTIONS**

Date	Body	Action Description with journal page number
12/7/2022	Senate	Prefiled
12/7/2022	Senate	Referred to Committee on <b>Finance</b>
1/10/2023	Senate	Introduced and read first time (Senate Journal-page 178)
1/10/2023	Senate	Referred to Committee on <b>Finance</b> (Senate Journal-page 178)
3/22/2023		Scrivener's error corrected
3/22/2023	Senate	Committee report: Favorable <b>Finance</b>
3/24/2023		Scrivener's error corrected
3/28/2023	Senate	Read second time (Senate Journal-page 75)
3/30/2023	Senate	Amended (Senate Journal-page 13)
3/30/2023	Senate	Read third time and sent to House (Senate Journal-page 13)
3/30/2023	Senate	Roll call Ayes-34 Nays-6 (Senate Journal-page 13)
4/4/2023	House	Introduced and read first time (House Journal-page 9)
4/4/2023	House	Referred to Committee on <b>Ways and Means</b> (House Journal-page 9)
5/4/2023	House	Committee report: Favorable with amendment <b>Ways and Means</b> (House Journal-page 8)
5/9/2023	House	Debate adjourned (House Journal-page 27)
5/10/2023	House	Amended (House Journal-page 85)
5/10/2023	House	Read second time (House Journal-page 85)
5/10/2023	House	Roll call Yeas-80 Nays-29 (House Journal-page 88)
5/11/2023	House	Read third time and returned to Senate with amendments (House Journal-page 17)
5/11/2023	Senate	Concurred in House amendment and enrolled (Senate Journal-page 57)
5/11/2023	Senate	Roll call Ayes-41 Nays-2 (Senate Journal-page 57)
5/17/2023		Ratified R 66
5/19/2023		Signed By Governor
5/26/2023		Effective date 05/19/23
5/26/2023		Act No. 57

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## **VERSIONS OF THIS BILL**

[12/07/2022](#)

[03/22/2023](#)

[03/22/2023-A](#)

[03/24/2023](#)

[03/30/2023](#)

[05/05/2023](#)

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[12/07/2022](#)

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[03/22/2023-A](#)

[03/24/2023](#)

[03/30/2023](#)

[05/05/2023](#)

[05/10/2023](#)

(A57, R66, S284)

**AN ACT TO AMEND THE SOUTH CAROLINA CODE OF LAWS BY AMENDING SECTION 6-1-530, RELATING TO USE OF REVENUE FROM LOCAL ACCOMMODATIONS TAX, SO AS TO PROVIDE THAT THE DEVELOPMENT OF WORKFORCE HOUSING IS ONE OF THE PURPOSES FOR WHICH LOCAL ACCOMMODATIONS TAXES MAY BE USED; BY AMENDING SECTION 6-4-10, RELATING TO THE USE OF CERTAIN REVENUE FROM THE ACCOMMODATIONS TAX, SO AS TO PROVIDE THAT THE DEVELOPMENT OF WORKFORCE HOUSING IS ONE OF THE PURPOSES FOR WHICH THE FUNDS MAY BE USED; BY AMENDING SECTION 6-4-15, RELATING TO THE USE OF REVENUES TO FINANCE BONDS, SO AS TO PROVIDE THAT THE DEVELOPMENT OF WORKFORCE HOUSING IS ONE OF THE PURPOSES FOR WHICH BONDS MAY BE ISSUED; BY ADDING SECTION 6-4-12 SO AS TO REQUIRE A LOCAL GOVERNMENT TO PREPARE A HOUSING IMPACT ANALYSIS BEFORE USING SUCH FUNDS FOR WORKFORCE HOUSING; BY AMENDING SECTIONS 6-4-5 AND 6-1-510, RELATING TO DEFINITIONS, SO AS TO ADD CERTAIN DEFINITIONS; BY AMENDING SECTION 6-29-510, RELATING TO LOCAL PLANNING, SO AS TO REQUIRE THE PLANNING COMMISSION MUST SOLICIT INPUT FOR THE ANALYSIS FROM HOMEBUILDERS AND OTHER EXPERTS WHEN DEVELOPING A HOUSING ELEMENT FOR THE LOCAL COMPREHENSIVE PLAN; TO CREATE THE LAND DEVELOPMENT STUDY COMMITTEE TO EXAMINE CURRENT AND PROSPECTIVE METHODS TO PLAN FOR AND MANAGE LAND DEVELOPMENT; AND TO REQUIRE A REPORT DETAILING THE EFFECTS OF THIS ACT ON TOURISM AND WORKFORCE HOUSING.**

Be it enacted by the General Assembly of the State of South Carolina:

#### **Local accommodations tax for workforce housing**

SECTION 1. Section 6-1-530(A) of the S.C. Code is amended to read:

(A) The revenue generated by the local accommodations tax must be

used exclusively for the following purposes:

(1) tourism-related buildings including, but not limited to, civic centers, coliseums, and aquariums;

(2) tourism-related cultural, recreational, or historic facilities;

(3) beach access, renourishment, or other tourism-related lands and water access;

(4) highways, roads, streets, and bridges providing access to tourist destinations;

(5) advertisements and promotions related to tourism development;

(6) water and sewer infrastructure to serve tourism-related demand;

or

(7) development of workforce housing, which must include programs to promote home ownership. However, a county or municipality may not expend or dedicate more than fifteen percent of its annual local accommodations tax revenue for the purposes set forth in this item. The provisions of this item are no longer effective after December 31, 2030.

### **State accommodations tax for workforce housing**

SECTION 2. Section 6-4-10(4) of the S.C. Code is amended to read:

(4)(a) The remaining balance plus earned interest received by a municipality or county must be allocated to a special fund and used for tourism-related expenditures. This section does not prohibit a municipality or county from using accommodations tax general fund revenues for tourism-related expenditures.

(b) The funds received by a county or municipality which has a high concentration of tourism activity may be used to provide additional

county and municipal services including, but not limited to, law enforcement, traffic control, public facilities, and highway and street maintenance, as well as the continual promotion of tourism. The funds must not be used as an additional source of revenue to provide services normally provided by the county or municipality but to promote tourism and enlarge its economic benefits through advertising, promotion, and providing those facilities and services which enhance the ability of the county or municipality to attract and provide for tourists.

“Tourism-related expenditures” include:

- (i) advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity;
- (ii) promotion of the arts and cultural events;
- (iii) construction, maintenance, and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities;
- (iv) the criminal justice system, law enforcement, fire protection, solid waste collection, and health facilities when required to serve tourists and tourist facilities. This is based on the estimated percentage of costs directly attributed to tourists;
- (v) public facilities such as restrooms, dressing rooms, parks, and parking lots;
- (vi) tourist shuttle transportation;
- (vii) control and repair of waterfront erosion, including beach renourishment;
- (viii) operating visitor information centers;
- (ix) development of workforce housing, which must include programs to promote home ownership. However, a county or municipality may not expend or dedicate more than fifteen percent of its annual local accommodations tax revenue for the purposes set forth in



this item (4)(b)(ix). The provisions of this item (4)(b)(ix) are no longer effective after December 31, 2030.

(c)(i) Allocations to the special fund must be spent by the municipality or county within two years of receipt. However, the time limit may be extended upon the recommendation of the local governing body of the county or municipality and approval of the oversight committee established pursuant to Section 6-4-35. An extension must include provisions that funds be committed for a specific project or program.

(ii) Notwithstanding the provisions of subsubitem (i), upon a two-thirds affirmative vote of the membership of the appropriate local governing body, a county or municipality may carry forward unexpended allocations to the special fund beyond two years provided that the county or municipality commits use of the funds exclusively to the control and repair of waterfront erosion, including beach renourishment or development of workforce housing, which must include programs to promote home ownership. The county or municipality annually shall notify the oversight committee, established pursuant to Section 6-4-35, of the basic activity of the committed funds, including beginning balance, deposits, expenditures, and ending balance.

(d) In the expenditure of these funds, counties and municipalities are required to promote tourism and make tourism-related expenditures primarily in the geographical areas of the county or municipality in which the proceeds of the tax are collected where it is practical.

### **Bonds for workforce housing**

SECTION 3. Section 6-4-15 of the S.C. Code is amended to read:

Section 6-4-15. A municipality or county may issue bonds, enter into other financial obligations, or create reserves to secure obligations to finance all or a portion of the cost of constructing facilities, all of which must fulfill the purpose of this chapter, for civic activities, the arts, cultural events, or workforce housing that includes programs to promote home ownership. The annual debt service of indebtedness incurred to finance the facilities or lease payments for the use of the facilities may be provided from the funds received by a municipality or county from the accommodations tax in an amount not to exceed the amount received by the municipality or county after deduction of the accommodations tax funds dedicated to the general fund and the advertising and promotion fund. However, none of the revenue received by a municipality or county from the accommodations tax may be used to retire outstanding bonded indebtedness unless accommodations tax revenue was obligated for that purpose when the debt was incurred.

### **Housing impact analysis**

SECTION 4. Chapter 4, Title 6 of the S.C. Code is amended by adding:

Section 6-4-12. (A) If a local government intends to use the funds for the development of workforce housing, then the local government shall prepare a housing impact analysis prior to giving second reading to the ordinance.

(B) The analysis required by subsection (A) must include:

(1) information about the effect of the ordinance on housing, including the effect of the ordinance on each of the following:

(a) the cost of developing, construction, rehabilitating, improving, maintaining, or owning single-family or multifamily

dwellings;

(b) the purchase price of new homes or the fair market value of existing homes;

(c) the cost and availability of financing to purchase or develop housing;

(d) housing costs; and

(e) the density, location, setback, size, or height development on a lot, parcel, land division, or subdivision; and

(2) an analysis of the relative impact of the ordinance on low- and moderate-income households.

(C) The following applies to information on housing costs required to be included in the analysis conducted pursuant to subsection (B)(1)(d):

(1) the analysis must include reasonable estimates of the effect of the ordinance on housing costs, expressed in dollar amounts. The local government shall include a brief summary of, or worksheet demonstrating, the computations used in determining the dollar amounts. However, if the local government determines that it is not possible to make an estimate expressed in dollar amounts, then the analysis must include a statement setting forth the reasons for the local government's determination; and

(2) the analysis must include descriptions of both the immediate effect and, to the extent ascertainable, the long-term effect of the ordinance on housing costs.

(D) Except as otherwise provided in this section, a housing impact analysis required pursuant to this section must be based on costs associated with the development, construction, financing, purchasing, sale, ownership, or availability of a median-priced single-family residence. However, the analysis may include estimates for larger developments as part of an analysis of the long-term effects of the

ordinance.

(E) A local government may request information from any state agencies, local units of government, universities or colleges, organizations, or individuals as necessary to prepare a housing impact analysis pursuant to this section.

(F) The local government shall provide the housing impact analysis for an ordinance to the members of the legislative body of the local government, the Department of Revenue, and the Tourism Expenditure Revenue Committee before the ordinance is considered by the legislative body. The Department of Revenue may not disburse any accommodations taxes to the local government for purposes of development of workforce housing unless and until the local government has provided the housing impact analysis to the parties required pursuant to this subsection.

## **Definitions**

SECTION 5. Section 6-4-5 of the S.C. Code is amended to read:

Section 6-4-5. As used in this chapter:

(1) “County area” means a county and municipalities within the geographical boundaries of the county.

(2) “Cultural”, as it applies to members of advisory committees in Section 6-4-25, means persons actively involved and familiar with the cultural community of the area including, but not limited to, the arts, historical preservation, museums, and festivals.

(3) “Hospitality”, as it applies to members of the committees in item (2), means persons directly involved in the service segment of the travel and tourism industry including, but not limited to, businesses that

primarily serve visitors such as lodging facilities, restaurants, attractions, recreational amenities, transportation facilities and services, and travel information and promotion entities.

(4) “Travel” and “tourism” mean the action and activities of people taking trips outside their home communities for any purpose, except daily commuting to and from work.

(5) “Housing costs” for housing occupied by the owner means:

(a) the principal and interest on a mortgage loan that finances the purchase of the housing;

(b) the closing costs and other costs associated with a mortgage loan;

(c) mortgage insurance;

(d) property insurance;

(e) utility-related costs;

(f) property taxes; and

(g) if the housing is owned and occupied by members of a cooperative or an unincorporated cooperative association, fees paid to a person for managing the housing.

(6) “Housing costs” for rented housing means:

(a) rent; and

(b) utility-related costs, if not included in the rent.

(7) “Ordinance” means an ordinance adopted pursuant to Section 6-29-530.

(8) “Utility-related costs” means costs related to power, heat, gas, light, water, and sewage.

(9) “Workforce housing” means residential housing for rent or sale that is appropriately priced for rent or sale to a person or family whose income falls within thirty percent and one hundred twenty percent of the median income for the local area, with adjustments for household size,

according to the latest figures available from the United States Department of Housing and Urban Development (HUD).

### **Definition**

SECTION 6. Section 6-1-510 of the S.C. Code is amended by adding:

(4) “Workforce housing” means residential housing for rent or sale that is reasonably and appropriately priced for rent or sale to a person or family whose income falls within thirty percent and one hundred twenty percent of the median income for the local area, with adjustments for household size, according to the latest figures available from the United States Department of Housing and Urban Development (HUD).

### **Local comprehensive plan**

SECTION 7. Section 6-29-510(D)(6) of the S.C. Code is amended to read:

(6) a housing element which considers location, types, age, and condition of housing, owner and renter occupancy, and affordability of housing. This element includes an analysis to ascertain nonessential housing regulatory requirements, as defined in this chapter, that add to the cost of developing affordable housing but are not necessary to protect the public health, safety, or welfare and an analysis of market-based incentives that may be made available to encourage development of affordable housing, which incentives may include density bonuses, design flexibility, and streamlined permitting processes. The planning commission must solicit input for this analysis from homebuilders,

developers, contractors, and housing finance experts when developing this element;

### **Land Development Study Committee**

SECTION 8. (A) There is created the Land Development Study Committee to examine current and prospective methods to plan for and manage land development in South Carolina.

(B) The study committee must be comprised of three members of the Senate appointed by the President of the Senate and three members of the House of Representatives appointed by the Speaker of the House. Staff from the Senate and House of Representatives shall assist the study committee.

(C) The members of the study committee shall seek assistance from governmental agencies including the South Carolina Building Codes Council, the South Carolina Housing Authority, and the South Carolina Department of Agriculture, and from members of the private sector including, but not limited to, the Homebuilders Association of South Carolina, Habitat for Humanity South Carolina, the Realtors Association of South Carolina, the Municipal Association of South Carolina, the South Carolina Association of Counties, South Carolina Land Trust, Conservation Voters of South Carolina, the South Carolina Chapter of the American Planning Association, and the Manufactured Housing Institute of South Carolina.

(D) The study committee shall provide a report to the General Assembly by December 31, 2023, at which time the study committee shall dissolve.

### **Report**



SECTION 9. Before the beginning of the 2030 Legislative Session, the Director of the Department of Parks, Recreation and Tourism, in consultation with the Secretary of Commerce and the Commissioner of Agriculture, shall issue a report to the General Assembly detailing the effects on tourism and workforce housing resulting from the codified provisions of this act.

**Time effective**

SECTION 10. This act takes effect upon approval by the Governor.

Ratified the 17<sup>th</sup> day of May, 2023.

Approved the 19<sup>th</sup> day of May, 2023.

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**ORDINANCE 2024/\_\_\_\_\_**

**COMPREHENSIVE PLAN AMENDMENT TO ADD THE BEAUFORT COUNTY HOUSING IMPACT ANALYSIS AS AN APPENDIX TO THE 2040 COMPREHENSIVE PLAN**

**WHEREAS**, Beaufort County Council adopted the 2040 Comprehensive Plan in November 2021, wherein housing was incorporated as a major theme; and

**WHEREAS**, the South Carolina General Assembly amended SC Code §6-4-12 to allow Accommodations Tax Revenue (ATAX) to be eligible to support workforce housing; and

**WHEREAS**, the new law requires that the County must complete and adopt a Housing Impact Analysis to the Comprehensive Plan in order to be eligible to enable state ATAX funds; and

**WHEREAS**, it is required that the analysis must include a review of costs, prices, availability of financing, general housing costs, development standards, the impact of the ordinance on the households; and

**WHEREAS**, the Beaufort County Housing Impact Analysis achieves this requirement; and

**WHEREAS**, the Beaufort County Planning Commission considered the request on September 5, 2024, voting \_\_\_\_ to recommend that County Council \_\_\_\_ the request; and

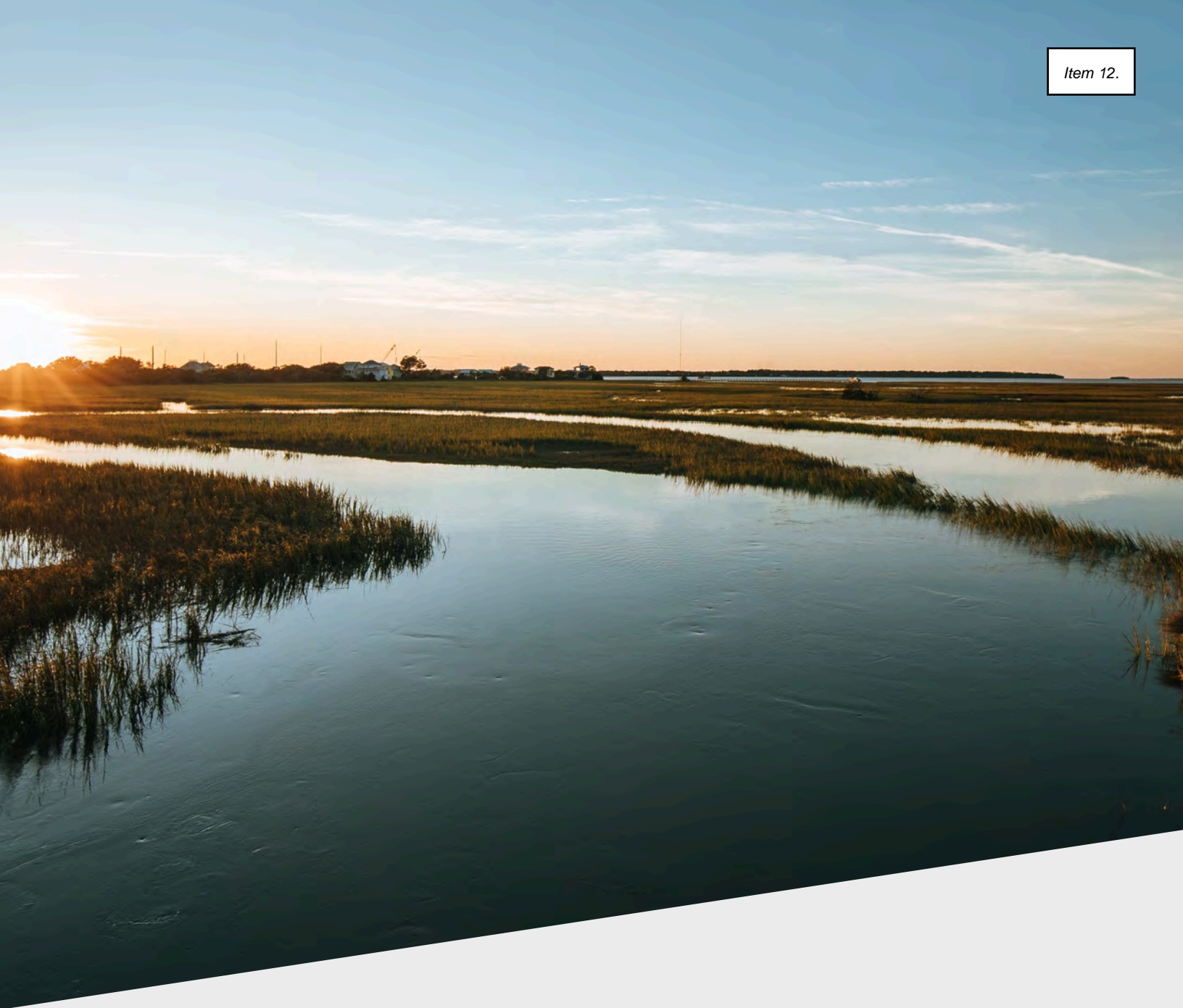
**WHEREAS**, County Council now wishes to amend the Beaufort County 2040 Comprehensive Plan to add the Beaufort County Housing Impact Analysis as an appendix.

**NOW, THEREFORE, BE IT ORDAINED** that Beaufort County Council, duly assembled, does hereby authorize, an ordinance amending the Beaufort County 2040 Comprehensive Plan to add the Beaufort County Housing Impact Analysis as an appendix.

Ordained this \_\_\_\_ day of \_\_\_\_\_, 2024

\_\_\_\_\_  
Joseph Passiment, Chairman

\_\_\_\_\_  
Sarah Brock, Clerk to Council



# HOUSING IMPACT ANALYSIS

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JUNE 2024 // PREPARED BY TOGETHER CONSULTING



Beaufort County  
SOUTH CAROLINA

*Beaufort County Housing Impact Analysis*

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# Acknowledgements

The following information outlined within this Housing Impact Analysis was made possible thanks to several resources and analysis in past planning and research efforts, various local, state and community data resources, and feedback from local housing partners, developers and realtors.

## Community Partners:

- Hilton Head Area Realtors Association
- Beaufort Jasper Realtors Association
- Lowcountry Council of Governments
- Hilton Head Area Home Builder Association
- Beaufort Chamber of Commerce
- Local Builders and Developers

## County Staff:

- John Robinson, Interim County Administrator
- Thomas Keaveny, II, Beaufort County Attorney
- Chuck Atkinson, Assistance County Administrator for Development Services
- Robert Merchant, Planning & Zoning Department Director
- Christine Webb, Director of Compliance, Standards & Internal Controls
- Elizabeth Anderson, Planner

## County Council:

- Joe Passiment, Chairman
- Larry McElynn, Vice-Chairman
- Gerald Dawson, District 1
- David Bartholomew, District 2
- York Glover, District 3
- Alice Howard, District 4
- Anna Maria Tabernik, District 6
- Logan Cunningham, District 7
- Paula Brown, District 8
- Mark Lawson, District 9
- Thomas Reitz, District 11

## Consultants:

Tammie Hoy Hawkins

Together Consulting

*Design Support: Virginia Howat*



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# Executive Summary

In November 2021, Beaufort County Council adopted the County's 2040 Comprehensive Plan. As part of this Plan, the County highlighted affordable housing as a critical need within their overall Housing Element. Prior to the adoption of this plan, the County commissioned a 2017 Housing Needs Assessment conducted by the Bowen Research group. The study was a deep dive into the County's housing market including current conditions, trends, and growth patterns along with an evaluation of projected housing needs over the next 5-year period. The Assessment was finalized in 2018. Much of the data referenced in this Housing Impact Analysis is derived from this Study along with insights from the County's 2040 Comprehensive Plan and complimented by more recent local and national data sources. Although the Bowen Study is over five years old, much of the analysis and trends are still relevant today and many of the predictions established in the 2018 plan have been realized and in some cases, have accelerated even more than anticipated, especially as it relates to housing affordability.

Within both documents, several strategies were recommended to the County for implementation to address the growing demand for more affordable housing to meet the needs of its residents and workforce. The County has already implemented several of these recommendations including but not limited to helping to establish a regional housing trust fund to support more financing and funding for affordable workforce housing, as well as offering various incentives to developers building affordable housing such as density bonuses where feasible and impact fee waivers for certain qualifying projects. Although these are valuable programs to support affordable housing production and preservation, the County has limited funding and financial resources to support the amount of affordable housing needed across the County footprint. The County receives limited federal or state funding for housing, therefore they must define local revenue sources to fill financing gaps. With the recent passage of Act 57 of the 2023 South Carolina General Assembly, amending SC Code 6-4-12, to allow Accommodations Tax Revenue (ATAX) to be eligible to support workforce housing, the County now has a new opportunity to increase local funding to support affordable housing projects.

This new law allows up to 15% of both local and state ATAX to be used to support workforce housing for those individuals earning between 30% and 120% Area Median Income (AMI). To enable the state ATAX funds to be eligible for workforce housing, the County must complete, as required by amended Section 6-4-12 of South Carolina law, a Housing Impact Analysis (HIA).



This analysis must include an overview of the following key data points and considerations:

- The cost of developing, constructing, rehabilitating, improving, maintaining, or owning single family or multifamily dwellings,
- A review of the purchase prices of new homes or the fair market value of existing homes,
- The cost and availability of financing to purchase or develop housing,
- General housing costs; including a brief summary indicating reasonable cost estimates,
- A review of density, location, setback, size, or height development on a lot, parcel, land division, or subdivision that might impact housing; and
- An analysis of the relative impact of the ordinance on low- and moderate-income households.

This Housing Impact Analysis (HIA) must also be approved by the County Planning Commission, adopted as an amendment to County's Comprehensive Plan and approved by Council. The County is also required to provide the HIA to the members of the legislative body of the local government, the Department of Revenue, and the Tourism Expenditure Revenue Committee before an ordinance is considered by the legislative body. The Department of Revenue may not disburse any accommodations taxes to the local government for purposes of development of workforce housing unless and until the local government has provided the HIA to the parties mentioned above.

The following Beaufort County HIA takes into account insights from previous housing studies along with housing trend research over the past few years, while also highlighting current economic and housing conditions, emphasizing the growing demand for workforce housing across the County.



# Introduction

The Beaufort County area is made up of a variety of diverse communities from resort areas to beach towns to urban cores to rural communities. These diverse community landscapes will require a variety of strategies when addressing housing needs. Many developments in the county are within city and town submarkets, but the County recognizes that affordable housing is a need that impacts everyone regardless of jurisdictional boundaries. The success of the overall community depends on the County working closely with each jurisdiction to address the housing needs of the diverse workforce.

The Beaufort County housing market has continued to grow over the past decade with an accelerated growth in residential construction totaling 19,857 units developed since 2010. Based on a recent housing market study conducted by Ronald Brown, Research & Analysis, 17,112 of those were single family homes and 2,745 were multifamily housing units, with the largest gain in multifamily in 2021. Prior to the last five years, there were few multifamily projects completed within the County. Although there have been recent housing development within the county, including two Low Income Housing Tax Credit (LIHTC) projects currently underway, there are still too few affordable housing rental options within the County to meet the growing demand.

The 2018 Bowen Housing Needs Assessment provided the County with a better understanding of market conditions at the time and outlined the projected changes expected over the coming years that could influence future housing needs. This Housing Needs Assessment is the most current housing study completed for the county, outside the County's Comprehensive Plan, completed in 2021. The Assessment focused on select sub-markets within Beaufort County, an evaluation of past, current and projected demographic characteristics, employment trends, economic drivers, and all major housing components within the market (for-sale/ownership and rental housing) including housing costs verses area incomes. Several key recommendations from the assessment included regional strategies that would not only support Beaufort County unincorporated residents but all submarket jurisdictional partners' workforce housing needs.

One specific recommendation led to a deep dive study by the Asakura Robinson consulting group on creating a regional housing trust fund which led to the formal creation of the Beaufort Jasper Housing Trust. The new Fund became an official nonprofit in 2023 and hired its first Executive Director in April 2024.





The Assessment also evaluated factors that were affecting housing market conditions, development barriers, and affordability. All of these factors are also key components as part the Act 57's required Housing Impact Analysis. It is important to stress that the following document is a moment in time snapshot of the economic and housing market conditions in Beaufort County over the last few years along with an analysis of current market trends. The housing market within the County and the submarket communities are not static and continue to shift daily.

The goal of the Housing Impact Analysis is to provide an overview for the growing demand for workforce housing and make a clear connection between the economic need for housing and the community's workforce. In addition, the Analysis dives into what the County is already doing to support workforce housing including funding committed and also local policy efforts to remove barriers to workforce housing.

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# Background

Affordable housing is a growing concern for Beaufort County. The 2018 Bowen study indicated a need for over 6,000 total new housing units for rental and ownership over a five year period to meet the existing and projected demand, with the greatest need for the lowest income households, along with a significant need for moderate-income households. The study recommended that future rental housing development should consider a variety of rent and income-eligibility levels, and there is an equal need for more home-ownership housing priced under \$200,000, primarily due to projected household growth and limited supply.

These are pre-pandemic estimates. The demand has accelerated over the past five years due to in-migration of new residents and expanded growth in the region. Based on the Department of Housing and Urban Development's annual median incomes, the 2023 median income for a family of four in Beaufort County, was \$111,300 - up by almost 30% from previous years. Considerable growth in income is due to the influx of new residents that either retired to the area or remote workers bringing higher salaries to the region post-pandemic, which also explains the growth in senior population. A 2024 Beaufort Chamber Economic Report indicated that Beaufort ranked 10th out of all counties in population growth for South Carolina. The same Economic Report also indicated that Beaufort County households' rank higher than the state average for mortgage holders and renters that are cost-burdened.

In addition to the completion of the 2018 Bowen Housing Needs Assessment and the Asakura Robinson's Housing Trust Fund Analysis, Beaufort County completed their 2040 Comprehensive Plan in November 2021. The Comprehensive Plan acknowledges that the County is closely linked to its municipalities and adjacent counties, sharing roads, waterways, habitats, and open spaces which do not follow jurisdictional boundaries. Therefore the County share many community connections with the other areas between where people live, work, worship, and play throughout the region. This requires that high levels of cooperation and collaboration be maintained within the region so that local identities can be expressed within a framework of shared goals regarding infrastructure, environmental protection, growth, economic development, and affordable housing.

Within the Comprehensive Plan, the County highlights core strategies to include the investment in new public infrastructure, creating incentives for affordable housing, and focusing on balanced development that mitigates environmental harm, so future generations will be able to enjoy the quality of life and economic prosperity offered by Beaufort County's unique landscape and culture. As part of the Housing Element within the Comprehensive Plan, the County's goal is to promote quality, affordable housing available and accessible to all residents.

The lack of quality affordable housing was identified as a growing challenge for the County and the submarkets within the county. These challenges are not just the lack of affordable housing options for families but an increasing issue for the growing senior population, many of which are still working, but also live on fixed incomes with little options for housing that is affordable. Based on the Comprehensive Plan, the greatest projected growth by household age group is expected to occur among seniors, which creates the need for more senior-based housing, health care and programs, assisted living facilities and continuing care facilities. Many of these facilities require an extensive, diverse workforce to support residents, many of which earn lower incomes. In many cases workers find it difficult to find affordable housing near these senior communities and have to drive- -often long distances- -to get to their workplace, which congests roadways, utilizes land for parking, and lengthens the workday.

Although Act 57 allows the County to utilize ATAX funding to support workforce housing that supports households up to 120% of the area median income, the County through its Comprehensive Plan and Development Code has defined affordable housing and prioritized the following populations below:

- **Owner occupied affordable housing unit:** A dwelling unit where at least one occupant is an owner, and where all occupants have, in the aggregate, household income less than or equal to one hundred (100%) percent of the area median income (AMI) for owner occupied units. Area median income (AMI) shall be determined annually by the United States Department of Housing and Urban Development (HUD) as adjusted by the Beaufort County Human Services Department or its successor. At the time of this report, Beaufort County AMI for a family of four was \$111,300.
- **Rental affordable housing unit:** A dwelling unit, where occupants have, in the aggregate, household income less than or equal to eighty (80%) percent of the area median income (AMI) for rental units. AMI shall be determined annually by HUD as adjusted by the Beaufort County Human Services Department or its successor.
- **Qualified household:** Households where occupants have, in the aggregate, a household income less than or equal to one hundred (100%) percent of the AMI for owner occupied units, and a household income less than or equal to eighty (80%) percent of the AMI for rental units.
- **Initial maximum allowable sales price:** An amount equal to three (3) times one hundred (100%) percent of the AMI plus any subsidy available to the buyer.
- **Affordable rent:** Affordable rent is based on an amount not to exceed thirty (30%) percent of eighty (80%) percent of the AMI as published annually by HUD based on household size, inclusive of a utility allowance. Utility allowances are as provided by HUD guidelines.





With a focus on serving these populations, the County's Comprehensive Plan also indicated the County will need to play an active role in affordable housing solutions in order to build a sustainable future for tourism and other major industries, protect its military bases, and continue to be a desirable place to live for people of all income levels.

A comprehensive affordable housing approach will:

- Foster the creation of affordable housing near jobs, services, and public transit.
- Reduce regulatory barriers to the creation of affordable housing.
- Establish an ongoing funding source to address housing needs.
- Partner with non-profit agencies and the private sector.
- Work regionally to address affordable housing needs.

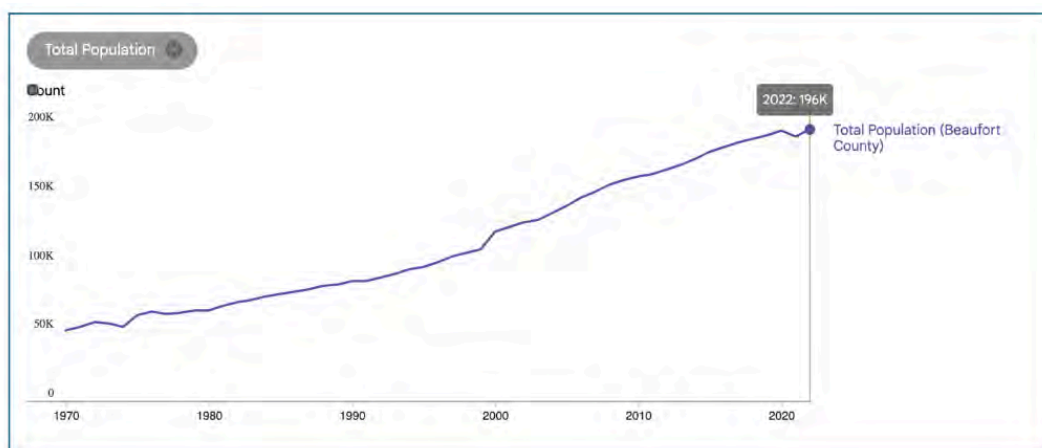


# Population Analysis

Beaufort County population growth over the past decade has had a significant impact on the overall availability of housing - accelerating the need for more housing at all income levels particularly for low- and moderate-income households more burdened by escalating prices. The Bowen report indicated from 2000 to 2010, Beaufort County population increased by 41,298, or by 34.2%, and added an additional 25,216 (15.5%) people between 2010 and 2017. At the time of the study completion in 2018, the total population was estimated at 187,445 with a projected increase to 225,359 by 2027. (See Bowen Chart below)

	Total Population – Long Term (10-Year) Projections			
	2017 (Estimated)	2027 (Projected)	Change 2017-2027	
			Number	Percent
<b>Beaufort County</b>	187,445	225,359	37,914	20.2%
<b>Beaufort</b>	12,010	14,162	2,152	17.9%
<b>Bluffton</b>	18,889	24,749	5,860	31.0%
<b>Hilton Head</b>	37,797	44,837	7,040	18.6%
<b>Port Royal</b>	11,958	13,800	1,842	15.4%
<b>Northern Unincorporated</b>	26,842	31,928	5,056	18.8%
<b>Southern Unincorporated</b>	44,325	53,265	8,940	20.2%
<b>Unincorporated Islands</b>	19,570	23,362	3,792	19.4%

2022 data from US Census, via datacommons.org indicated the County population at 196,000, approximately 4.5% increase over the 5-year period. According to worldpopulationreview.com, the estimated population of Beaufort County, South Carolina in 2024 is 201,811, which is a 1.42% increase from the previous year. The county's population has grown 23.93% since 2010, when it was 162,843. The County continues to grow on the pace as predicted by the Bowen report.



Year	Population	Growth
2024	201,811	2,832
2023	198,979	2,832
2022	196,147	4,150
2021	191,997	4,182

Source: world population review

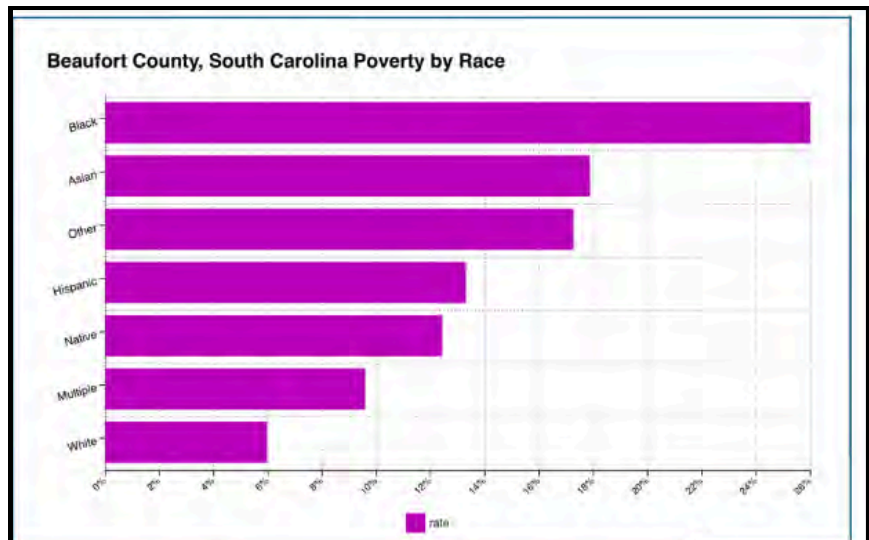
Like Beaufort County, adjacent coastal communities are growing just as rapidly, which has an impact on housing stock and availability for housing options near employment centers in Beaufort. In March 2024, The State paper indicated, most of South Carolina's 46 counties gained population in 2023, but 10 of them grew faster than the rest. Of those, Jasper County had the biggest population gains at 4.87% year-over-year. It was followed closely by Berkeley County at 4.19%. Horry County came in third with a 3.74% increase in 2023. Much of the population growth to South Carolina are households moving from higher cost markets like the northeast and midwestern cities, which has also impacted the area's median income growth.





With the in-migration of higher income households, existing residents are feeling the increased pressure on the housing market and finding it more difficult to afford housing within the County. In 2023, HUD indicated that 100% of the Area Median Income (AMI) for a family of four was \$111,300. Yet a significant portion of the major industry workforce earn less than 80% of the AMI.

Many working families live below the poverty line in Beaufort County, and the poverty rate among those that worked full-time for the past 12 months was 2.84%. Among those working part-time, it was 8.86%. 26% of Black households in Beaufort County live below the poverty line, while the white population living below poverty was 5.97%. Although poverty continues to be an issue, Beaufort County has seen a growth in higher income households due to in-migration post Covid-19.

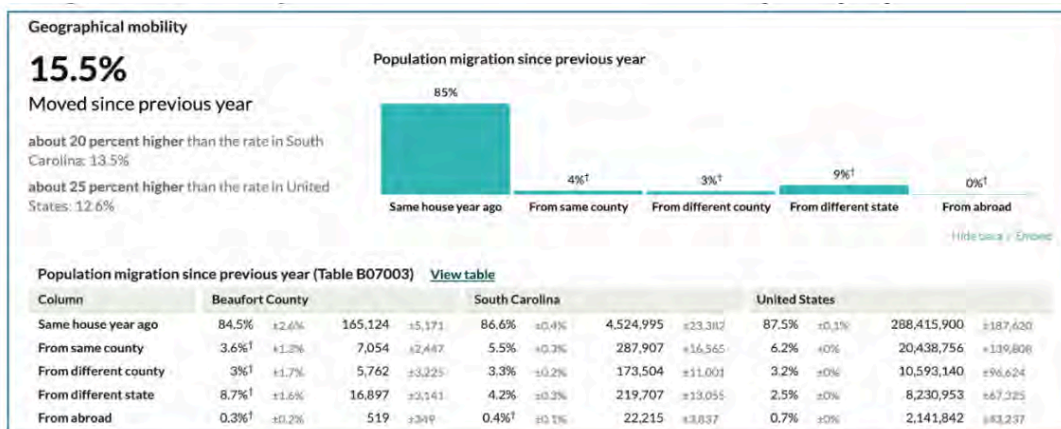


ACS 2022 1-year

Table universe: Households

Column →	Beaufort County, SC	South Carolina	United States
Less than \$10,000	3.9% ±1.2%	6.1% ±0.3%	5.5% ±0%
\$10,000 to \$14,999	3% ±1.5%	4.2% ±0.3%	3.7% ±0%
\$15,000 to \$19,999	2.2% ±1%	3.7% ±0.2%	3.2% ±0%
\$20,000 to \$24,999	2.3% ±1%	4.1% ±0.3%	3.6% ±0%
\$25,000 to \$29,999	2.4% ±1.1%	3.9% ±0.3%	3.5% ±0%
\$30,000 to \$34,999	3.5% ±1.6%	4.8% ±0.3%	3.8% ±0%
\$35,000 to \$39,999	3.5% ±1.5%	4.3% ±0.2%	3.5% ±0%
\$40,000 to \$44,999	2.5% ±1%	4.3% ±0.2%	3.8% ±0%
\$45,000 to \$49,999	3.8% ±1.3%	4% ±0.3%	3.4% ±0%
\$50,000 to \$59,999	5.5% ±1.4%	7.5% ±0.3%	6.9% ±0%
\$60,000 to \$74,999	10.2% ±2%	9.9% ±0.4%	9.4% ±0.1%
\$75,000 to \$99,999	16.6% ±2.8%	13.5% ±0.4%	12.8% ±0%
\$100,000 to \$124,999	9.7% ±1.7%	9.3% ±0.4%	9.9% ±0.1%
\$125,000 to \$149,999	6.8% ±1.6%	6.2% ±0.3%	7% ±0%
\$150,000 to \$199,999	8.8% ±1.9%	6.6% ±0.3%	8.7% ±0%
\$200,000 or more	15.3% ±2.5%	7.5% ±0.3%	11.5% ±0.1%

The ACS 2022 1-year analysis here shows a high percentage (over 15%) of those households earn over \$200,000/year, about 2 times the state average, with a significant percentage of the overall population earning less than \$100,000. The following chart indicates that close to 9% of the households in Beaufort County moved from another state, some for retirement and some because of the ability to work remotely.





With the growth in population, in particular, with the in-migration of higher-income households to the area, housing prices have significantly escalated. The 2022 Census Reporter indicated a median value of \$463,200 for owner-occupied housing in Beaufort County, and 31% of all homes are valued between \$500,000-\$1M, more than double the rate of homes in this range for South Carolina as a whole. (The median home value for South Carolina is \$254,600 and \$320,900 for the United States.)

As predicted in the Bowen study, continued demand for housing and escalating prices in the area is making it more difficult for many working families to afford stable housing options in the region, particularly for workers in tourism and service sectors.



# Economic and Employment Analysis

## Economic Summary

The local Beaufort County economy is diverse but greatly influenced by tourism and nearby military bases. The three largest industry sectors in the county include Accommodations & Food Service (20.1%), Retail Trade (16.0%) and Health Care & Social Assistance (13.0%).

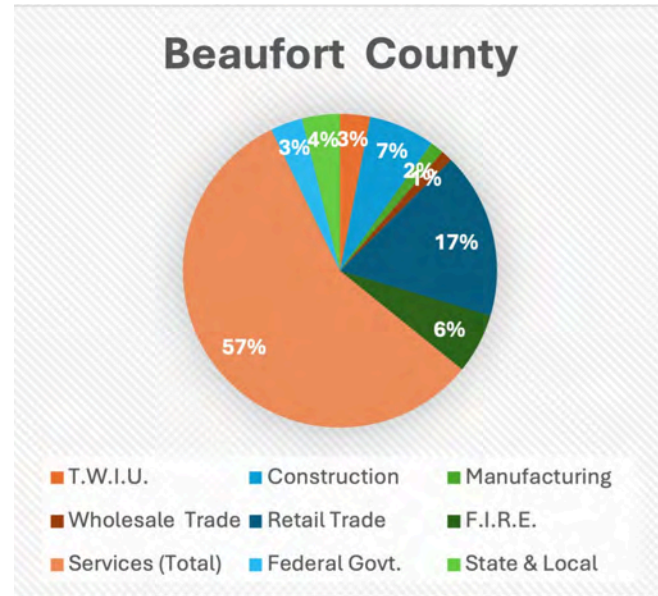
Beaufort County experiences a significant amount of tourism throughout the year due to its coastal location and the fact that it is the home of the Parris Island Marine Corps Recruitment Depot and the Marine Corps Air Station Beaufort. Between these two Marine installations and the family visitation and graduation ceremonies, they bring in nearly 200,000 visitors alone annually. The three previously mentioned industry sectors are also heavily-supported by tourism, and although the County is seeking to diversify the county's economy, tourism is still a lead employer for the area and will continue to be in the long-term. (Bowen)

Public and private sectors continue to invest in the local economy to spur economic growth in existing industries while cultivating the growth of new employment sectors. Based on the Bowen report, many of the new business openings and expansions reported fell within the service industry (as do the three largest job sectors for Beaufort County), which typically have low- to moderate wages, and should be considered when evaluating current and future housing development needs.

During interviews with employers as part of the Bowen study, employers indicated that a significant number of new job creation was anticipated to occur within positions at \$50,000 annual wages or less, as seven (7) of the 21 employers anticipate 10 to 50 new jobs to be created over the next five years in this annual wage range, further exacerbating the need for more affordable housing to match these income levels. The 2024 Chart below shows over 57% of the County's workforce within the Service Sector and 17% in Retail.





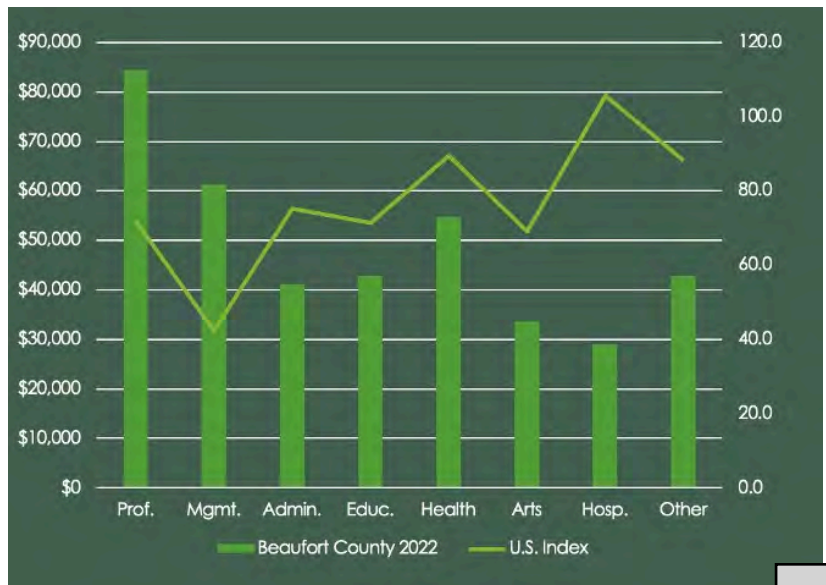


The following charts were shared as part the of Beaufort Chamber's 2024 Data dashboard presentation.

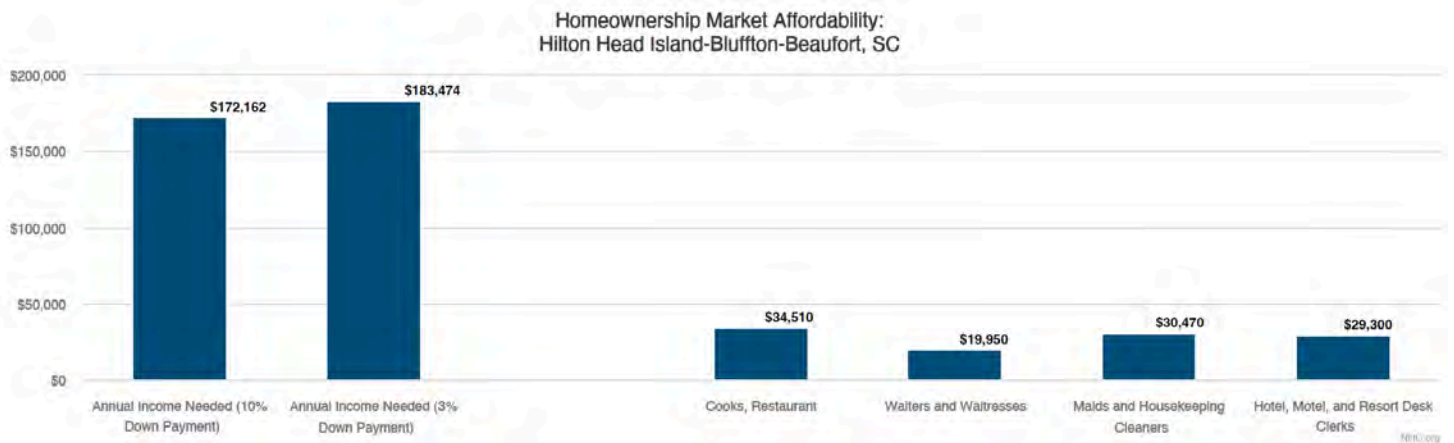
## Employment in Beaufort County by Sectors

Based on this chart, the highest participation employment sectors in the County tend to produce the lowest wages for its workers, with hospitality being the lowest paid sector but one of the top three employment sectors. Hospitality workers on average are making less than \$30,000/year, and other service sectors have lower incomes as well including administrators and educators. As part of the Bowen study, several employment sectors were interviewed. Teachers that responded to the survey stated they barely earn enough to afford rent and that they must work additional jobs and/or live with roommates to afford housing in Beaufort County.

Teachers also stated that wages have not increased at the same rate as housing and utilities, demonstrating the affordability problem is especially pronounced for beginning teachers, who have a low starting salary. As indicated in the Beaufort Chamber chart, average salaries for those in the education sector was just over \$40,000 in 2022.

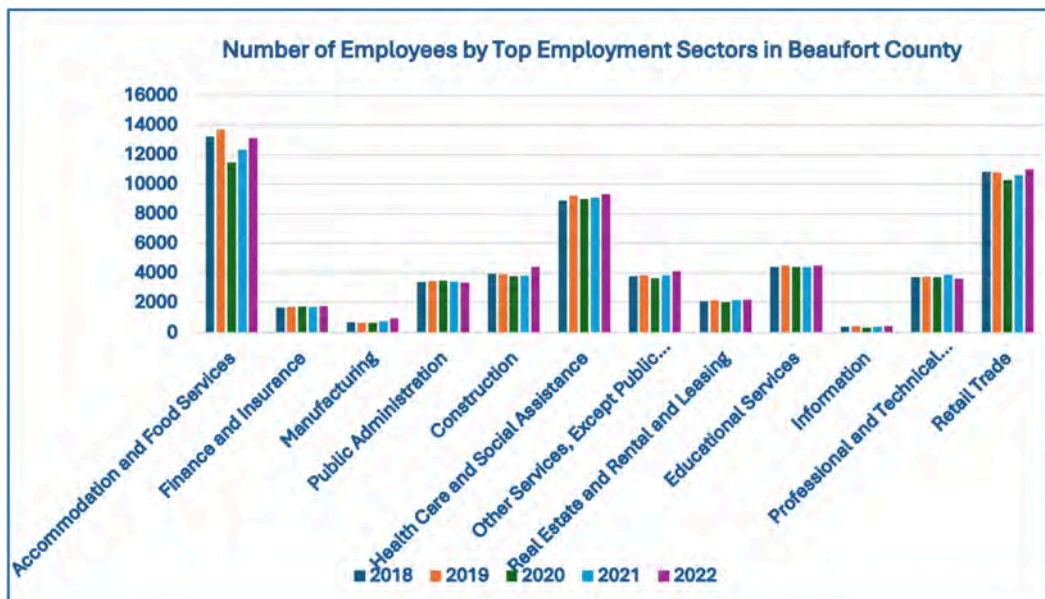
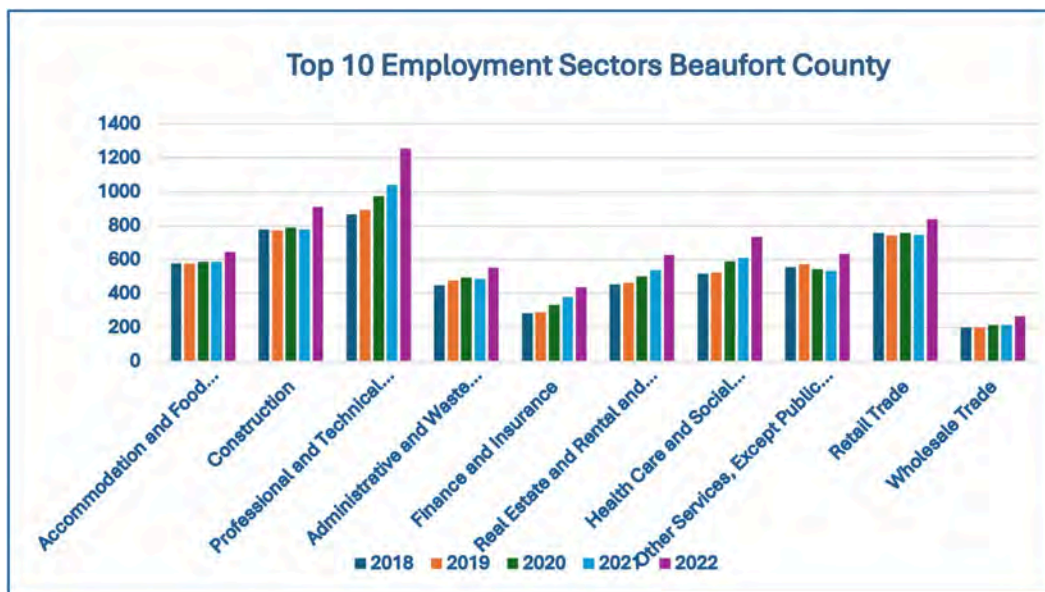


Based on the County's and the US Department of Housing and Urban Development's definition of affordable housing, a household that spends more than 30% of their income on housing - or more than three times their annual salary on buying a home, they are considered "cost-burdened". The following charts from the National Housing Conference's Paycheck to Paycheck analysis indicates that households need to earn over \$172,000 to afford the average home in Beaufort County and over \$46,000 to afford an average 3-bedroom apartment. The chart also highlights a significant gap between what income is needed and what - for example - employees in the service sector actually earn. None of the tourism positions listed below can afford a 2 bedroom apartment based on this analysis.

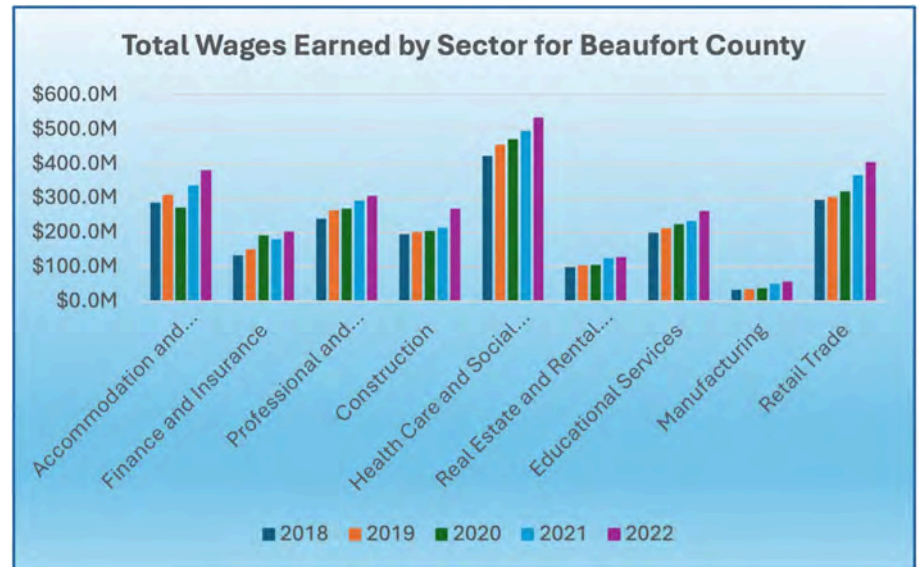




The 2024 Lowcountry Community Indicators Report - created by the Lowcountry Council of Governments (LCOG) in partnership with the Community Foundation of the Lowcountry (CFL) - is a centralized community resource highlighting key community indicators and trends in the lowcountry region including Beaufort County and its submarket municipalities within the County. The chart below created from the data in the report shows the top 10 employment sectors in Beaufort County and their establishment growth over a five-year period from 2018-2022. Accommodation and Food Service continues to be one of the number one employment sectors – employing over 13,000 residents - along with Retail, and Health Care, Professional Service, and Construction as additional top employment sectors.

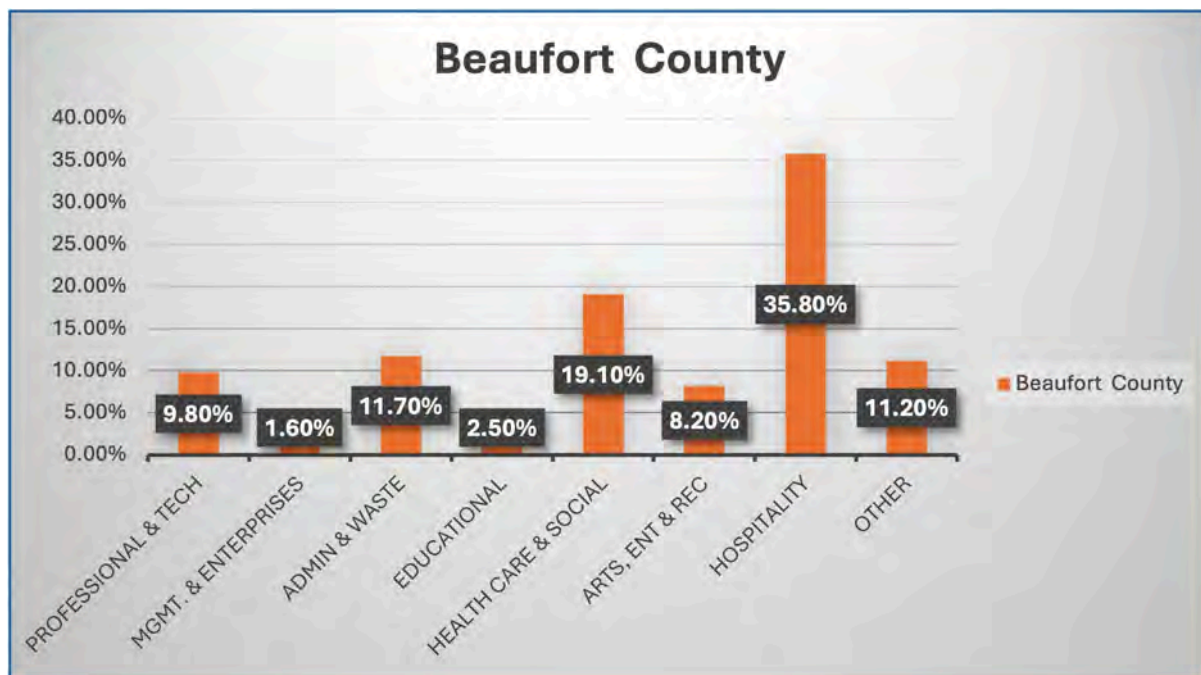


In addition to the significant number of individuals employed within these service sectors as highlighted above, the recent Beaufort Area Chamber of Commerce 2024 Data Dashboard report below indicated overall hospitality as one of the largest grossing employers in the County with Accommodations and Hospitality creating close to \$400M in area earnings just third to Health Care at \$500M and Retail at \$400M. A significant percentage of the County's economy comes from these three service sectors.



The recent Beaufort Area Chamber of Commerce 2024 Data Dashboard report indicated overall hospitality as one of the largest employers in the County.

**Service Sector Employment Breakdown: over 35% of the workforce is in Hospitality.**



The US Bureau of Labor Statistics May 2023 employment data below shows the average salary for the Beaufort Hilton Head area for overall leisure and hospitality which included food service and accommodations. The average salary based on the most recent data reported for the area was \$29,872, which was slightly higher than 2021 by 5.7%, but is nowhere near enough in annual wages to afford the current housing options within the County.

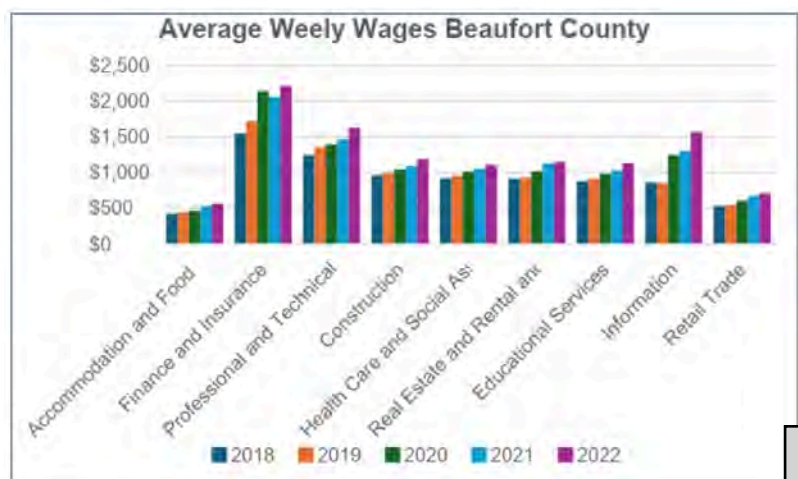
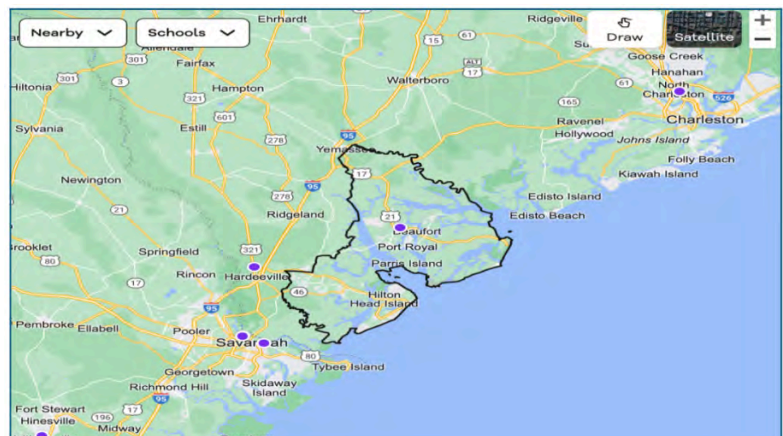
**Private, 1026 Leisure and hospitality, Beaufort County, South Carolina**

**Annual averages 2021 - 2022 , All establishment sizes**

**Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics**

Summary Change Table <a href="#">Hide</a>					
From: <input type="text" value="2021"/>	Annual Establishments	Annual Average Employment	Total Annual Wages	Annual Average Weekly Wage	Annual Wages per Employee
To: <input type="text" value="2022"/>					
2021 Levels	738	14,934	422,047,609	\$543	\$28,260
2022 Levels	765	16,069	480,014,187	\$574	\$29,872
Level Change From 2021 to 2022	27	1,135	57,966,578	\$31	\$1,612
Percent Change From 2021 to 2022	3.7%	7.6%	13.7%	5.7%	5.7%

Based on the US Department of Housing and Urban Development, a family should spend no more than 30% of the monthly salary for rental housing and no more than three times their annual salary of on homeownership to not be considered "cost-burdened". As mentioned earlier, the County also follows this threshold for their housing initiatives and programs. Based on this standard, a person working in the leisure and hospitality sector should spend no more than \$89,610 on buying a home and no more than \$746.80 for rent, yet - based on recent housing market data -there are few if any available options at these price points, with long waiting lists for government subsidized or assisted housing further depleting affordable options for workers. When conducting a search on Realtor.com for apartments in Beaufort County at \$750/month rent, only one available listing was found from WODA Cooper - an affordable housing developer who has been working in the region for the past few years. The only other options in this price range were found outside of Beaufort County.





As show on the previous page's Average Weekly Wage Chart Accommodation and Food Services incomes have remained relatively stagnant. The LCOG indicators report on average weekly income for this sector is about \$500/week compared to other major employment sectors in the region. With these low incomes and no affordable rental options, workers are forced to commute even further outside of the County to seek housing options.

### Employment Analysis:

The 2018 Bowen Housing Needs Assessment highlighted that key workforce sectors struggle to identify affordable housing options in the market for their employees. The area's strongest sector is tourism and entertainment/hospitality whose workers are the greatest housing cost -burdened, due to lower salaries. As mentioned in the study, this sector depends on workers that can live on a lower wage. Therefore, a big challenge for these employees is the lack of affordable housing options throughout Beaufort County. There are few affordable housing choices across the County especially near job centers, therefore employees are forced to commute longer distances to employment opportunities. Interviews with local sources in the 2018 study, indicated the lack of affordable and moderate-income housing in the area is a deterrent to new companies interested in moving to the area, due to the uncertainty of available housing for their employees.

A recent market analysis conducted by Ronald Brown Research & Analysis for an affordable housing project submitted to the state for low-income housing tax credit project (LIHTC) for Beaufort County indicated a large percentage of workers commuting from several other counties to work in the area. The study highlighted that hospitality and service sector employers depend on low to moderate income workers who may have to drive longer distances for housing options. As noted in this chart from the Analysis, several workers are commuting from as far as Charleston and Dorchester Counties as well as Chatham County, GA. Adjacent county Jasper County has the greatest numbers of commuters. As Jasper County continues to grow many of these worker may choose to work in Jasper verses Beaufort as more jobs and businesses come to this area where many workers already live, which could mean a decline in workers for Beaufort County businesses.

Working in Beaufort County 41,534

Where Beaufort County residents are commuting to:

Charleston County, SC	2,909
Chatham County, GA	2,849
Jasper County, SC	2,664
Richland County, SC	1,612
Greenville County, SC	1,214
Lexington County, SC	868
Horry County, SC	676
Berkeley County, SC	549
Spartanburg County, SC	495
Elsewhere	6,472

Where Beaufort County workers are commuting from:

Jasper County, SC	4,105
Chatham County, GA	1,901
Charleston County, SC	1,708
Dorchester County, SC	1,129
Hampton County, SC	901
Berkeley County, SC	858
Colleton County, SC	801
Orangeburg County, SC	706
Richland County, SC	693
Elsewhere	7,665

## Cost Burdened:

As part of the Bowen report analysis, researchers conducted extensive outreach and analysis on the existing availability of both subsidized and unsubsidized affordable housing and determined at the time there were virtually no vacant units among the surveyed Tax Credit and government subsidized rental product that is intended to provide affordable housing in the County, and a relatively small inventory of for-sale product was priced under \$200,000.

As a result, many lower-income households have to choose from various market-rate rental or higher priced for-sale housing alternatives that are not considered affordable to many of these households. Households that are “cost-burdened” (typically paying 30% or more of their income towards housing costs) or “severe cost-burdened” (typically paying 50% or more towards housing costs) often find it difficult paying for both their housing and meeting other financial obligations. The same study conducted by T Ronald Brown in 2023 indicated close to 50% of area’s renters are considered cost-burdened.

**Table 17 - Household Income, Renter Households**

Income	Overburdened Renters			
	Number	Percent	Number	Percent
Up to \$10,000	443	9.3	201	9.2
\$10,000 - \$19,999	337	7.1	303	13.9
\$20,000 - \$34,999	466	9.8	428	19.7
\$35,000 - \$50,000	730	15.4	574	26.4
\$50,000 - \$75,000	901	19.0	473	21.7
\$75,000 - \$100,000	790	16.6	126	5.8
\$100,000 and over	1,087	22.9	71	3.3
Total	4,754		2,176	

Source: 2016 to 2020 American Community Survey; T.Ronald Brown: Research & Analysis

Even the most recent US Bureau of Labor Statistics report for the Beaufort Area for May 2023 , indicates employees in the Accommodations and Food Service sector are severely limited in housing choices based on median incomes. The following chart indicates what these employees in these key positions could afford without being considered cost-burdened. The chart shows both affordable rental and ownership ranges for each of these positions based on spending no more than 30% of their income on housing. The challenge for these employees is there are few housing options in the area within these price ranges, which will be highlighted in more detail in the Housing Market Chapter of this Housing Impact Analysis.

Select Accommodations and Food Service Positions				
May 2023 Occupation HHI-Bluffton-Beaufort Area	Hourly MEDIAN	Annual MEDIAN	Affordable Rental (30% Income)	Affordable Ownership (3x Annual Salary)
Food Service Managers	\$ 30.26	\$ 62,930.00	\$ 1,573.25	\$ 188,790.00
Lodging Managers	\$ 37.06	\$ 77,090.00	\$ 1,927.25	\$ 231,270.00
Chefs and Head Cooks	\$ 29.33	\$ 61,000.00	\$ 1,525.00	\$ 183,000.00
Cooks, Restaurant	\$ 16.59	\$ 34,510.00	\$ 862.75	\$ 103,530.00
Bartenders	\$ 8.78	\$ 18,270.00	\$ 456.75	\$ 54,810.00
Waiters and Waitresses	\$ 9.59	\$ 19,950.00	\$ 498.75	\$ 59,850.00
Dining Room and Cafeteria Attendants and Bartender Helpers	\$ 11.12	\$ 23,130.00	\$ 578.25	\$ 69,390.00
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	\$ 12.75	\$ 26,520.00	\$ 663.00	\$ 79,560.00
Landscaping and Groundskeeping Workers	\$ 17.56	\$ 36,520.00	\$ 913.00	\$ 109,560.00
First-Line Supervisors of Housekeeping and Janitorial Workers	\$ 21.93	\$ 45,620.00	\$ 1,140.50	\$ 136,860.00
Maids and Housekeeping Cleaners	\$ 14.65	\$ 30,470.00	\$ 761.75	\$ 91,410.00
Baggage Porters and Bellhops	\$ 11.78	\$ 24,510.00	\$ 612.75	\$ 73,530.00
Concierges	\$ 20.05	\$ 41,700.00	\$ 1,042.50	\$ 125,100.00
Hotel, Motel, and Resort Desk Clerks	\$ 14.09	\$ 29,300.00	\$ 732.50	\$ 87,900.00
*bls.gov				
*Note these estimates are based on a one-person income				

At the time of the Bowen study, among Beaufort County's renter households, a total of 9,370 (47.4%) were cost burdened and 3,883 (19.6%) were severely cost burdened. In South Carolina, these ratios are 45.7% and 23.3%, respectively. A total of 15,463 (33.5%) owner households were considered cost burdened, while 6,613 (14.3%) were severely cost burdened. This extensive study also highlighted that few new affordable housing units have been built within the County. The greatest shares of severe cost burdened renter households were in the City of Beaufort (21.8%) and the Northern Unincorporated (21.6%) submarkets, while the greatest share of severely cost burdened owner households are within the Town of Hilton Head Island (18.8%) and City of Beaufort (16.0%) submarkets.

As such, a key recommendation from the Bowen report was to preserve the existing stock of affordable housing and expand affordable housing alternatives as critical for the growth of Beaufort County's future housing plans. Early 2024, the County committed funding to the Coastal Community Development Corporation (CCDC), a new nonprofit focused on workforce housing to support increased preservation of affordable rental units.

With limited new affordable housing developments within the county leading to a community starved of affordable housing options for many years, preservation will be critical as the County plans for new affordable developments moving forward.





Based on analysis during the Bowen report - which identified and personally surveyed 60 multifamily rental housing projects containing a total of 5,963 units within the overall county, the last government subsidized affordable housing project was built before 2017. These projects have an overall 97.6% occupancy rate, indicating that there is limited availability among the multifamily rental housing supply and overwhelming demand from the community. The non-subsidized units (market-rate and non-Tax Credit) are 97.2% occupied, while the government subsidized units are 100.0% occupied. With 139 of the 142 vacant units identified in the market among the market rate supply, there were virtually no vacancies among affordable rentals that served low-income households through programs such as the Low-Income Housing Tax Credit (LIHTC) program or a government subsidy.

Government Subsidized			
Year Built	Projects	Units	Percent Share
Before 1970	-	-	-
1970 to 1979	7	421	51.8%
1980 to 1989	5	228	28.1%
1990 to 1999	2	68	8.4%
2000 to 2005	1	35	4.3%
2006 to 2010	-	-	-
2011 to 2015	1	60	7.4%
2016	-	-	-
2017*	-	-	-

\*As of December

Based on Bowen interviews at the time with area apartment managers, many affordable rental properties maintain long wait lists, and a recent interview with staff at Beaufort County Health and Human Services indicated that they have over 1,000 individuals seeking housing at any given time. At the time of the study, the Beaufort Housing Authority indicated that over 1,100 families were on their waiting list for housing within the County. Since the Bowen study was completed, no additional low-income housing tax credit apartment communities have been approved within the County.



## Housing Needs for Employees:

During the Bowen study, employers were asked to rank the degree of need (low, moderate and high) for housing for their employees in terms of product type. Respondents reported that the highest need based on product type are single-family homes (42.1%), multifamily apartments (31.6%) and duplex/townhomes (22.2%). It's notable that employers ranked the lowest need of housing by product type as mobile homes (63.2%), short-term/seasonal housing (47.4%) and dormitories/shared living (33.3%).

Employers were also asked to rank the degree of need for housing in terms of product pricing. Respondents reported that the highest need based on product pricing are entry level/workforce for-sale housing (below \$150,000), affordable rental housing (under \$750/month) and moderate market-rate rental housing (\$750-\$1,250/month) as the next greatest need. It's notable that employers ranked the lowest housing priority need by product pricing as higher-end market-rate rental housing (above \$1,250/month), higher-end for-sale housing (above \$250,000) and moderate for-sale housing (\$150,000-\$250,000) and the next greatest need.

In terms of addressing housing needs for employers in Beaufort County, employers were also asked to rank the level of importance for any future government housing programs, policies, or incentives that could be implemented to assist employees with the accessing affordable housing. Respondents ranked the most important focus areas as new housing development/redevelopment (57.9%), renter assistance (38.9%) and housing assistance for public employees (36.8%).





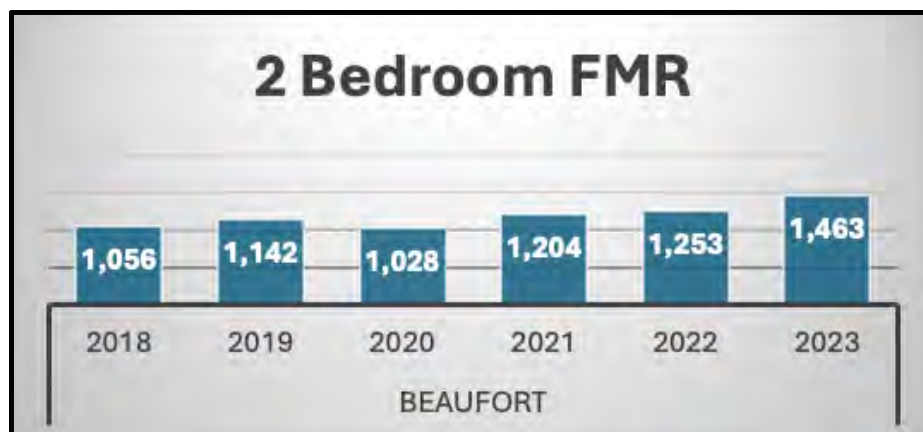
# Housing Market Analysis/Conditions

## Rental Market

The 2018 Bowen study indicated the lack of housing was most prevalent among housing that serves moderate-income households, (generally earning between 80% and 120% of AMI) and lower-income household segments (generally earning below 80% of AMI). While vacancy rates were low among all rental housing segments, there were very few vacancies among product that serves lower-income households through Tax Credit projects that had an overall vacancy rate of just 0.3% and government-subsidized product - with a vacancy rate of 0.0%. As mentioned earlier, according to the Beaufort County Housing Authority, the wait list for households to get a Housing Choice Voucher consists of approximately 1,100 households.

Feedback from area stakeholders and employers interviewed as part of the Bowen study indicated that affordable rental housing for low- to moderate-income households and - in particular - the service industry (i.e. retail, hospitality, restaurant workers, etc.) and public service workers (i.e. police officers, fire fighters and teachers) should be an area of focus for future housing development. The Bowen report also recommended that future housing plans address affordable rental housing for households with incomes between 80% and 120% of AMI and lower-income households earning up to 80% of AMI. Despite these recommendations, post 2018, little affordable housing has been added to the market over the past five years due to the lack of new tax credit or subsidized projects being approved, and the loss of existing naturally occurring affordable rental housing (NOAH), creating an even bleaker outlook for Beaufort County's affordable rental market today.

According to the recent Lowcountry Community Indicators Report by LCOG, fair market rent for a 2-bedroom apartment was \$1,463 in 2023 (which requires at least \$58,520 annual salary (approximately \$28/hour) – a 39% increase since 2018 and a 17% increase just since 2022.



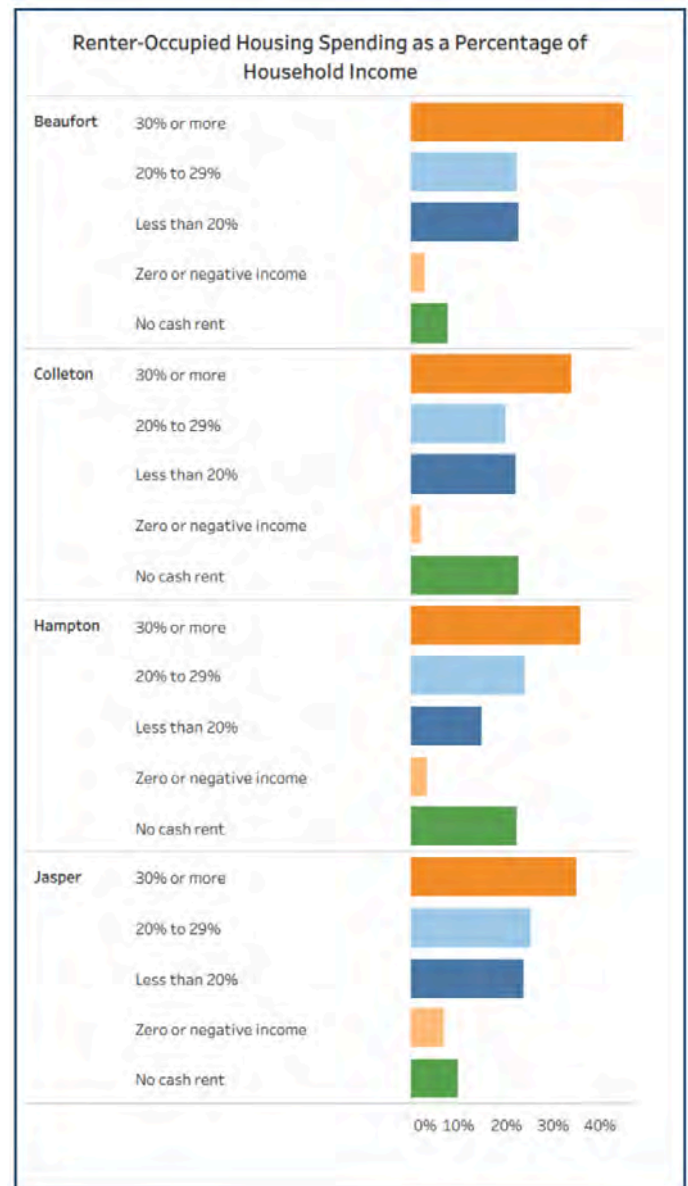


Over 64% of all rental units are priced above \$1,000/month, and 45% of renters in Beaufort County are cost-burdened and spending more than 30% of their monthly income on housing – the highest in the four-county region including Colleton, Hampton, and Jasper Counties. Furthermore, a December 2023 Market Study for a Low-Income Housing Tax Credit (LIHTC) development in the Town of Bluffton found that the median renter income for Bluffton and Beaufort County was \$36,889 and \$49,177 respectively, between \$16,000 and \$9,000 less than what is needed to afford a 2-bedroom FMR unit in Beaufort County.

Compared to other adjacent counties, the chart to the right shows Beaufort County as the most cost-burdened community in the region based on the recent LCOG report, with Jasper and Hampton Counties not far behind.

The same 2023 Market Study of a Low-Income Housing Tax Credit (LIHTC) development in Bluffton found that – of the eligible renter households in that project market area – as many as 91.9% of the 40% AMI renter households, 78.6% of the 60% AMI renter households, and 57.4% of the 80% AMI renter households are cost-burdened and hence would benefit from affordable rental options. The study also found that by 2026 there will be a need of approximately 1,844 new units of affordable rentals – at the 40%, 60%, and 80% AMI ranges - in the Bluffton area and that the proposed 120-unit Livewell Terrace Apartments project will satisfy only 6% of that total demand. Two LIHTC projects currently underway in the County, Garden Oaks and Pintail Pointe, will provide approximately 370 affordable units, yet not nearly enough to meet growing demand.

In the 2024 recent LIHTC round no Beaufort County projects were submitted for final consideration.



While 2,234 affordable rental units have been created using LIHTC financing since 1988, additional funding sources will need to be leveraged in order to scale up affordable development to meet the growing demand in the Beaufort County region. South Carolina State Housing Finance did not offer a tax credit round in 2023 and will be accepting submissions for 2024 at the end of May. Beaufort County should stay involved in the 2025 QAP process to promote the county as a high demand area as the need for more housing continues to grow.

The Tischler Bise study revealed, Beaufort County will have 41,257 new permanent residents and 18,962 new housing units by 2029 – a 22% and 20% increase from 2019. However, only 25% of those new housing units are projected to be multi-unit structures which are more capable of housing this influx of new residents in higher-density developments. This is a concerning trend nationwide where multi-family affordable rentals are drastically underdeveloped. Beaufort County is no different where 2 Unit and 3-4 Unit residential structures saw a 59% and 17% decline in production from 2010 to 2022, and there has been only a marginal increase in production of 2% and 4% respectively from 2020 to 2022.

The following chart from the LCOG Indicators report highlights these discrepancies between single family and multifamily developments in Beaufort County since 2000.

		2000	2010	2020	2022	Change 2000-2010	Change 2010-2020	Change 2020-2022
Beaufort	1-Unit, detached	34,893	53,717	62,665	63,327	53.9%	16.7%	1.1%
	1-Unit, attached	3,279	4,782	6,469	5,296	45.8%	35.3%	-18.1%
	2 Units	1,052	1,486	617	627	41.3%	-58.5%	1.6%
	3-4 Units	2,759	3,314	2,749	2,848	20.1%	-17.0%	3.6%
	5-9 Units	2,956	5,508	5,201	5,163	86.3%	-5.6%	-0.7%
	10-19 Units	1,443	3,186	3,903	3,972	120.8%	22.5%	1.8%
	20 or more Units	5,035	7,796	9,522	8,357	54.8%	22.1%	-12.2%
	Mobile Homes	9,001	9,289	9,660	9,396	3.2%	4.0%	-2.7%

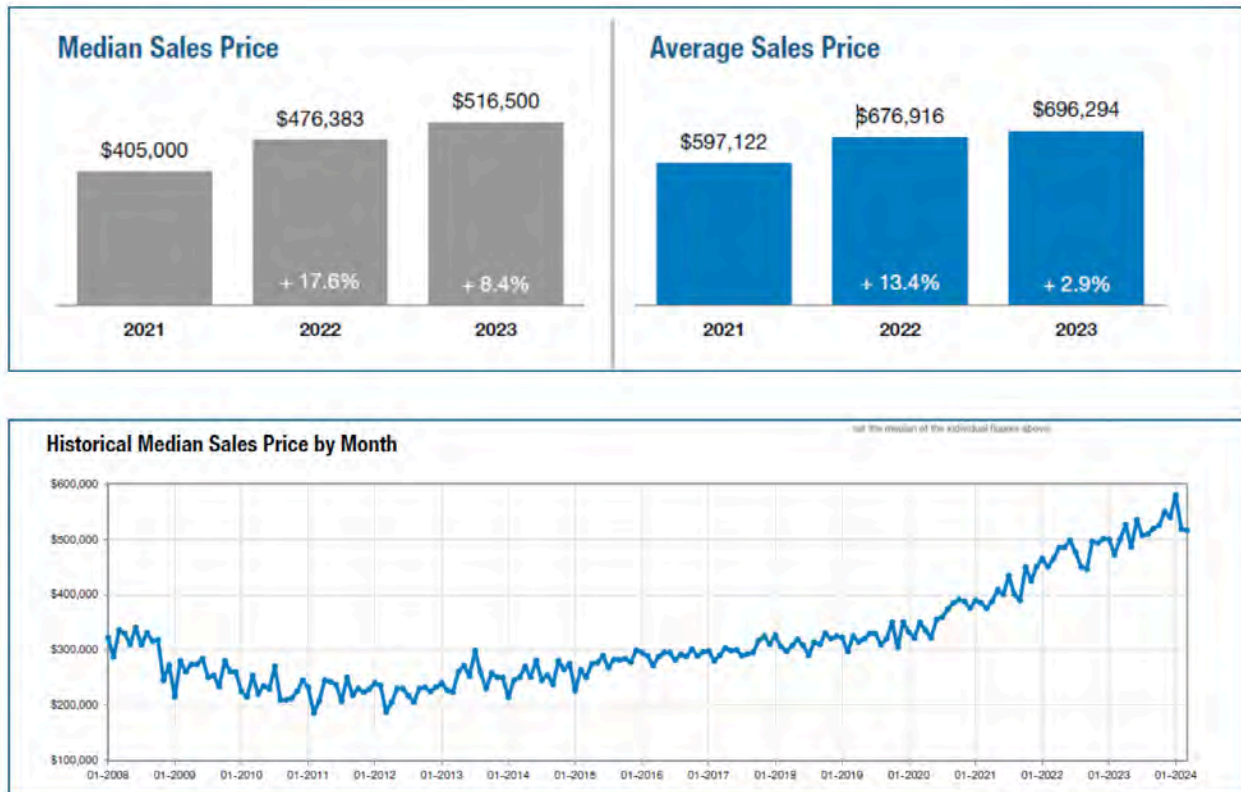
(<https://www.lowcountrycommunityindicators.org/>)



## Homeownership

The 2018 Bowen study also pointed out at the time of the report that nearly three-fourths (70.4%) of the available for-sale product was priced at \$300,000 or higher, yet this price point is not affordable to half of the households in the county. At the time of the study, there were approximately 386 available for-sale housing units priced between \$150,000 and \$250,000, yet the number of households that would have enough income (\$50,000 to \$74,999) to afford this price range was estimated to grow to over 800 households over the five years. Therefore, the existing inventory of product priced between \$150,000 and \$250,000 was insufficient to meet the projected need in 2018, and this gap in available affordable housing stock has widened in the region post-pandemic.

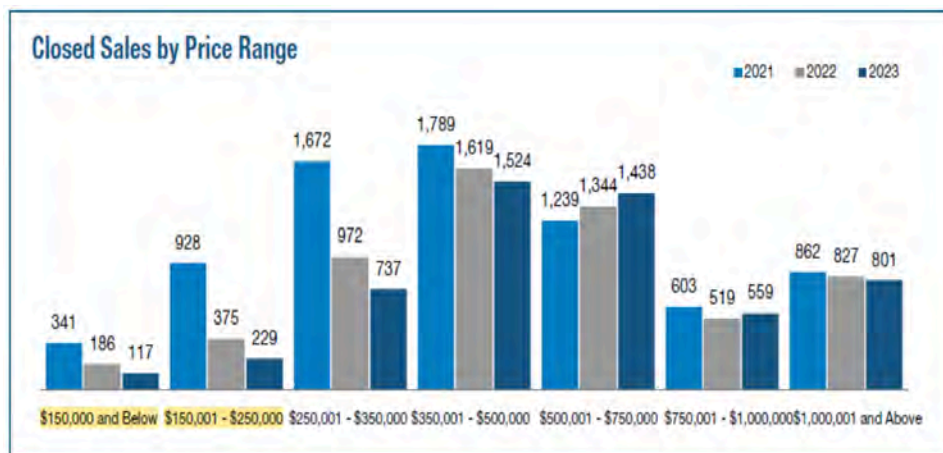
The Hilton Head Area Realtors Association, which tracks the county's housing market trends, estimated - as part of their 2023 Year-End Market Trend Analysis - a continued increase in the costs of homeownership for the Beaufort County region largely due to a 2-decade high mortgage rate increase – hovering around 7%, a historically-low housing inventory, and a continuing trend of increased sales prices. As shown below, the overall median sales price increased 8.4 percent to \$516,500 for the year – with detached home prices up 4.5 percent and attached home prices up 15.3 percent from 2022. Average sales prices, indicated in the chart below, were close to \$700,000 for the County. The Historical Median Sales price by month also shows this continued trend in escalating home prices.



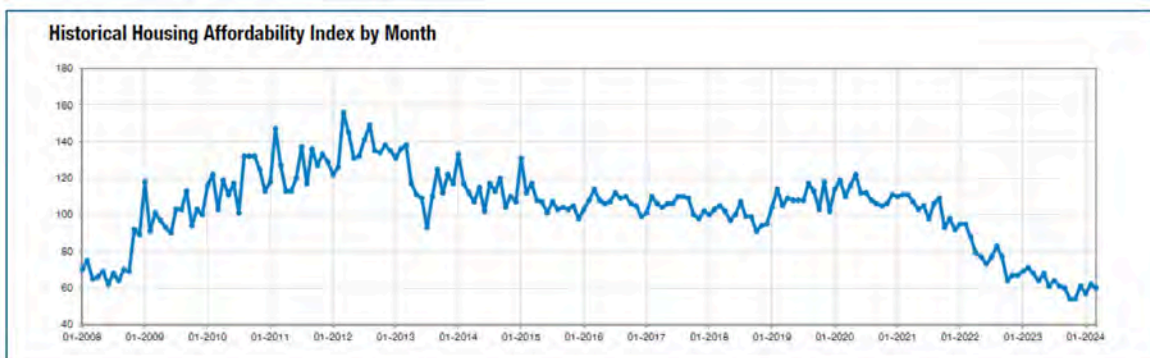
The number of housing units that sold below \$250,000 continued to decline in 2023 – consistent with a trend since 2021 – indicating a prolonged deficit in the affordable housing inventory for Beaufort County. The above graph shows that prices have continued to increase rather than stabilize. In the Bowen Housing Gap Estimates, they predicted a demand for a variety of product at a wide range of affordability levels, including housing for both low- and high-income households, from both rental and for-sale product. Without the introduction of a sufficient number of housing units, the already limited availability of housing units will become scarcer.

The Closed Sales Chart shows a 65% and 75% decline in homes sold below \$150,000 and between \$150,001 and \$250,000 – respectively - since 2021, which is consistent with the Bowen study predictions due to limited inventory below \$300,000.

Recent data from March 2024 shows little improvement in the affordable sales inventory from March 2023 with no change in the number of new single-family listings at \$150,000 or below and only a 5 unit increase for those properties listed between \$150,001 and \$250,000.



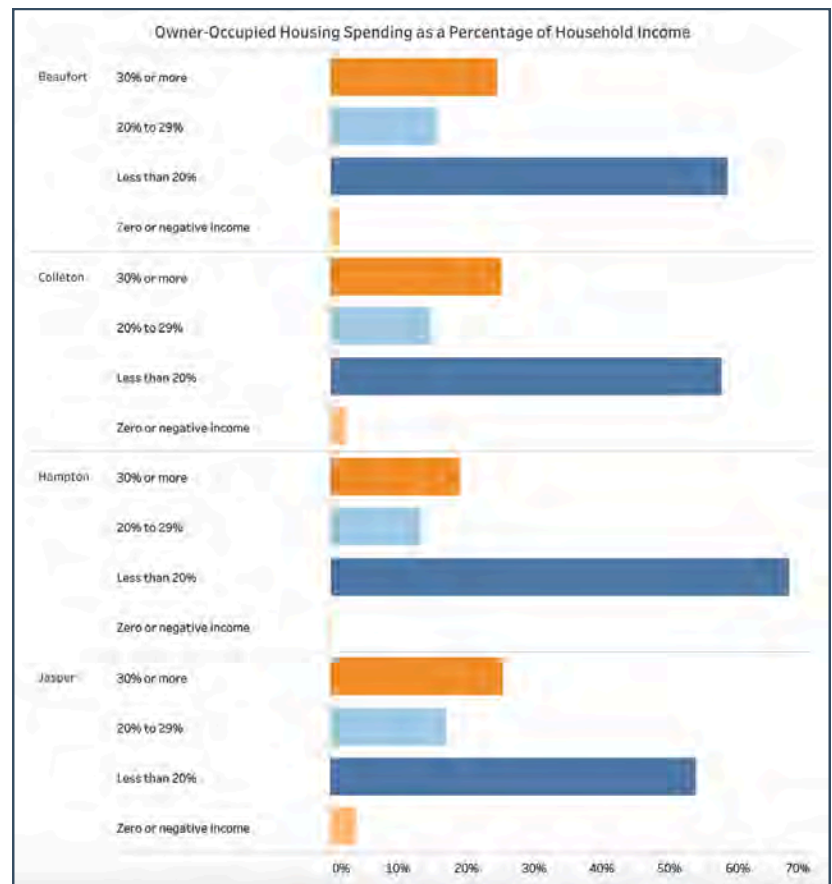
In addition, the Housing Affordability Index – a measure of the necessary median household income to qualify for the purchase of median-priced home in a region – has continued to decline for Beaufort County since 2022. With a higher number meaning greater affordability, the Index is currently at 60 - a 12% decline from last year, a 32% total decline since 2022, and a notable decline even from the time the Bowen study was completed in 2018.





2022 data from the Lowcountry Council of Governments also confirms that 1 in 4 Beaufort County homeowners are cost-burdened for housing - spending 30% or more of their monthly income on housing-related expenses – while 70% of those homeowners have monthly mortgages of \$1,500 or more. Meanwhile, median household income decreased by .5% in 2022 – when adjusted for inflation. Jasper and Colleton counties are not far behind in terms of homeowners that are cost-burdened as both are also close to 30% of households spending more than 30% of their income on housing. This report also shows very few ownership opportunities below \$200,000 compared to higher end homes within Beaufort County as highlighted below.

Despite the paucity of affordable homeownership opportunities, March 2024 key data metrics below shows overall inventory of homes on the market in Beaufort County increased 45% with months' supply of inventory increasing by 55% - to 3.4 months – since March 2023, a promising upward trend in overall housing stock that could drive down home prices in the future as supply grows.



Key Metrics	Historical Sparkbars	03-2023	03-2024	Percent Change	YTD 2023	YTD 2024	Percent Change
Inventory of Homes for Sale		1,016	1,469	+ 44.6%	--	--	--
Months Supply of Inventory		2.2	3.4	+ 54.5%	--	--	--

Additional data from the Beaufort Jasper Realtors Association (BJRA) indicates that pricing continues to escalate even with an increase in inventory. The following charts show increased median sales price up +1.8% from March 2023 to 2024, the average sales price up +4.5% for the same period in the first quarter of 2024, and the affordability index declining 6.2% over the same period. Pending sales for March 2024 were also up 18.7% from 2023. So, despite a growth in inventory and increased sales it is mainly higher priced homes selling with few below the \$200,000 sales price.



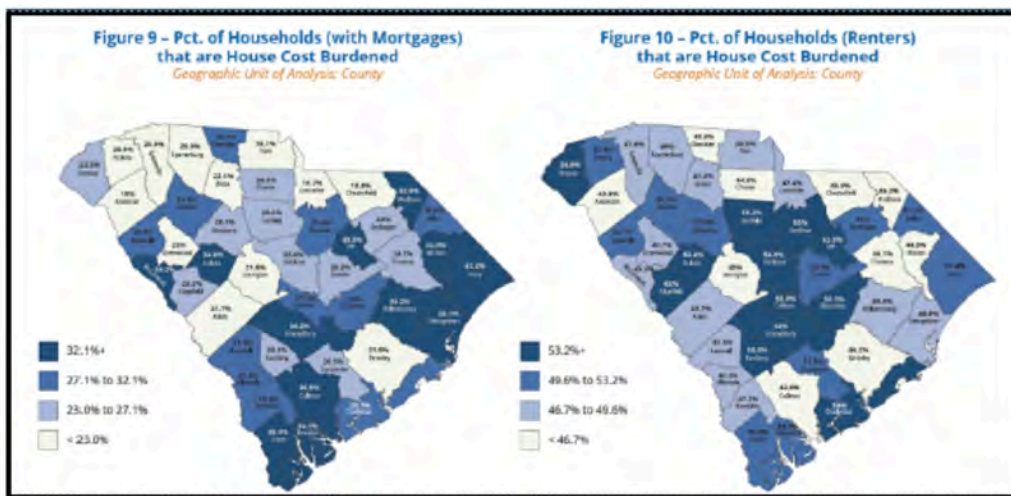
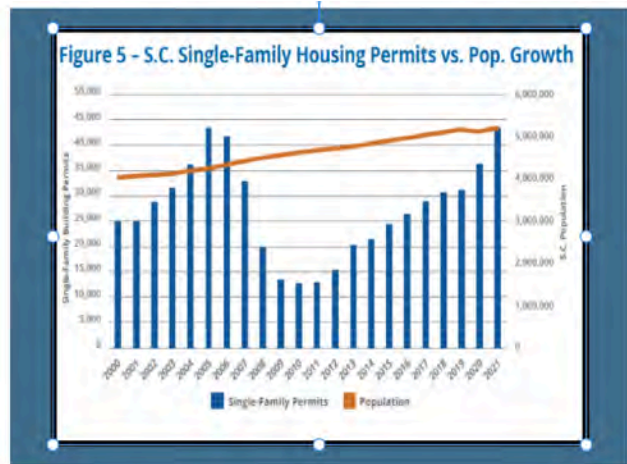
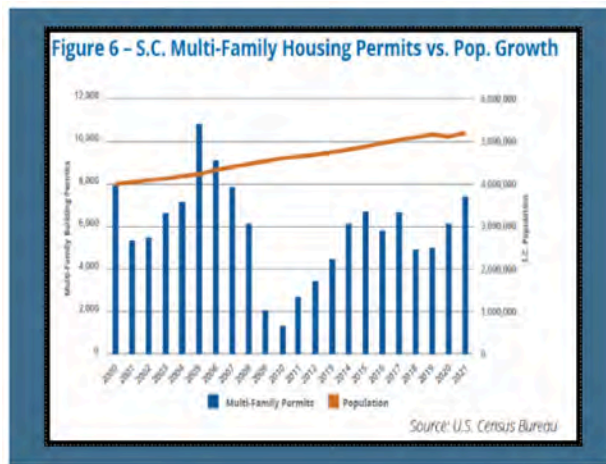
## Housing Market Conditions

Although the South Carolina population continues to have strong growth, building has not kept up. The 2023 Palmetto State Housing Study published by SC State Housing indicated that a decade of underbuilding has culminated in a shortage of housing inventory. South Carolina's population has grown steadily at an average annual rate of roughly 1.2% from 2002 to 2021 (compared to 0.8% for the overall US), and in 2023 its population grew the fastest in the nation – at a 1.7% increase from the previous year. Yet, the average annual growth rate in the number of new housing permits in South Carolina dropped by nearly half after the Great Recession of 2008.

The decline includes both single and multi-family housing, thereby creating gaps in the supply and demand for housing and escalating the cost of housing due to the shortage of supply. The lack of housing inventory in South Carolina is especially pronounced among lower price points. Although a lack of demand in the immediate aftermath of the Great Recession helped temporarily increase the availability of entry-level homes, the number of homes sold in South Carolina for less than \$100,000 has decreased by 14.8 percent each year since 2014. (2023 Palmetto Study) The decrease in supply is most pronounced in coastal regions of South Carolina. In 2022, the percentage of homes sold in South Carolina for under \$100,000 fell below 5 percent for the first time. The 2023 Palmetto Housing Study, as shown in the charts below, reveals that South Carolina's housing market is imbalanced due to high demand and low inventory levels. This imbalance has resulted in affordability challenges for many South Carolinians.

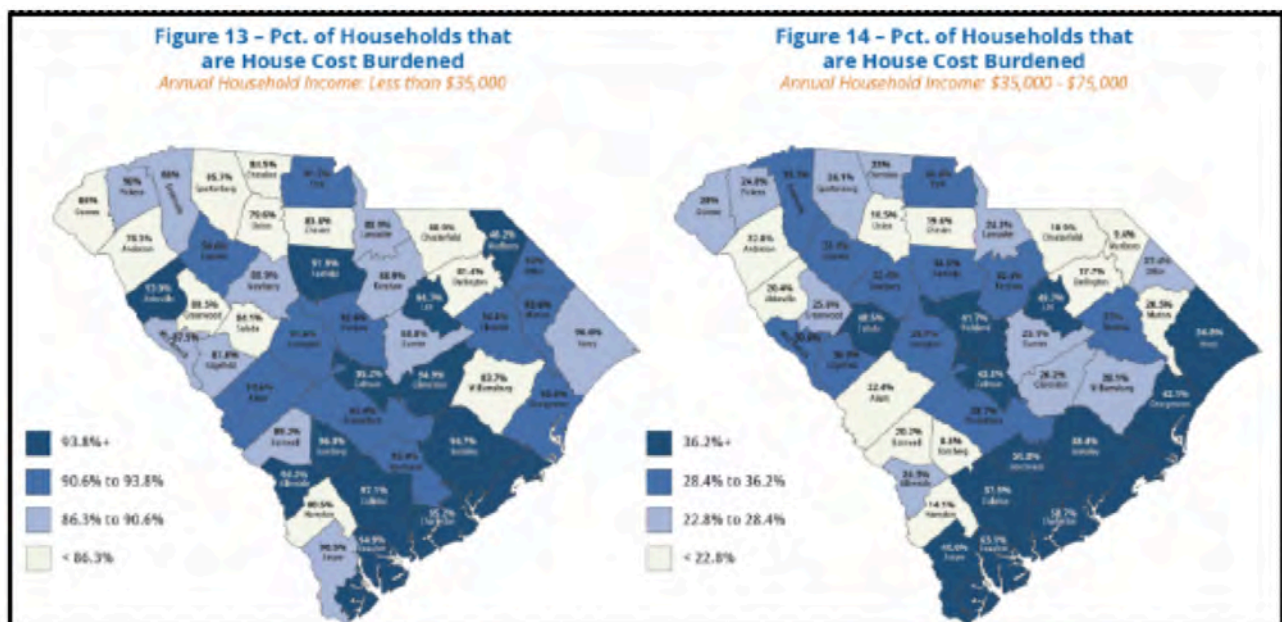


As mentioned earlier, housing affordability is usually measured by examining the extent to which families are considered to be housing cost-burdened, therefore approximately 50 percent of renting households and 25 percent of households with a mortgage are housing cost-burdened in South Carolina. Examining housing cost burdens by county reveals that renters are most likely to be cost-burdened in the Midlands and coastal regions of South Carolina. By contrast, households with mortgages are most likely to be cost-burdened in the Pee Dee and coastal regions, as shown in Figures 9 and 10. On average, housing cost burdens across the state are higher for renters than they are for households with mortgages.



Housing affordability is often considered to be a challenge that is either mostly or exclusively concentrated among households with lower income. Approximately 90% of South Carolina's lower income households, defined as those earning less than \$35,000 annually are estimated to be housing cost-burdened based on the 2023 Palmetto Housing Study. However, in South Carolina there is also a significant population base of middle-income households that also face affordability challenges. Specifically, this study estimates that more than one-third (34.5%) of households earning between \$35,000 and \$75,000 annually are also housing cost-burdened by traditional measures. Existing statewide workforce housing initiatives are often designed for this population.

The cost burden for this segment of the population is especially high in coastal South Carolina as shown in Figures 13 and 14. The data demonstrates that housing affordability is nearly a universal challenge for lower-income and working-class families and households. Policies directed at improving housing affordability should also include attainable housing programs and new inventory for middle-income families -including individuals often employed as teachers, first responders, and health care support workers.





Escalating real estate costs are not the only barrier to homeownership. Increased mortgage rates continue to limit affordable home buying opportunities for families. Since August 2023, interest rates have risen to as high as 8% depending on the loan type, the amount of down payment provided and also takes into consideration a varying credit score between 580-800. These variables make home buying more difficult for lower income households that have limited downpayment and lower credit scores.

The affordability index (the lower the number the less affordable a market) for Beaufort and Jasper counties collectively continues to decline making the impact on housing options for Beaufort workers even more challenging as neighboring counties are also seeing a decline in affordability. The chart below shows significant regional decline in affordability even since the 2018 Bowen study. As mentioned earlier many workers commute from Jasper County to work in Beaufort, yet housing pricing are increasing in that market as well creating a broader regional housing crisis.



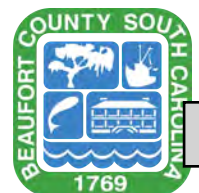
\*Beaufort-Jasper County Realtors Association (BJRA)

Even more telling in the loss of regional affordability is the March BJRA Housing Supply Overview which indicated that for the 12-month period spanning April 2023 through March 2024 pending sales in the Beaufort-Jasper County REALTORS® region were down 0.1 percent overall, but the price range with the largest pending sales gain were for homes \$1,000,001 and above, where sales rose 38.5 percent.

## Inventory of Homes for Sale

### By Price Range

■ 3-2023 ■ 3-2024



With a per capita income of \$72,142 (BEA, 2022) and a median home sales prices of \$522,500 based on a recent Redfin 2024 report, the typical homebuyer in Beaufort County has very little opportunity to buy an affordable home that meets their budget. A \$200,000 home could cost a household \$1,754/month – assuming a 3% down payment and \$449/month in property taxes, homeowners insurance, and private mortgage insurance (PMI). [Nerd wallet] This monthly payment would also depend on the buyer's credit score. Therefore, the average resident (based on above per capita income) in Beaufort County could barely afford a \$200,000 home.

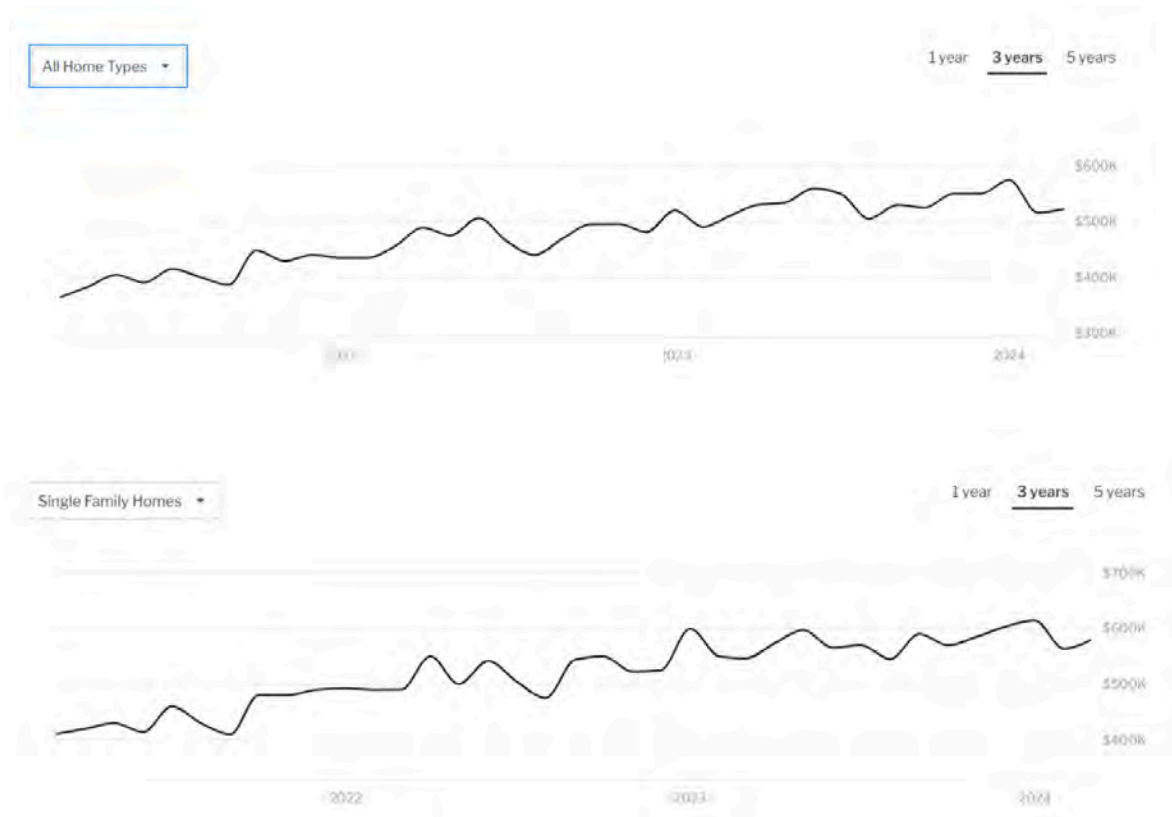
Based on Nerdwallet.com, current mortgage rates on average for the area are over 7 % for a 30-year fixed mortgage and 6.50% for a 15-year fixed mortgage, but - as mentioned - this depends on downpayment and credit score. Many lower income workers do not have significant savings for a down payment and may have credit issues making it harder for them to transition to ownership, especially if they are already cost-burdened and paying higher rents. The below chart shows mortgage interest based on current Annual Percentage Rates (APR).

Product	Interest Rate	APR
30-Year Fixed Rate	7.08%	7.13%
20-Year Fixed Rate	6.85%	6.91%
15-Year Fixed Rate	6.54%	6.62%
10-Year Fixed Rate	6.42%	6.50%

In addition to a limited pipeline of newly planned affordable homeownership options for the area and the low inventory of existing housing units, increased cost in wind and flood insurance are also impacting overall household's costs in Beaufort County. In some cases, insurance costs have doubled for residential and commercial properties, pricing people out of their homes. For the rental market, insurance premiums are passed along to renters by apartment owners therefore increasing the cost of rent for many families, while incomes have not kept up with housing costs. In some cases, rental property owners have converted their "previously affordable" rental properties into higher cost luxury apartments or short-term rentals, taking them out of the affordable housing inventory.

In March 2024, Beaufort County home prices were up 2.6% compared to last year, selling for a median price of \$523K. On average, homes in Beaufort County sell after 50 days on the market compared to 38 days last year. There were 495 homes sold in March this year, up slightly from 463 last year. (Redfin.com). Based on this recent data pulled from Redfin calculations of home data from MLS listings and public records the following charts show the continued rise in housing cost over the last 3-year.

The Charts include 1) All Home Types listed (villas, condos, townhomes and detached) and 2) Single Family Homes separately. The chart below shows overall housing types (condos, townhomes and single-family ownership) showing a trend of 43% increase in median sale price from 2021 to 2024. For single-family homes, the 3-year trend shows a 41% increase.



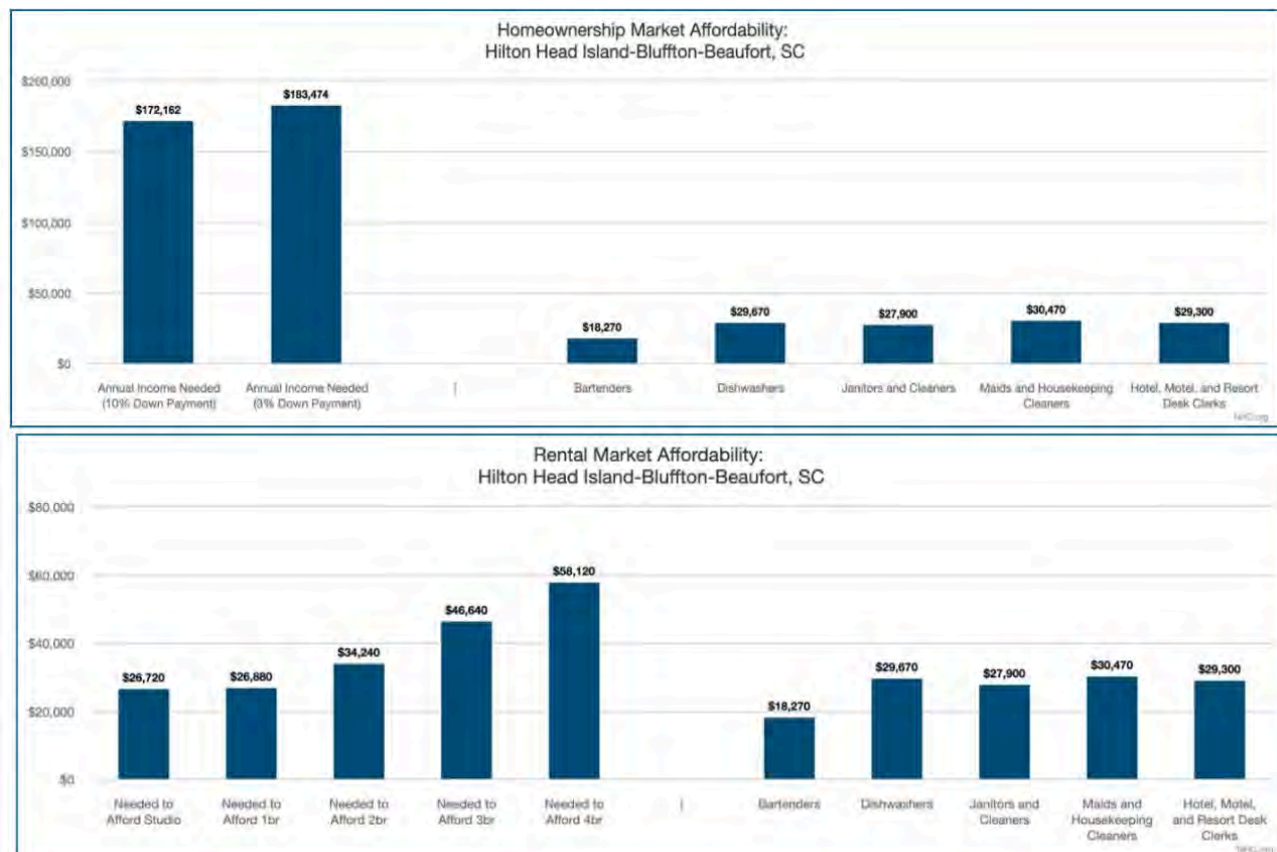
Beaufort County's housing costs is significantly higher compared to many neighboring cities and counties. The overall cost of living in Beaufort County is approximately 3% lower than the National average yet 6% higher than that of Savannah, GA and only 1% lower than that of Charleston, SC – two much-larger neighboring cities (Redfin). Next to Charleston, Beaufort is the most expensive market to buy in this comparison.

Location	Median Price	% Change from 2023 to 2024
Beaufort County	\$522,500	+ 2.6%
Horry County (Myrtle Beach)	\$328,000	+ 2.5%
Greenville County	\$352,495	+ 5.1%
Richland County (Columbia)	\$260,000	- .019%
Chatham County (Savannah)	\$366,000	+ 5.4%
Myrtle Beach	\$285,000	+ 14%
Charlotte MSA	\$402,000	+ 1.8%
Charleston	\$559,500	+ 7.6%

As evidenced in this chapter, there is a clear mismatch between housing that is available in the current market and the area incomes for some of the major workforce sectors. There continues to be few affordable housing options for the area's workforce with availability and affordability trending down. As highlighted in the National Housing Conference's Paycheck to Paycheck March 2024 Data Update for Beaufort County MSA areas, the qualifying income needed to afford a 2 Bedroom apartment at \$856/month in the Hilton Head Island-Bluffton-Beaufort, SC MSA is \$34,240 annually. All occupations shown in the table below do not produce enough annual income for the worker to afford a 2 BR rental or purchase a 2 BR home in the Beaufort County area (NHC's Paycheck to Paycheck Data Update March, 2024, <https://nhc.org/paycheck-to-paycheck/#>) – essentially locking them out of a chance at housing affordability.

Many of these cost-burdened workers fill occupations critical to the greater Beaufort County's tourism and leisure industry including Bartenders, Waiters, Dishwashers, Janitors and Maids, and Hotel and Resort Clerks. Others like Substitute Teachers, Home Health Aides, Childcare Workers, and Laundry and Dry-cleaning Workers serve the resident population all year-long yet cannot afford to live affordably in the community they serve.

The charts below from the Paycheck-to-Paycheck affordability index provide several examples - specifically for the workers in the hospitality and accommodations sectors - on what they can afford based on median incomes for each position as well as what they need to earn to afford a median price home or apartment in the Beaufort area.





Other major employment sector positions are also included below to show the growing mismatch between what area workers earn and what they can afford. Tourism related workers are faced with the largest barriers to finding housing options that are affordable but as one can see from the chart below other major employment sectors are also struggling to find affordable options in the region.

Occupation	Area Median Income	3% down qualify	Afford to buy?	1 BR Rent Qualify	Afford Rent 1 BR?	2 BR Rent Qualify	Afford Rent 2 BR?
Substitute <u>Teachers</u> , Short-Term	\$32,470	\$183,474	No	\$26,880	Yes	\$34,240	No
Teaching <u>Assistants</u> , Except Postsecondary	\$23,980	\$183,474	No	\$26,880	No	\$34,240	No
Home Health and Personal Care Aides	\$29,750	\$183,474	No	\$26,880	Yes	\$34,240	No
Security Guards	\$32,940	\$183,474	No	\$26,880	Yes	\$34,240	No
Bartenders	\$18,270	\$183,474	No	\$26,880	No	\$34,240	No
Fast Food and Counter Workers	\$26,590	\$183,474	No	\$26,880	No	\$34,240	No
Waiters and Waitresses	\$19,950	\$183,474	No	\$26,880	No	\$34,240	No
Dishwashers	\$29,670	\$183,474	No	\$26,880	Yes	\$34,240	No
Janitors and <u>Cleaners</u> , Except Maids and Housekeeping Cleaners	\$27,900	\$183,474	No	\$26,880	Yes	\$34,240	No
Maids and Housekeeping Cleaners	\$30,470	\$183,474	No	\$26,880	Yes	\$34,240	No
Hairdressers, Hairstylists, and Cosmetologists	\$29,460	\$183,474	No	\$26,880	Yes	\$34,240	No
Childcare Workers	\$27,670	\$183,474	No	\$26,880	Yes	\$34,240	No
Cashiers	\$26,980	\$183,474	No	\$26,880	Yes	\$34,240	No
Retail Salespersons	\$29,710	\$183,474	No	\$26,880	Yes	\$34,240	No
Hotel, Motel, and Resort Desk Clerks	\$29,300	\$183,474	No	\$26,880	Yes	\$34,240	No
Receptionists and Information Clerks	\$31,780	\$183,474	No	\$26,880	Yes	\$34,240	No
Laundry and Dry-Cleaning Workers	\$27,650	\$183,474	No	\$26,880	Yes	\$34,240	No
Parking Attendants	\$30,180	\$183,474	No	\$26,880	Yes	\$34,240	No
Stockers and Order Fillers	\$32,890	\$183,474	No	\$26,880	Yes	\$34,240	No

# Construction and Development Costs

## Ownership Market Costs:

A recent article by Today's Homeowner, highlighted that in South Carolina it could cost anywhere from \$150.92/sq.ft. for craftsman-style bungalow to \$603.60/sq.ft. for high-end plantation-style home. This same article highlighted an acre of farmland in South Carolina averages around \$2,830. However, urban lots cost significantly higher at \$500,000 per acre in most cities. These costs will vary depending on where in South Carolina a developer is building; urban vs rural, inland vs coastal etc. Beaufort County includes all these land typologies within the County. Although the submarket town/cities within Beaufort County have smaller populations than places like Charleston and Greenville, the urban cores within the County, like the City of Beaufort and Town of Bluffton, have all seen higher land cost along with construction costs. The County has unincorporated areas adjacent to these towns as well as quite a bit of rural areas that could have more affordable land but may have higher infrastructure costs. One developer interviewed shared it can cost over a \$1M per acre for land in the Island areas (pending location and infrastructure needs) and approximately \$340/sq. ft. for 3 story stick-built building. Another example shared included 2,000 sq.ft. 3-bedroom modular units priced at \$320,000/unit including site work but not land.

The Today's Homeowner article also pointed out the following average per square foot cost based on type of housing:

- **Craftsman Style Beach Cottage: \$150.92- \$188.65/sq.ft.** This type of home is very popular in Beaufort County due to its proximity to the ocean. Most of these types of homes have an average floor area of about 1,850 square feet indicating construction costs anywhere from \$278,500 to \$348,200.
- **Mid-Range Home: \$188.65- \$415.03/sq.ft.** This is for a Lowcountry cottage home typology with wrap around porches and southern design which is a common architectural style for many mid-range homes in the Beaufort area. Most of these types of homes with an average floor area of 1,850 square foot range between \$348,200 to \$766,145.
- **High-End or Luxury Home: \$415.03-\$603.68/sq.ft.** This type of home is typically considered a Plantation-style home usually found in upscale neighborhoods, especially in areas like Beaufort County and their adjacent jurisdictions like Hilton Head Island and Port Royal. Most of these types of homes vary in square footage and tend to be larger homes with high end finishes and amenities so can range anywhere from \$766,145 to \$1,111,400.



Several individual costs that make up these varying construction estimates include framing, exterior work, utilities, interior and finishing costs along with foundational work and labor costs. The costs will vary greatly depending on the type of materials selected and the current pricing for commodities like lumber and concrete. Labor shortages can also play a significant role in the final cost of construction.

	Craftsman-Style	Mid-Range	High-End/ Plantation Style
Charleston	\$175.00	\$262.50	\$700.00
Columbia	\$120.00	\$180.00	\$480.00
Myrtle Beach	\$159.00	\$238.50	\$636.00
Greenville	\$90.00	\$135.00	\$360.00
Hilton Head Island	\$111.08	\$166.62	\$444.32
Sumter	\$118.46	\$177.69	\$473.84
Spartanburg	\$97.00	\$145.50	\$388.00
Florence	\$80.00	\$120.00	\$320.00
Summerville	\$114.65	\$171.98	\$458.60
Beaufort	\$110.00	\$165.00	\$440.00

The chart above provides a good snapshot of estimated construction costs per square foot for various communities in South Carolina compared to the Beaufort area. It should be noted that these are industry-estimates, and each property and home can be significantly different per square foot based on design, location, final finishes and construction financing costs. For the purposes of this Housing Impact Analysis, the chart provides a baseline comparison to consider when evaluating what housing can be considered affordable. As a reminder, a household should spend no more than 30% of their household income or no more than 3 times their annual salary on a home purchase to be considered affordable.



## **Land Cost:**

As mentioned earlier in this same article by Today's Homeowner, land prices vary drastically depending on the location of the property and can be well over \$500,000/acre in some of the coastal areas like Beaufort. In some cases, finding smaller lots can be the best option to keep housing more affordable or increasing density on a piece of land to allow for more units to maximize the value of the land. A smaller piece of land, around a fourth of an acre, may cost around \$125,000, translating to approximately 10,890 square feet, which is more than enough for a single-family home.

## **Other Construction Costs:**

The article also mentioned site preparation can add between 3-8% to a project cost that is not included in typical construction costs and can vary greatly depending on the type of land the home is being built on. For example, in the Beaufort area, many homes must be built above the flood plain or have topology issues due to the proximity to the water or marshland, so they may require environmental mitigation efforts prior to being built or installed on stilts, etc. The cost of site work will also depend on the type of construction, the number of stories, and existing site conditions - creating a range between \$3.34 per square foot to a maximum of \$13.35 square foot.

In addition to building new affordable housing, the County is also interested in the preservation of housing. Both the Bowen Study and the Comprehensive plan included preservation as an important strategy to protect existing affordable housing stock and minimize potential displacement. As mentioned earlier there are few government-subsidized affordable housing units available within the County, which would be protected as affordable for longer- periods of time. Older existing apartments or villas, considered as "naturally occurring affordable housing or NOAH" due to their age, are also limited in the County. One developer shared a list of several properties throughout the county that might be considered relatively affordable or NOAH. These properties were listed between \$220,000-\$360,000 for 2 bedroom 2 bathroom just for acquisition, not taking into consideration repairs or improvements that might be necessary to preserve these units.

Other considerations on total development cost include pre-development and soft costs like professional service fees, architect, engineering, local approvals, permits and tap fees, etc.

## **Other Impediments to development:**

Due to the Beaufort County's location along the coast, other environmental considerations play a huge role in increasing the cost of development, including but not limited to building code requirement to address natural disasters and protections, like seismic and wind zones that require engineered drawings and specified materials that help eliminate risks of home destruction in the event of a hurricane or earthquake.

## Local Permitting and Impact Fees:

Although local permitting and impact fees can significantly increase the cost of housing development, the County has looked at where they can reduce or waive these fees for affordable housing developers. The County currently has an affordable housing impact fee waiver program that is described in more detail in the Removing Barriers Chapter of this analysis. The County is looking at other fee waivers and incentives they can implement to support increased affordable housing production, yet many of these fees are not under their control, like water and sewer tap fees or utility costs etc.

As part of the Bowen Housing Needs Assessment, researchers spoke to several developers about the cost of housing development as a barrier to ensuring more affordable options. The study mentioned that during one-on-one discussions with local affordable housing partners they indicated many obstacles that make it hard to develop more affordable housing in the County. One challenge is the high costs for infrastructure improvements and impact fees, finding the land to build and finding development partners willing to build affordable or mixed income housing, since costs have escalated so much over the past five years. Due to topography, wetland and environmental concerns, there is limited developable land in the County that is cost effective enough to make a significant impact on the demand for affordable housing.

Some recommendations that came from those meetings included partners suggesting the County consider more creative types of housing development (alternative types of housing), look at maximizing density where feasible, and consider mixed income where possible and commercial conversion as an option for under-utilized retail and commercial spaces - including repurposing older and dilapidated buildings that could be refurbished and made into affordable housing. The County has already looked at the conversion of older motels/hotels as an option for affordable housing and has a few projects underway within the County.

## Insurance:

Related to some of the added costs due to environmental considerations, insurance costs are playing a significant role in affordability. In some communities in the Beaufort area insurance costs for both ownership and rental properties have increased over 100%. A recent 2024 article indicated that homeowners across the country are facing an insurance crisis and driving up housing costs, especially in weather vulnerable coastal communities like Beaufort. According to a survey conducted by Redfin Corp. about 72% of U.S. homeowners said their policy had increased over the past year, about 8% of those surveyed said their insurance company stopped offering coverage for their homes all together. Redfin expects homeowner insurance rates will continue to rise in communities like South Carolina, Florida and California that are more prone to natural and environmental disasters. Insurance marketplace Insurify Inc. projected homeowners' insurance would rise about 6% in 2024 after roughly 20% annual rate increases between 2021 and 2023, that would bring the average rate to \$2,522 annually by the end of the year.



# Removing Barriers to Workforce Housing

## Incentivizing Affordable Workforce Housing:

A key aspect of this Housing Impact Analysis is to understand both the local barriers to the preservation and production of affordable workforce housing along with the strategies and incentives the County may already offer to support housing solutions. The Bowen Study outlined several housing strategies including planning policies and funding ideas for the County to consider that could incentivize private developers to create more affordable housing within their projects. Based on these recommendations and recognizing the growing demand for workforce housing over the last few years, the County has already implemented several developer incentive programs to support an increase in affordable housing.

Beaufort County Development Code includes an entire chapter on encouraging affordable housing as a key element of the County's growth and development priorities. In Chapter 4 of the Development Code, County Council indicated that affordable housing is the essential foundation upon which to build a more sustainable future for Beaufort County and to grow a more competitive workforce to meet the challenges of our regional, state, and global economy.

County Council found that zoning regulations can be an effective tool for implementing the strategies to address the needs for affordable housing stock within Beaufort County. Within the Developer Incentives Chapter, the County identified certain incentives and zoning tools that can help facilitate and encourage the development of affordable housing types. Specifically, this chapter was intended to promote a diversity of housing stock by providing certain incentives and regulatory standards for the creation of affordable housing units in the C5 zoning district. The following highlights specific excerpts from the Development Code that Beaufort County has already committed to support the increased production of affordable workforce housing.





## Developer Incentives:

### Chapter 4 of the Beaufort County Code

Within this chapter the County outlines what is required for a developer to access density bonuses and impact fee exemptions for projects that commit to including affordable housing within a larger development project.

The number of owner-occupied affordable housing units and/or rental affordable housing units per development shall be one of the following at the election of the applicant:

- Thirty (30%) percent of the dwelling units, rounded up to the whole number, shall be restricted by deed as owner occupied affordable housing units and/or rental affordable housing units for a period of at least twenty (20) years; or
- Twenty (20%) percent of the dwelling units, rounded up to the whole number, shall be restricted by deed as owner occupied affordable housing units and/or rental affordable housing units for a period of at least twenty-five (25) years.

**Density bonus.** Housing developments or re-developments located within the Regional Center Mixed Use (CS) zone district may elect to development land in compliance with this chapter. As an incentive for development under this chapter, there shall be no maximum density or minimum lot size requirements.

**Impact fees.** Impact fees shall be reduced in proportion to the number of affordable housing units being provided in accordance with Beaufort County Code of Ordinances Section 82-32. A project approved under this chapter shall be determined to be a project that creates affordable housing for the purpose of exempting impact fees in proportion to the number of affordable housing units created. The following table indicates the percentage of discount available for Impact Fees for Affordable Housing:

Area Median Income (AMI)	Impact Fee Discount
Under 60%	100%
60% to 80%	60%
Over 80%	0%

The County commits a certain amount of funding annually into their Beaufort County Affordable Fund to support this incentive for affordable workforce housing projects based on project eligibility and available funding. Development impact fees may be subsidized, as long as funds are available in the Beaufort County Affordable Housing Fund, by up to 100 percent for housing a person or family earning 80 percent or less of the county's median family income. Criteria approved by county council will be used to provide guidance and should be reviewed prior to requesting assistance from the County.

## Financing/Funding:

In addition to implementing several planning policies that can encourage developers to produce affordable workforce housing, the County has also committed funding to support financing solutions for development projects. One noteworthy strategy included leading the housing trust fund study that launched a regional housing trust fund. The County worked closely with other local jurisdictions and Jasper County to implement the Beaufort Jasper Housing Trust Fund (BJHT), which was officially incorporated in 2023. Participating jurisdictions signed an intergovernmental agreement, agreeing to the creation of the fund and a 10-year funding commitment, with the County being the largest contributor to the Fund initially.

### Beaufort Jasper Housing Trust Fund

The housing trust fund mission is to assist in the financing and funding of affordable housing. The housing trust fund was supported originally with a one-time allocation from the American Rescue Funds from each participating jurisdiction. Subsequent annual funding will need to be determined by each government partner from a local source that their Councils identify.

The above incentives and financing tools are a just a few of the initiatives that the County has already implemented to support the preservation and production of affordable workforce housing efforts. The County is constantly seeking ways to support affordable housing, including looking at policy or regulatory tools that could encourage more affordable and mixed income housing. With the passage of Act 57, the County now has the opportunity to utilize a new funding source for workforce housing projects within the County. These funds will help compliment the County's existing programs to increase the production and preservation of workforce housing.



Image from Garden Oaks Apartments

In addition to the efforts mentioned above, the County is also investigating the following policy and strategies to support the growing need for more affordable housing.

### **Preserve Existing Affordable Housing**

- Work with municipalities to develop conservation overlay zones or similar, to protect areas of naturally occurring affordable housing; an example would be the Oaklawn subdivision on Oaklawn Ave in the City of Beaufort.
- Prohibit new Short Term Rentals in single-family zoned neighborhoods unless the owner lives on the premises (i.e., prohibit new STRs on 6% property).
- Identify all LIHTC projects in the County; determine when the affordability period ends; develop options for extending affordability period or otherwise maintaining affordability.
- Consider establishing and/or funding local housing repair programs targeted at low-moderate income homeowners or income-restricted rental properties.

### **Promote New Affordable Housing**

- Revise development codes in the County and municipalities to promote more missing middle housing by allowing 2 accessory dwelling units (ADUs) per lot and allowing 2- and 3-family dwellings in current single-family zones. Consider allowing 4-family dwellings and townhouses.
  - eliminate on-site parking requirements for ADUs
- Waive or reduce building permitting fees for ADUs where owner signs an affidavit that covenants do not preclude it being rented.
  - consider waiving or reducing building permit fees for other Missing Middle housing types indefinitely or for a limited period of time to stimulate interest in development
- Work with SC Building Codes Council to allow 3- and 4-unit structures to be built with alternatives to sprinklers.
- Work with municipalities to develop pre-reviewed plans for Missing Middle Housing, starting with ADUs.
- Advocate legislature for authority to adopt inclusionary housing ordinances.
- Advocate legislature for authority to adopt real estate transfer fee that could be used for affordable housing and open space preservation.
- Adjust all impact fees to be based on the true impact of the use; fees should be based on square footage of the unit and/or the number of bedrooms.
- Facilitate a developers training workshop similar to what is done by The Incremental Development Alliance, to educate contractors and developers on developing Missing Middle Housing.



## Conclusion

The Bowen report emphasized the need for the County to support a balanced housing approach to meet the growing demand for diverse housing options with an emphasis on affordable workforce housing. As highlighted in this Analysis, while current housing shortages are more pronounced among lower-income households, the projected household growth among higher income households is significant. There is a need to provide housing to meet this population growth as well to avoid a “bottleneck effect”. When there is not sufficient housing stock in the market to meet diverse income growth, residents have few options to move into housing that meets their income, therefore they tend to stay in existing homes or rental units longer instead of upgrading to newer housing. When residents upgrade or move into a newer housing option, more affordable options are freed up for low to moderate income households to access. Additionally, when the housing market does not keep up with demand caused by population growth and limited housing stock, supply and demand market forces increase the overall cost of housing, making it difficult for low- and moderate-income families to find affordable housing.

The Bowen report also indicated projected growth to be robust among both renter- and owner-occupied households and among both younger and older adults, providing further evidence that future housing development will need to be diverse to meet the varied needs of each of these household segments. With the ongoing population growth as indicated in this analysis and the lack of available housing inventory, especially affordable options, the County is seeking diverse solutions to address the need for more affordable housing, with a focus on the growing workforce needs. The housing shortage is directly impacting the County’s ability to attract and retain employers and employees in some of the key business sectors mentioned in this Analysis, in particular within tourism related jobs. The County has already implemented several policies and programs to support the preservation and production of a broad spectrum of affordability levels and product types including some mentioned within this analysis.

With tourism continuing to be one of the top three employment sectors in the County, there is a clear nexus between the need for workforce housing solutions and the revenues generated by the tourism economy. The availability of ATAX to support workforce housing provides the County with a new revenue source to help with the development and implementation of additional solutions to meet the growing need for more affordable housing options.

The passage of Act 57 offers the County a new opportunity to increase financial resources available to support programs for affordable workforce housing opportunities. The County estimates a total State ATAX amount for FY2025 of about \$1,500,000. With the new law, the County could now use up to 15% of this tax revenue to support workforce housing efforts in addition to 15% of their local ATAX revenues, which could be a significant new resource to support affordable housing efforts in the County.



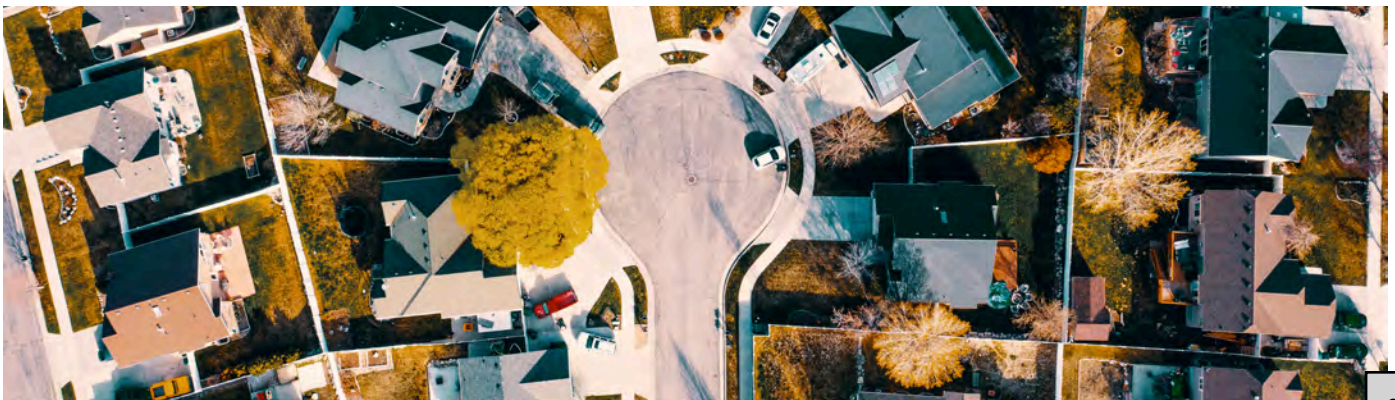
As outlined in Beaufort County's adopted 2040 Comprehensive Plan, the County is committed to a diverse community that balances growth, attracts business and employment opportunities, preserves the area's fragile environment, ensures affordable housing options, and maintains quality of life for all residents regardless of income. The County is also committed to investing in new public infrastructure, creating incentives for affordable housing, and focusing development on land of the highest suitability. Within the Housing Element of the 2040 Comprehensive Plan, the County's overarching goal is to promote quality, affordable housing available and accessible to all residents, while ensuring a mix of housing types available to residents of varying incomes, ages and abilities.

To address this growing workforce and housing mismatch as highlighted throughout this Housing Impact Analysis, Beaufort County will need to continue to play an active role in promoting affordable housing solutions. Efforts will need to include but are not limited to implementing additional planning and zoning policy incentives, enhance public/private partnerships with affordable housing developers and identify new and flexible funding sources that enable these projects to come to fruition.

The County through its comprehensive plan, has already committed to:

- Foster the creation of affordable housing near jobs, services and public transit.
- Reduce regulatory barriers to the creation of affordable housing.
- Establish an ongoing funding source to address housing needs.
- Partner with non-profit agencies and the private sector.
- Work regionally to address affordable housing needs.

To further support these commitments, the County is seeking the opportunity to increase funding sources for affordable workforce housing efforts through the adoption of this Housing Impact Analysis as an amendment to their 2040 Comprehensive Plan, enabling access to up to 15% of its Accommodation Tax (ATAX) revenue. Access to this new eligible source of funding can help stretch existing sources and leverage additional funding to support new housing programs and complement existing policy efforts.



# Sources

- 2018 Bowen Beaufort County Housing Needs Assessment
- 2023 South Carolina Palmetto Housing Study
- 2040 Beaufort County Comprehensive Plan
- 2024 Lowcountry Council of Government, Community Indicators Report
- Beaufort Jasper Counties REALTORS Association
- Biz Journals
- Capital Improvement Plan and Development Impact Fee Study, Tischler Bise Study, 2020
- Hilton Head Island Area Realtors Association
- Island's of Beaufort
- Livewell Terrace Market Study, 2023 T Ronald Brown Research & Analysis
- March 2024 SC State Paper
- May 2023 Bureau of Labor Statistics
- May 2024 Construction Costs
- National Housing Conference
- Redfin 1
- Redfin 2
- South Carolina State Housing Finance
- Today's Homeowner
- US Census Reporter ACS 2022 1-Year estimates
- World Population Review





# Appendix

**South Carolina General Assembly**  
125th Session, 2023-2024

**A57, R66, S284**

**STATUS INFORMATION**

General Bill

Sponsors: Senators Davis, Turner, Jackson, Scott, Kimpson, Senn, Campsen and Sabb

Companion/Similar bill(s): 4213

Document Path: SR-0145KM23.docx

Introduced in the Senate on January 10, 2023

Introduced in the House on April 4, 2023

Last Amended on May 10, 2023

Currently residing in the Senate

Summary: Development of Workforce Housing

**HISTORY OF LEGISLATIVE ACTIONS**

Date	Body	Action Description with journal page number
12/7/2022	Senate	Prefiled
12/7/2022	Senate	Referred to Committee on <b>Finance</b>
1/10/2023	Senate	Introduced and read first time (Senate Journal-page 178)
1/10/2023	Senate	Referred to Committee on <b>Finance</b> (Senate Journal-page 178)
3/22/2023		Scrivener's error corrected
3/22/2023	Senate	Committee report: Favorable <b>Finance</b>
3/24/2023		Scrivener's error corrected
3/28/2023	Senate	Read second time (Senate Journal-page 75)
3/30/2023	Senate	Amended (Senate Journal-page 13)
3/30/2023	Senate	Read third time and sent to House (Senate Journal-page 13)
3/30/2023	Senate	Roll call Ayes-34 Nays-6 (Senate Journal-page 13)
4/4/2023	House	Introduced and read first time (House Journal-page 9)
4/4/2023	House	Referred to Committee on <b>Ways and Means</b> (House Journal-page 9)
5/4/2023	House	Committee report: Favorable with amendment <b>Ways and Means</b> (House Journal-page 8)
5/9/2023	House	Debate adjourned (House Journal-page 27)
5/10/2023	House	Amended (House Journal-page 85)
5/10/2023	House	Read second time (House Journal-page 85)
5/10/2023	House	Roll call Yeas-80 Nays-29 (House Journal-page 88)
5/11/2023	House	Read third time and returned to Senate with amendments (House Journal-page 17)
5/11/2023	Senate	Concurred in House amendment and enrolled (Senate Journal-page 57)
5/11/2023	Senate	Roll call Ayes-41 Nays-2 (Senate Journal-page 57)
5/17/2023		Ratified R 66
5/19/2023		Signed By Governor
5/26/2023		Effective date 05/19/23
5/26/2023		Act No. 57

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## **VERSIONS OF THIS BILL**

[12/07/2022](#)

[03/22/2023](#)

[03/22/2023-A](#)

[03/24/2023](#)

[03/30/2023](#)

[05/05/2023](#)

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5/26/2023 Act No. 57

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[03/24/2023](#)

[03/30/2023](#)

[05/05/2023](#)

[05/10/2023](#)

(A57, R66, S284)

**AN ACT TO AMEND THE SOUTH CAROLINA CODE OF LAWS BY AMENDING SECTION 6-1-530, RELATING TO USE OF REVENUE FROM LOCAL ACCOMMODATIONS TAX, SO AS TO PROVIDE THAT THE DEVELOPMENT OF WORKFORCE HOUSING IS ONE OF THE PURPOSES FOR WHICH LOCAL ACCOMMODATIONS TAXES MAY BE USED; BY AMENDING SECTION 6-4-10, RELATING TO THE USE OF CERTAIN REVENUE FROM THE ACCOMMODATIONS TAX, SO AS TO PROVIDE THAT THE DEVELOPMENT OF WORKFORCE HOUSING IS ONE OF THE PURPOSES FOR WHICH THE FUNDS MAY BE USED; BY AMENDING SECTION 6-4-15, RELATING TO THE USE OF REVENUES TO FINANCE BONDS, SO AS TO PROVIDE THAT THE DEVELOPMENT OF WORKFORCE HOUSING IS ONE OF THE PURPOSES FOR WHICH BONDS MAY BE ISSUED; BY ADDING SECTION 6-4-12 SO AS TO REQUIRE A LOCAL GOVERNMENT TO PREPARE A HOUSING IMPACT ANALYSIS BEFORE USING SUCH FUNDS FOR WORKFORCE HOUSING; BY AMENDING SECTIONS 6-4-5 AND 6-1-510, RELATING TO DEFINITIONS, SO AS TO ADD CERTAIN DEFINITIONS; BY AMENDING SECTION 6-29-510, RELATING TO LOCAL PLANNING, SO AS TO REQUIRE THE PLANNING COMMISSION MUST SOLICIT INPUT FOR THE ANALYSIS FROM HOMEBUILDERS AND OTHER EXPERTS WHEN DEVELOPING A HOUSING ELEMENT FOR THE LOCAL COMPREHENSIVE PLAN; TO CREATE THE LAND DEVELOPMENT STUDY COMMITTEE TO EXAMINE CURRENT AND PROSPECTIVE METHODS TO PLAN FOR AND MANAGE LAND DEVELOPMENT; AND TO REQUIRE A REPORT DETAILING THE EFFECTS OF THIS ACT ON TOURISM AND WORKFORCE HOUSING.**

Be it enacted by the General Assembly of the State of South Carolina:

**Local accommodations tax for workforce housing**

SECTION 1. Section 6-1-530(A) of the S.C. Code is amended to read:

(A) The revenue generated by the local accommodations tax must be

used exclusively for the following purposes:

(1) tourism-related buildings including, but not limited to, civic centers, coliseums, and aquariums;

(2) tourism-related cultural, recreational, or historic facilities;

(3) beach access, renourishment, or other tourism-related lands and water access;

(4) highways, roads, streets, and bridges providing access to tourist destinations;

(5) advertisements and promotions related to tourism development;

(6) water and sewer infrastructure to serve tourism-related demand;

or

(7) development of workforce housing, which must include programs to promote home ownership. However, a county or municipality may not expend or dedicate more than fifteen percent of its annual local accommodations tax revenue for the purposes set forth in this item. The provisions of this item are no longer effective after December 31, 2030.

### **State accommodations tax for workforce housing**

SECTION 2. Section 6-4-10(4) of the S.C. Code is amended to read:

(4)(a) The remaining balance plus earned interest received by a municipality or county must be allocated to a special fund and used for tourism-related expenditures. This section does not prohibit a municipality or county from using accommodations tax general fund revenues for tourism-related expenditures.

(b) The funds received by a county or municipality which has a high concentration of tourism activity may be used to provide additional



county and municipal services including, but not limited to, law enforcement, traffic control, public facilities, and highway and street maintenance, as well as the continual promotion of tourism. The funds must not be used as an additional source of revenue to provide services normally provided by the county or municipality but to promote tourism and enlarge its economic benefits through advertising, promotion, and providing those facilities and services which enhance the ability of the county or municipality to attract and provide for tourists.

“Tourism-related expenditures” include:

(i) advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity;

(ii) promotion of the arts and cultural events;

(iii) construction, maintenance, and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities;

(iv) the criminal justice system, law enforcement, fire protection, solid waste collection, and health facilities when required to serve tourists and tourist facilities. This is based on the estimated percentage of costs directly attributed to tourists;

(v) public facilities such as restrooms, dressing rooms, parks, and parking lots;

(vi) tourist shuttle transportation;

(vii) control and repair of waterfront erosion, including beach renourishment;

(viii) operating visitor information centers;

(ix) development of workforce housing, which must include programs to promote home ownership. However, a county or municipality may not expend or dedicate more than fifteen percent of its annual local accommodations tax revenue for the purposes set forth in

this item (4)(b)(ix). The provisions of this item (4)(b)(ix) are no longer effective after December 31, 2030.

(c)(i) Allocations to the special fund must be spent by the municipality or county within two years of receipt. However, the time limit may be extended upon the recommendation of the local governing body of the county or municipality and approval of the oversight committee established pursuant to Section 6-4-35. An extension must include provisions that funds be committed for a specific project or program.

(ii) Notwithstanding the provisions of subsubitem (i), upon a two-thirds affirmative vote of the membership of the appropriate local governing body, a county or municipality may carry forward unexpended allocations to the special fund beyond two years provided that the county or municipality commits use of the funds exclusively to the control and repair of waterfront erosion, including beach renourishment or development of workforce housing, which must include programs to promote home ownership. The county or municipality annually shall notify the oversight committee, established pursuant to Section 6-4-35, of the basic activity of the committed funds, including beginning balance, deposits, expenditures, and ending balance.

(d) In the expenditure of these funds, counties and municipalities are required to promote tourism and make tourism-related expenditures primarily in the geographical areas of the county or municipality in which the proceeds of the tax are collected where it is practical.

### **Bonds for workforce housing**

SECTION 3. Section 6-4-15 of the S.C. Code is amended to read:

Section 6-4-15. A municipality or county may issue bonds, enter into other financial obligations, or create reserves to secure obligations to finance all or a portion of the cost of constructing facilities, all of which must fulfill the purpose of this chapter, for civic activities, the arts, cultural events, or workforce housing that includes programs to promote home ownership. The annual debt service of indebtedness incurred to finance the facilities or lease payments for the use of the facilities may be provided from the funds received by a municipality or county from the accommodations tax in an amount not to exceed the amount received by the municipality or county after deduction of the accommodations tax funds dedicated to the general fund and the advertising and promotion fund. However, none of the revenue received by a municipality or county from the accommodations tax may be used to retire outstanding bonded indebtedness unless accommodations tax revenue was obligated for that purpose when the debt was incurred.

### **Housing impact analysis**

SECTION 4. Chapter 4, Title 6 of the S.C. Code is amended by adding:

Section 6-4-12. (A) If a local government intends to use the funds for the development of workforce housing, then the local government shall prepare a housing impact analysis prior to giving second reading to the ordinance.

(B) The analysis required by subsection (A) must include:

(1) information about the effect of the ordinance on housing, including the effect of the ordinance on each of the following:

(a) the cost of developing, construction, rehabilitating, improving, maintaining, or owning single-family or multifamily

dwellings;

(b) the purchase price of new homes or the fair market value of existing homes;

(c) the cost and availability of financing to purchase or develop housing;

(d) housing costs; and

(e) the density, location, setback, size, or height development on a lot, parcel, land division, or subdivision; and

(2) an analysis of the relative impact of the ordinance on low- and moderate-income households.

(C) The following applies to information on housing costs required to be included in the analysis conducted pursuant to subsection (B)(1)(d):

(1) the analysis must include reasonable estimates of the effect of the ordinance on housing costs, expressed in dollar amounts. The local government shall include a brief summary of, or worksheet demonstrating, the computations used in determining the dollar amounts. However, if the local government determines that it is not possible to make an estimate expressed in dollar amounts, then the analysis must include a statement setting forth the reasons for the local government's determination; and

(2) the analysis must include descriptions of both the immediate effect and, to the extent ascertainable, the long-term effect of the ordinance on housing costs.

(D) Except as otherwise provided in this section, a housing impact analysis required pursuant to this section must be based on costs associated with the development, construction, financing, purchasing, sale, ownership, or availability of a median-priced single-family residence. However, the analysis may include estimates for larger developments as part of an analysis of the long-term effects of the

ordinance.

(E) A local government may request information from any state agencies, local units of government, universities or colleges, organizations, or individuals as necessary to prepare a housing impact analysis pursuant to this section.

(F) The local government shall provide the housing impact analysis for an ordinance to the members of the legislative body of the local government, the Department of Revenue, and the Tourism Expenditure Revenue Committee before the ordinance is considered by the legislative body. The Department of Revenue may not disburse any accommodations taxes to the local government for purposes of development of workforce housing unless and until the local government has provided the housing impact analysis to the parties required pursuant to this subsection.

## **Definitions**

SECTION 5. Section 6-4-5 of the S.C. Code is amended to read:

Section 6-4-5. As used in this chapter:

(1) “County area” means a county and municipalities within the geographical boundaries of the county.

(2) “Cultural”, as it applies to members of advisory committees in Section 6-4-25, means persons actively involved and familiar with the cultural community of the area including, but not limited to, the arts, historical preservation, museums, and festivals.

(3) “Hospitality”, as it applies to members of the committees in item (2), means persons directly involved in the service segment of the travel and tourism industry including, but not limited to, businesses that

primarily serve visitors such as lodging facilities, restaurants, attractions, recreational amenities, transportation facilities and services, and travel information and promotion entities.

(4) “Travel” and “tourism” mean the action and activities of people taking trips outside their home communities for any purpose, except daily commuting to and from work.

(5) “Housing costs” for housing occupied by the owner means:

(a) the principal and interest on a mortgage loan that finances the purchase of the housing;

(b) the closing costs and other costs associated with a mortgage loan;

(c) mortgage insurance;

(d) property insurance;

(e) utility-related costs;

(f) property taxes; and

(g) if the housing is owned and occupied by members of a cooperative or an unincorporated cooperative association, fees paid to a person for managing the housing.

(6) “Housing costs” for rented housing means:

(a) rent; and

(b) utility-related costs, if not included in the rent.

(7) “Ordinance” means an ordinance adopted pursuant to Section 6-29-530.

(8) “Utility-related costs” means costs related to power, heat, gas, light, water, and sewage.

(9) “Workforce housing” means residential housing for rent or sale that is appropriately priced for rent or sale to a person or family whose income falls within thirty percent and one hundred twenty percent of the median income for the local area, with adjustments for household size,



according to the latest figures available from the United States Department of Housing and Urban Development (HUD).

### **Definition**

SECTION 6. Section 6-1-510 of the S.C. Code is amended by adding:

(4) “Workforce housing” means residential housing for rent or sale that is reasonably and appropriately priced for rent or sale to a person or family whose income falls within thirty percent and one hundred twenty percent of the median income for the local area, with adjustments for household size, according to the latest figures available from the United States Department of Housing and Urban Development (HUD).

### **Local comprehensive plan**

SECTION 7. Section 6-29-510(D)(6) of the S.C. Code is amended to read:

(6) a housing element which considers location, types, age, and condition of housing, owner and renter occupancy, and affordability of housing. This element includes an analysis to ascertain nonessential housing regulatory requirements, as defined in this chapter, that add to the cost of developing affordable housing but are not necessary to protect the public health, safety, or welfare and an analysis of market-based incentives that may be made available to encourage development of affordable housing, which incentives may include density bonuses, design flexibility, and streamlined permitting processes. The planning commission must solicit input for this analysis from homebuilders,

developers, contractors, and housing finance experts when developing this element;

### **Land Development Study Committee**

SECTION 8. (A) There is created the Land Development Study Committee to examine current and prospective methods to plan for and manage land development in South Carolina.

(B) The study committee must be comprised of three members of the Senate appointed by the President of the Senate and three members of the House of Representatives appointed by the Speaker of the House. Staff from the Senate and House of Representatives shall assist the study committee.

(C) The members of the study committee shall seek assistance from governmental agencies including the South Carolina Building Codes Council, the South Carolina Housing Authority, and the South Carolina Department of Agriculture, and from members of the private sector including, but not limited to, the Homebuilders Association of South Carolina, Habitat for Humanity South Carolina, the Realtors Association of South Carolina, the Municipal Association of South Carolina, the South Carolina Association of Counties, South Carolina Land Trust, Conservation Voters of South Carolina, the South Carolina Chapter of the American Planning Association, and the Manufactured Housing Institute of South Carolina.

(D) The study committee shall provide a report to the General Assembly by December 31, 2023, at which time the study committee shall dissolve.

### **Report**

SECTION 9. Before the beginning of the 2030 Legislative Session, the Director of the Department of Parks, Recreation and Tourism, in consultation with the Secretary of Commerce and the Commissioner of Agriculture, shall issue a report to the General Assembly detailing the effects on tourism and workforce housing resulting from the codified provisions of this act.

**Time effective**

SECTION 10. This act takes effect upon approval by the Governor.

Ratified the 17<sup>th</sup> day of May, 2023.

Approved the 19<sup>th</sup> day of May, 2023.

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## BEAUFORT COUNTY COUNCIL AGENDA ITEM SUMMARY

Item 13.

<b>ITEM TITLE:</b>
AN ORDINANCE AMENDING BEAUFORT COUNTY CODE OF ORDINANCES PART 1 GENERAL ORDINANCES, CHAPTER 46 HEALTH AND SANITATION, ARTICLE IV ALCOHOL AND DRUG ABUSE BOARD SECTIONS 121 PURPOSE AND 122 POWERS AND DUTIES; AND REPEALING SECTION 46-122 MEMBERSHIP
<b>MEETING NAME AND DATE:</b>
Community Services and Land Use Committee September 9, 2024
<b>PRESENTER INFORMATION:</b>
Audra Antonacci – Ogden, ACA 5 minutes
<b>ITEM BACKGROUND:</b>
In 1973, the South Carolina General Assembly passed Act 301 requiring each county to designate a single county authority on alcohol and drug abuse to be governed by an individual policy making board. The Act further provides that each county authority to develop a county plan for programming in order to receive the mini-bottle tax revenue authorized by the South Carolina Legislative in 1972 in Act 1063, commonly referred to as the mini-bottle bill, which provided for the distribution of one-fourth of the state's mini-bottle tax revenue to continue on a peer-capital basis to be used for alcohol and drug abuse programming.
<b>PROJECT / ITEM NARRATIVE:</b>
Amend Beaufort County Code of Ordinances Chapter 46 Health and Sanitation, Article VI Alcohol and Drug Abuse Board
<b>FISCAL IMPACT:</b>
<i>There would be no direct fiscal impact on the County.</i>
<b>STAFF RECOMMENDATIONS TO COUNCIL:</b>
Staff recommends approval of the Ordinance amending the Beaufort County Code of Ordinances Chapter 46 Health and Sanitation IV Alcohol and Drug Abuse Board.
<b>OPTIONS FOR COUNCIL MOTION:</b>
<i>Motion to approve/deny an Ordinance amending Beaufort County Code of Ordinances Chapter 46 Health and Sanitation IV Alcohol and Drug Abuse Board.</i> <i>Next Step move forward to County Council on September 23<sup>rd</sup>, 2024.</i>

**ORDINANCE 2024/****AN ORDINANCE AMENDING BEAUFORT COUNTY CODE OF ORDINANCES PART 1 GENERAL ORDINANCES, CHAPTER 46 HEALTH AND SANITATION, ARTICLE IV ALCOHOL AND DRUG ABUSE BOARD SECTIONS 121 PURPOSE AND 122 POWERS AND DUTIES; AND REPEALING SECTION 46-122 MEMBERSHIP**

**WHEREAS**, in 1973, the South Carolina General Assembly passed Act 301 requiring each county to designate a single county authority on alcohol and drug abuse to be governed by an individual policy making board; and

**WHEREAS**, Act 301 also required each county authority to develop a county plan for programming in order to receive the mini-bottle tax revenue authorized by the South Carolina Legislature in 1972 in Act 1063, commonly referred to as the mini-bottle bill, which provided for the distribution of one-fourth of the state's mini-bottle tax revenue to counties on a per-capita basis to be used for alcohol and other drug abuse programming; and;

**WHEREAS**, in 1982, Beaufort County Council created the Alcohol and Drug Abuse Board in Article IV of the Beaufort County Code of Ordinances pursuant to Act 301 of 1973; and

**WHEREAS**, Beaufort County Council created the Alcohol and Drug Abuse Board for the purpose of advising County Council in matters concerning the provisions of ongoing programs in prevention, intervention, treatment and aftercare for alcohol and drug abuse problems; and

**WHEREAS**, over time the Alcohol and Drug Abuse Department Director has assumed and performed the duties and responsibility in providing ongoing programs in prevention, intervention, treatment, and aftercare services for citizens of Beaufort County related to substance use and misuse; and

**WHEREAS**, the Alcohol and Drug Abuse Department Director has assumed the responsibility as the sole department in Beaufort County authorized to receive funds for such purposes and will advise County Council and the County Administrator in matters concerning the provisions of the ongoing programs within the department; and

**WHEREAS**, Beaufort County Council now desires to dissolve the Alcohol and Drug Abuse Board and have all duties and responsibilities performed by the Alcohol and Drug Abuse Department.

**NOW, THEREFORE, BE IT ORDAINED BY BEAUFORT COUNTY COUNCIL THAT:**

Article IV Alcohol and Drug Abuse Board, Section 46-121 through Section 46-123 which appears in Beaufort County Code of Ordinances is hereby amended to reflect the language as depicted in exhibit A, Section 46-122 is hereby repealed, and the Alcohol and Drug Abuse Board is hereby dissolved with their duties and responsibilities being assumed by the Alcohol and Drug Abuse Department.

Adopted this \_\_\_\_\_ day of \_\_\_\_\_ 2024.

COUNTY COUNCIL OF BEAUFORT COUNTY

By: \_\_\_\_\_  
Joseph Passiment, Chairman

ATTEST:

\_\_\_\_\_  
Sarah w. Brock, JD, Clerk to Council



PART I - GENERAL ORDINANCES  
Chapter 46 - HEALTH AND SANITATION  
ARTICLE IV. ALCOHOL AND DRUG ABUSE DEPARTMENT

## **ARTICLE IV. ALCOHOL AND DRUG ABUSE<sup>1</sup> DEPARTMENT**

### **Sec. 46-121. Purpose.**

The alcohol and drug abuse department, with all of the powers, duties, responsibilities and functions of any other county department, shall provide ongoing prevention, intervention, treatment, and aftercare services for citizens of Beaufort County, related to substance use and misuse. The Director of the department, along with all the department employees, shall be county employees. The county alcohol and drug abuse department is the sole entity authorized to receive funds for such purpose.

(Code 1982, § 6-26)

### **Sec. 46-122. Powers and duties.**

The alcohol and drug abuse director shall have the following powers and duties:

- (1) Develop and submit a comprehensive county alcohol and drug abuse plan to the County Administration and the South Carolina Department of Alcohol and Other Drug Abuse Services for approval, which is:
  - a. In accordance with South Carolina Act 301 of 1973; and
  - b. Consistent with the state plan on alcohol and drug abuse as required by Public Laws 91-616 as amended and 92-225 as amended.
- (2) Prepare and submit the annual alcohol and drug abuse department budget.
- (3)
- 3) Seek financial support from corporate sources, foundations, state and federal funding opportunities to implement the programs and services outlined in the comprehensive county alcohol and drug abuse plan.
- (4) Collaborate with the South Carolina Department of Alcohol and Other Drug Abuse Services in the implementation of the state plan on alcohol and drug abuse.
- (5) Develop and implement a fee schedule for services rendered comparable with reimbursement rates from third-party payer sources. This includes opportunities for financial assistance for those who meet low-income guidelines based on the Federal Poverty level.
- (6) Ensure the department coordinates prevention, intervention, treatment, and aftercare services with outside agencies.
- ( )
- (7) Ensure services provided by the alcohol and drug abuse department align with the comprehensive county alcohol and drug abuse plan.
- ( )

<sup>1</sup>Cross reference(s)—Boards and commissions, § 2-191 et seq.

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(Code 1982, § 6-28)

**Secs. 46-123—46-150. Reserved.**



## BEAUFORT COUNTY COUNCIL AGENDA ITEM SUMMARY

Item 14.

<b>ITEM TITLE:</b>
<b>AN ORDINANCE AUTHORIZING THE COUNTY ADMINISTRATOR TO ENTER INTO A LEASE AGREEMENT WITH LOWCOUNTRY REGIONAL TRANSPORTATION AUTHORITY FOR THE COUNTY OWNED REAL PROPERTY LOCATED AT 316 CASTLE ROCK ROAD</b>
<b>MEETING NAME AND DATE:</b>
Public Facilities and Safety Committee; August 19, 2024
<b>PRESENTER INFORMATION:</b>
Jared Fralix, Assistant County Administrator – Infrastructure 5 Minutes
<b>ITEM BACKGROUND:</b>
Lowcountry Area Transportation Authority, also known as Palmetto Breeze, is our transit partner for the region providing mass transit opportunities for residents of Beaufort County. We support Palmetto Breeze with funding from our annual budget to assist in the operational cost of providing the service to unincorporated Beaufort County residents.
<b>PROJECT / ITEM NARRATIVE:</b>
Lowcountry Area Transportation Authority, also known as Palmetto Breeze, needs space in Northern Beaufort County for parking buses. Currently, approximately 15 of the 40 buses within their fleet are parked in the driveways of the driver's residence because they do not have a storage lot for their fleet. A centralized storage lot would reduce operational cost and increase security of their buses. Beaufort County owns a 1.0 acre lot at the intersection of Grober Hill Rd and Castle Rock Rd that was formerly used as a convenience center. The property is currently vacant and is identified as surplus property. Rather than sell the property, staff proposes to enter into a lease agreement with our transit partner, Palmetto Breeze, for use of the parcel as a bus storage facility.
<b>FISCAL IMPACT:</b>
Income from lease in accordance with the Beaufort County Lease Policy. The applicable section of the lease policy reads:  <i>The administrator may in its discretion reduce the lease rate to a nominal amount if determined the use of the Property is a benefit to the community that would not otherwise be available with an increased lease rate. The reduced lease rate described in this Section must be presented to County Council and receive a majority vote approval.</i>
<b>STAFF RECOMMENDATIONS TO COUNCIL:</b>
Approve a lease with LRTA at nominal rate for use of the property as a bus storage facility
<b>OPTIONS FOR COUNCIL MOTION:</b>
Motion to disapprove.  Move forward to Council on August 26, 2024; public hearing is required.

**ORDINANCE 2024/\_\_\_\_\_**

**AN ORDINANCE AUTHORIZING THE COUNTY ADMINISTRATOR TO ENTER  
 INTO A LEASE AGREEMENT WITH LOWCOUNTRY REGIONAL  
 TRANSPORTATION AUTHORITY FOR THE COUNTY OWNED REAL PROPERTY  
 LOCATED AT 316 CASTLE ROCK ROAD**

**WHEREAS**, Beaufort County (“County”) is the fee simple owner of the property located at 316 Castle Rock Road, Beaufort, SC 29906 (“Property”); and

**WHEREAS**, the Lowcountry Regional Transportation Authority (“LRTA”) was established in 1978 as the primary public transportation provider for Beaufort County; and

**WHEREAS**, as the transportation authority, LRTA’s mission is to work relentlessly to achieve coordination and pursue customer service satisfaction while providing freedom of mobility and independence to our residents and visitors in an environmentally friendly manner; and

**WHEREAS**, the County desires to lease the Property to LRTA for the purpose of establishing vehicular storage for LRTA to further their mission. By leasing the Property to LRTA it will provide a centralized and secure location for vehicular storage that is currently not in place. Pursuant to the Beaufort County Lease Policy, the County desires to establish a nominal lease rate due to the benefit to the community that is otherwise unavailable; and

**WHEREAS**, County Council finds that it is in the best interest of the citizens and residents of Beaufort County for the County Administrator to enter into a lease with LRTA at a nominal rate for the Property.

**NOW, THEREFORE, BE IT ORDAINED** that Beaufort County Council, duly assembled, does hereby authorize the County Administrator to enter into a lease agreement with Lowcountry Regional Transportation Authority for the real property located at 314 Castle Rock Road.

Adopted this \_\_\_\_ day of \_\_\_\_\_, 2024.

COUNTY COUNCIL OF BEAUFORT COUNTY

BY: \_\_\_\_\_  
 Joseph Passiment, Chairman

ATTEST:

\_\_\_\_\_  
 Sarah W. Brock, Clerk to Council





Castle Rock Rd & Grober HI Rd



Item 14.

91 Grober HI Rd

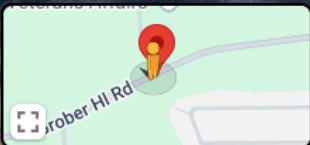
Beaufort, South Carolina



Google Street View

Apr 2022

[See more dates](#)



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# REAL PROPERTY LEASE AGREEMENT

**NOW, THEREFORE,** Landlord, for and in consideration of the rents paid and to be paid, and the covenants, conditions, and stipulations to be kept and performed by Tenant, agrees to lease the Premises described herein below.

## II. TERM

- ### III. RENTAL PAYMENT

- The first Rent payment shall be made on or before the Commencement Date. Tenant shall pay all rents due and owing, without deduction or set off, to Landlord at the address set forth in Section 9. All Rent payments shall be made in the form of check or direct deposit.

- IV. UTILITIES.** Tenant shall be responsible for paying one hundred (100%) percent of all utility expenses associated with the Premises during the Initial Term and any Renewal Term. Tenant warrants and agrees to establish accounts in its name with the providing/billing entity or authority and pay for all water, gas, power, electric current, garbage collection and removal, sewer charges,

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and all other utilities and utility charges and fees charged to the Premises during the term of this Lease and all extensions hereof. Tenant agrees to maintain all utilities at all times during its tenancy, regardless of whether or not Tenant is physically occupying the Premise.

**V. CONDITION, USE, MAINTENANCE AND REPAIRS OF PREMISES**

- 5.1 *Acceptance and Condition of the Premises.* The Parties mutually agree that Tenant shall take possession of the Premises on the Commencement Date. Tenant stipulates that he or she has examined the Premises, including the grounds and all buildings and improvements, and that they are, at the time of this Agreement, in good order, repair, and in a safe, clean and tenantable condition. Landlord has made no representation in connection with the Premises and shall not be liable for any latent defects therein; provided, however, that if such latent defects render the Premises uninhabitable for the purposes of this Lease, Tenant may at its option, and upon written notice to Landlord, terminate this Lease.
- 5.2 *Use of Premises.* Tenant shall use the Premises for the sole purpose of bus parking storage lot ("Permitted Use"). Any change in the use of the Premises may only be undertaken with the written consent of the Landlord. Tenant shall not use the Premises for any illegal purpose, nor violate any statute, regulation, rule or order of any governmental body in its use thereof, nor create or allow to exist any nuisances, nor do any act in or about the Premises or bring anything upon the Premises which will increase the premium for insurance on the Premises.
- 5.3 *Maintenance.* Tenant, at its sole cost and expense, shall handle or contract for the maintenance of the parking areas, fencing (including gates), landscaping, grounds and planting care for the Premises, and shall generally maintain the Premises in a neat and orderly condition.
- 5.4 *Repairs of Premises.* Landlord shall keep the foundations, exterior building, the roof of the Premises, the air conditioning, heating, electrical and plumbing systems contained within the Premises in good repair, except the Landlord shall not be required to make any repairs occasioned by acts of Tenant or sub tenant. In the event the Premises should become in need of repairs required to be made by Landlord hereunder, Tenant shall give immediate written notice thereof to Landlord. Except as otherwise provided in the Section, Tenant shall at its old cost and expense, maintain the Premises in good condition and repair, normal wear and tear expected.
- 5.5 Tenant shall provide minor maintenance and repairs to the Premises during the Term, up to a maximum cost of five hundred (\$500.00) dollars per repair to keep the Premises in good repair. Tenant shall not perform any additional work upon the Premises without prior written consent of the Landlord. The Premises shall be maintained in a clean and orderly manner. In the event of any damage of the Premises which is the direct result of Tenant, Tenant shall, immediately upon receiving demand from Landlord, correct the damage.
- 5.6 *Tenant Improvements, Alterations, and Restorations.*
- 5.6.1 *Initial Improvements.* Prior to Landlord's delivery of the Premises to Tenant, Landlord shall proceed to demolish and remove the existing ramp used for the convenience center, grade and level lot, replace existing chain link and wooden fences with a new chain link fence (including 2 rolling gates) and perform such improvements that are required to utilize the Premises for the Permitted Use, which shall include bus parking storage lot (the "Tenant's Initial Improvements").

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_

5.6.2 *Additional Improvements.* Tenant shall not make or permit to be made any structural alterations, modifications, additions, decorations or improvements to the Premises, nor shall Tenant make or permit any other work whatsoever that would directly or indirectly involve the penetration or removal (whether permanent or temporary) of, or require access through, in, under, or above any floor, wall or ceiling, or surface or covering thereof in the Premises.

5.6.3 *Cost of Improvements.* Landlord's Initial Improvements shall be made at Landlord's sole cost and expense. Any additional improvements as approved by the Landlord, shall be made at the Tenant's sole expense including the expense of complying with all present and future legal requirements, and any other work required to be performed in other areas within or outside the Premises.

5.6.4 *Compliance.* All such Tenant's Work shall be performed diligently and in a first class workmanlike manner and in accordance with plans and specifications approved by Landlord, and shall comply with all legal requirements. Any of Tenant's Initial Improvements or other alterations, including, without limitation, moveable partitions that are affixed to the Premise (but excluding moveable, free standing partitions) and all carpeting, shall at once become part of the Premises and the property of Landlord.

5.7 *Right of Inspection.* Landlord shall have the unfettered right at all reasonable times during the Initial Term or any Renewal Term to enter the Premises for any reason whatsoever. Landlord agrees, when able, to provide Tenant with reasonable notice of said entry upon the Premises. No notice will be required in emergency situations or for access or entry upon the Premises.

## **VI. DESTRUCTION OR DAMAGE**

6.1 If the Premises shall be damaged or destroyed during the term of this Lease by any casualty insured under Landlord's standard fire and casualty insurance, Landlord shall, except as otherwise provided in this Lease and subject to any delay or inability from causes beyond its control, repair and/or rebuild the same substantially to what had been the condition thereof immediately prior to such damage or destruction.

6.2 If the Premises shall be damaged or destroyed to the extent of fifty percent (50%) or more of the insurable value thereof, or if such casualty shall not have been insured against by Landlord's standard fire and casualty policies, then Landlord or Tenant may terminate this Lease or elect to repair such damage or rebuild the Premises. Within thirty (30) calendar days after any such casualty, Landlord shall notify Tenant whether Landlord intends to repair or rebuild the Premises, and Tenant shall notify Landlord whether Tenant intends to terminate this Lease. If Landlord elects to repair or rebuild the Premises, Landlord shall perform such repair or rebuilding as provided in this Agreement. If Landlord elects not to repair or rebuild, the Lease shall terminate without further notice and all further obligations of both parties hereunder shall cease (other than those which shall theretofore have accrued), effective as of the date on which Tenant ceases doing business on the Premises.

6.3 If Landlord elects to repair the Premises and Tenant does not elect to terminate the Lease, and if Landlord's repairs are not substantially completed within one hundred twenty (120) calendar days following the date of the casualty, then Tenant, upon not less than thirty (30) calendar days written notice to Landlord, may terminate this Lease if Landlord has not substantially completed such

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_

repairs within the time period (which shall not be less than 30 calendar days) set forth in such notice. Substantial completion, as used herein, shall mean that the Premises are restored to the condition that they may be occupied and utilized for their intended purpose, notwithstanding that there may be additional "punch list" or other non-essential items to be completed, which neither affect nor impact Tenant's use and enjoyment of the Premises. Nevertheless, Landlord shall diligently pursue the completion of all remaining work in a timely manner.

- 6.4 During any period of reconstruction or repair of the Premises, provided Tenant has not elected to terminate this Lease, Tenant may at its sole option continue the operation of Tenant's business in the Premises to the extent reasonably practicable from the standpoint of good business practice. Tenant shall not interfere with the repair or restoration activities of Landlord or its contractors, and will adapt and modify its business activities as deemed necessary by Landlord to allow such repair or restoration activities to continue expeditiously.
- 6.5 During any period in which, by reason of any damage or destruction not resulting from the negligence of Tenant, Tenant's employees, agents, or invitees, Tenant is unable to occupy all or a portion of the Premises, Tenant's rent shall be appropriately abated for that part of the Premises rendered unusable for the conduct of Tenant's business. Such abatement shall continue for the period commencing with such destruction or damage and ending with the substantial completion by Landlord of Landlord's repairs and/or rebuilding of the Premises, as described in this Lease.

## **VII. ASSIGNMENT AND SUBLETTING**

The Tenant shall not, without the Landlord's prior written consent: (i) mortgage, pledge, encumber, or otherwise transfer (whether voluntarily, by operation of law, or otherwise) this Lease or any interest hereunder; (ii) allow any lien to attach to Tenant's interest in the Premises or this Lease; or (iii) permit the use or occupancy of the Premises or any part thereof by anyone for a purpose other than as set forth herein; . Any assignment or subletting of this Lease shall be at a reasonable rate to cover minor maintenance without profit to the Tenant. Assignment of the Lease will not relieve the Tenant or the Guarantors of their respective obligations under this Lease and Guaranty Agreement unless otherwise agreed by Landlord in writing.

## **VIII. TERMINATION.** This Lease shall end on the Termination Date. This Lease may be terminated by Parties prior to the Termination Date upon providing a ninety (90) day notice to Tenant and/or upon the occurrence of any default event as set forth in Section 8.

- 8.1 *Termination for Convenience.* The Parties agree that this Lease may be terminated by the Landlord for convenience with a ninety (90) day written notice to the Tenant. Upon receipt of the notice, Tenant shall surrender the Premises without any additional notice.
- 8.2 *Surrender of Property.* At the termination of this Lease, Tenant agrees to quit and deliver the Premises peaceably and quietly to Landlord, or its attorney, or other duly authorized agent, at the expiration or other termination of this Lease. The Tenant shall surrender the Premises in as good state and condition as delivered to Tenant at the commencement of this Lease, reasonable use and wear thereof expected.

## **IX. DEFAULT**

- 9.1 *Default by Tenant.* The occurrence of any of the following shall constitute an event of default:

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_

- (a) The rent of any other sum of money payable under this Lease, whether to Landlord or otherwise, is not paid within ten (10) days of the due date.
- (b) Tenant's interest in the Lease of the Premises shall be subjected to any attachment, levy, or sale pursuant to any order or decree entered against Tenant in any legal proceeding and such order or decree shall not be vacated within thirty (30) days of entry thereof; unless with respect to any attachment, levy or sale, which cannot be vacated within thirty (30) days, Tenant in good faith shall have commenced and thereafter shall continue to diligently pursue the vacation of such order or decree by lawful means.
- (c) Tenant breaches or fails to comply with any term, provision, condition, or covenant of this Lease, other than the payment of rent, or with any of the rules and regulations now or hereafter established from time to time by the Landlord to govern the operation of the building and such breach or failure to comply is not cured within ten (10) days after written notice of such breach or failure to comply is given to Tenant.

9.2 *Remedies of Landlord.* Upon the occurrence of an event of default by Tenant other than a failure of Tenant to timely pay a sum that is due and payable, Landlord shall notify Tenant in writing of the event of default, and Tenant shall, within twenty (20) days of receipt of such written notice cure such event of default. Where the Tenant fails to cure such event of default within twenty (20) days of receipt of the above-referenced written notice, Landlord shall have the option to do and perform any one or more of the following in addition to, and not in limitation of, any other remedy or right permitted by law or in equity or by this Lease. In electing to do any one or more of the following courses of conduct, the Landlord must reasonably undertake its best efforts to properly mitigate any damages caused or sustained by Landlord due to the occurrence of an event of default by the Tenant. The options and courses of conduct which may be undertaken by the Landlord in an event of default by the Tenant are as follows:

- (a) Landlord, with or without terminating this Lease, may immediately or at any time thereafter re-enter the Premises and correct or repair any condition which shall constitute a failure on Tenant's part to keep, observe, perform, satisfy, or abide by any term, condition, covenant, agreement or obligation of this Lease or of the rules and regulations adopted by the Landlord or of any notice given Tenant by Landlord pursuant to the terms of this Lease, and Tenant shall fully reimburse and compensate Landlord on demand for all reasonable expenses.
- (b) Landlord, with or without terminating this Lease may immediately or at any time thereafter demand in writing that Tenant immediately vacate the Premises whereupon Tenant shall immediately vacate the Premises and, immediately remove therefrom all personal property belonging to Tenant, whereupon Landlord shall have the right to immediately re-enter and take possession of the Premises. Any such demand, re-entry and taking of possession of the Premises by Landlord shall not of itself constitute an acceptance by Landlord of a surrender of this Lease or of the Premises by Tenant and shall not of itself constitute a termination of this Lease by Landlord. In the event the Landlord re-enters and takes possession of the Premises as provided above and the Tenant has failed upon request by Landlord to immediately remove from the Premises all property belonging to or placed upon the Premises by the Tenant, the Landlord shall have the right to have such property of the Tenant removed from the Premises and reasonably be placed within a secure storage facility for a period of time not to exceed thirty (30) days, and all costs of handling, moving and storing such property of the Tenant shall

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_

be paid by the Tenant. Notwithstanding any of the foregoing, Landlord shall be required to comply with applicable South Carolina law regarding reentry and possession of the Premises.

- (c) Landlord may immediately or at any time thereafter terminate this Lease, and this Lease shall be deemed to have been terminated upon receipt by Tenant of written notice of such termination; upon such termination Landlord shall recover from Tenant all damages Landlord may suffer by reason of such termination including, without limitation, all arrearages in rentals, costs, charges, additional rentals, and reimbursements, the cost (including court costs and attorneys' fees) of recovering possession of the Premises, and, in addition thereto, Landlord at its election shall have and recover from Tenant either: (1) an amount equal to the excess, if any, of the total amount of all rents and other charges to be paid by Tenant for the remainder of the term of this Lease over the then reasonable rental value of the Premises for the remainder of the Term of this Lease, or (2) the rents and other charges which Landlord would be entitled to receive from Tenant if the Lease were not terminated. Such election shall be made by Landlord by serving written notice upon Tenant of its choice of the alternatives within thirty (30) days of the notice of termination. Notwithstanding anything hereunder to the contrary, Landlord must use its reasonable best efforts to re-let the Premises and abate Landlord's damages.

- 9.3 *No Waiver.* No course of dealing between Landlord and Tenant or any failure or delay on the part of Landlord in exercising any rights of Landlord under any provisions of this Lease shall operate as a waiver of any rights of Landlord, nor shall any waiver of a default on one occasion operate as a waiver of any subsequent default or any other default. No express waiver shall affect any condition, covenant, rule or regulation other than the one specified in such waiver and that one only for the time and in the manner specifically stated.
- 9.4 *No Election of Remedies.* The exercise by Landlord of any right or remedy shall not prevent the subsequent exercise by Landlord of other rights and remedies. All remedies provided for in this Lease are cumulative and may, at the election of Landlord, be exercised alternatively, successively, or in any other manner, and all remedies provided for in this Lease are in addition to any other rights provided for or allowed by law or in equity.
- 9.5 *Insolvency or Bankruptcy.* The appointment of a receiver to take possession of all or substantially all of the assets of Tenant, or an assignment by Tenant for the benefit of creditors, or any action taken or suffered by Tenant, or any action against Tenant, under any insolvency, bankruptcy, or reorganization, shall at Landlord's option constitute an event of default under this Lease. Upon the happening of any such event of default or at any time thereafter, this Lease shall terminate five (5) days after written notice of termination from Landlord to Tenant. In no event shall this Lease be assigned or assignable by operation of law or by voluntary or involuntary bankruptcy proceedings or otherwise and in no event shall this Lease or any rights or privileges hereunder be an asset of Tenant under any bankruptcy, insolvency, or reorganization proceedings.
- 9.6 *Abandonment.* Tenant shall not be considered to have abandoned or vacated the Premises as long as Tenant continues to pay rent and fulfill all other obligations of this Lease, regardless of whether Tenant is actually continuously occupying the space or not, unless Tenant gives notice of termination if and as allowed by this Lease. If Landlord's right of entry is exercised following abandonment of the Leased Premises by Tenant, then Landlord may consider any personal property belonging to Tenant and left on the Leased Premises to have been abandoned, in which case

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_

Landlord may dispose of all such personal property in any manner Landlord shall deem proper and is hereby relieved of all liability for doing so.

**X. SALE OF PREMISES.** In the event the Landlord hereunder, or any successor owner of the Premises, shall sell or convey the Premises, all liabilities and obligations on the part of the Landlord, or such successor owner, under this Lease accruing thereafter shall remain for a minimum sixty (60) days or the Tenant may enter into a new Lease with the successor owner.

**XI. COMPLIANCE WITH LAWS.** Tenant shall comply, at its own expense, with all statutes, regulations, rules, ordinances and orders of any governmental body, department, or agency thereof which apply to or result from Tenant's use of the Premises.

**XII. INSURANCE LIABILITY AND INDEMNIFICATION**

12.1 *Insurance Liability.* Landlord has obtained Premise Liability Insurance, which does not cover Tenant's possessions or Tenant's negligence. Tenant must obtain an Insurance Policy in an amount of no less than \$1,000,000 in commercial general liability and other appropriate policies to cover damage or loss on the property or due to Tenant's negligence, and to cover all of Tenant's assets stored or located on the Premises. Tenant shall name Landlord as an additional party on any and all insurance policies and shall provide Landlord with a copy of all policies.

12.1.1 Tenant shall provide proof that payment for the insurance policy has been made initially and thereafter and that the policy has been renewed at least fifteen (15) calendar days prior to the anniversary of the initial year of this lease. Landlord may contact Tenant's insurer(s) or insurer(s)' agent(s) directly at any time regarding Tenant's coverage, coverage amounts, or other such relevant and reasonable issues related to this Lease.

12.2 *Indemnity.* To the extent permissible by law, the Tenant hereby agrees to indemnify and hold harmless Landlord against and from any and all claims for property damage, or for personal injury, arising out of or in any way arising out of Tenant's use of the Leased Premises or from any activity, work, or thing done, permitted or suffered by Tenant in or about the Leased Premises. Tenant agrees to include substantially similar terms as provided in this Section in any sublease agreement.

12.3 *Liens.* If any mechanic's or other lien is filed against the Premises for work claimed to have been for or materials furnished thereto, such lien shall be discharged by Tenant within Ten (10) days thereafter, at Tenant's expense by full payment thereof by filing a bond required by law. Tenant's failure to do so shall constitute a material default hereunder.

**XIII. MISCELLANEOUS PROVISIONS**

13.1 *Notices.* Any notice, communication, request, approval or consent which may be given or is required to be given under the terms of this Agreement shall be in writing and shall be transmitted (1) via hand delivery or express overnight delivery service to the Seller or the Purchaser, (2) via facsimile with the original to follow via hand delivery or overnight delivery service, or (3) via e-mail, provided that the sending party can show proof of delivery, as the case may be, at the addresses/numbers set forth below:

AS TO LANDLORD:      Beaufort County  
Attn: Beaufort County Administration  
Post Office Box 1228

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_



Beaufort, SC 29901

Copy To: Beaufort County  
Attn: Beaufort County Public Facility Director  
Post Office Box 1228  
Beaufort, SC 29901

AS TO TENANT: Lowcountry Regional Transportation Authority  
Attention: Administration  
PO Box 209  
25 Benton Field Drive  
Bluffton, SC 29910

Copy To: Lowcountry Regional Transportation Authority  
Attention: Administration  
PO Box 209  
25 Benton Field Drive  
Bluffton, SC 29910

- 13.2 *Entire Agreement.* This Lease constitutes as the sole and entire agreement of Landlord and Tenant and no prior or contemporaneous oral or written representations or agreements between the parties affecting the Premises shall have any legal effect.
- 13.3 *Counterparts.* This Agreement may be executed in counterparts. Each of the counterparts shall be deemed an original instrument, but all of the counterparts shall constitute one and the same instrument.
- 13.4 *Severability.* If any portion of this Lease shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If a court finds that any provision of this Lease is invalid or unenforceable, then such provision shall be deemed to be written, construed and enforced as so limited.
- 13.5 *Amendment.* This Agreement cannot be amended orally or by a single party. No amendment or change to this Agreement shall be valid unless in writing and signed by both Parties to this Agreement.
- 13.6 *Captions.* The captions used in this Lease are for convenience only and do not in any way limit or amplify the terms and provisions hereof.
- 13.7 *Successors and Assigns.* The provisions of this Lease shall inure to the benefit of and be binding upon Landlord and Tenant, and their respective successors, heirs, legal representatives, and assigns.
- 13.8 *Applicable Law.* The laws of the State of South Carolina shall govern the interpretation, validity, performance and enforcement of this Lease; and, of any personal guarantees given in connection with this Lease.

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_

- 13.9 *Authority.* Each individual and entity executing this Agreement hereby represents and warrants that he, she or it has the capacity set forth on the signature pages hereof with full power and authority to bind the party on whose behalf he, she or it is executing this Agreement to the terms hereof.
- 13.10 *Force Majeure.* Except for timely Rent payment, Landlord or Tenant shall not be in default hereunder when performance of any term or condition is prevented by a cause beyond its control.
- 13.11 *Time is of the Essence.* Time is of the essence of this Lease.
- 13.12 *Quiet Enjoyment.* Landlord hereby covenants, warrants and agrees that so long as Tenant is performing all of the covenants and agreements herein stipulated to be performed on the Tenant's part, Tenant shall at all times during the lease term have the peaceable quiet and enjoyment and possession of the Premises without any manner of hindrance from Landlord or any person or persons lawfully claiming the Premises, or any part thereof.

**IN WITNESS WHEREOF,** and in acknowledgement that the parties hereto have read and understood each and every provision hereof, the Parties have caused this Agreement to be executed on the date first written above.

**LANDLORD:**

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Michael R. Moore  
*Beaufort County Administrator*

\_\_\_\_\_  
Witness

**TENANT:**

\_\_\_\_\_  
Witness

\_\_\_\_\_  
By: \_\_\_\_\_  
Its: \_\_\_\_\_

\_\_\_\_\_  
Witness

Landlord Initials \_\_\_\_\_ Tenant Initials \_\_\_\_\_



## BEAUFORT COUNTY COUNCIL AGENDA ITEM SUMMARY

Item 1.

**ITEM TITLE:**

Recommend Approval of demolition of the Agnes Major Community Center to be performed by Public Works.

**MEETING NAME AND DATE:**

Finance, Administration and Economic Development Committee – September 23, 2024

**PRESENTER INFORMATION:**

Hank Amundson, Special Assistant to the Administrator (5 mins)

**ITEM BACKGROUND:**

Beaufort County has issued an RFQ for Design-Build services for a new Agnes Major Community Center and are currently interviewing firms for this work. In anticipation of this new construction, the old building must be demolished. We plan to self-perform this demolition through Public Works and require Committee and Council approval to move forward as this is a Beaufort County facility.

**PROJECT / ITEM NARRATIVE:**

Demolition at the existing Agnes Major Community Center will be the first phase of development for the design & construction of a new community Center. Staff is currently interviewing the top two candidates for the Design-Build phase of the long-awaited project.

**FISCAL IMPACT:**

None

**STAFF RECOMMENDATIONS TO COUNCIL:**

Staff recommends approval of this demolition project to make way for a new community Center.

**OPTIONS FOR COUNCIL MOTION:**

Motion to approve/deny recommendation of Demolition.

Next Step: move forward to County Council on October 14, 2024, to approve Agness Major Community Center building demolition.





# BEAUFORT COUNTY COUNCIL

## AGENDA ITEM SUMMARY

Item 2.

<b>ITEM TITLE:</b>
<b>RECOMMENDATION TO ACCEPT SCAC GRANT FOR \$750,000 FOR HXD TERMINAL IMPROVEMENT PROJECT</b>
<b>MEETING NAME AND DATE:</b>
Finance, Administration & Economic Development Committee; September 23, 2024
<b>PRESENTER INFORMATION:</b>
Jon Rembold; Airports Director 3 minutes
<b>ITEM BACKGROUND:</b>
<p>Council Resolution 2022/25 directed staff to proceed with the terminal project.</p> <p>June 2022: SC Senator Davis announced to County Council this item was approved as a line item in the South Carolina Budget for FY 2023.</p> <p>Beaufort County Airports Board approved the proposed resolution to accept the funding during its regular meeting held on July 18, 2024.</p>
<b>PROJECT / ITEM NARRATIVE:</b>
<p>In May 2022, South Carolina House Representative Jeff Bradley informed Beaufort County via the Hilton Head Island Airport that, because of communications between the airport team, county administration, and our state delegation, a \$750,000 line item for HXD's terminal construction was to be part of the Governor's approved budget.</p> <p>As directed by the Governor's Office, this grant will be used for terminal construction and is administered through the SC Aeronautics Commission Office (SCAC). This grant does <i>not</i> require a local match.</p>
<b>FISCAL IMPACT:</b>
<p>This is a \$750,000 line item in the state's budget for the initial phase of terminal construction. It does not require a match, so there is no local fiscal impact. Further, the grant document details the funding associated with this project. These funds, since they are a budget line item, can be drawn at one time and used in support of project invoices.</p> <p>The Special Allocation provides 100% of the project funding (\$750,000).</p> <p>Grant Expenditures - GL Code 5402-90-0000-57130 (Only if needed. )</p>
<b>STAFF RECOMMENDATIONS TO COUNCIL:</b>
Staff recommends acceptance of SCAC Grant in the amount of \$750,000 for HXD Terminal Improvement Project
<b>OPTIONS FOR COUNCIL MOTION:</b>
<p>Motion to approve/deny acceptance of SCAC Grant in the amount of \$750,000 for HXD Terminal Improvement Project</p> <p>Move forward to Council for Approval on October 14, 2024</p>



# PROJECT GRANT APPLICATION

(State Aid for Development of Public Airports)

SCAC Grant No: \_\_\_\_\_  
(Leave blank – For SCAC Use only)

Date: June 26, 2024

## PART I - PROJECT INFORMATION

Grant Type being Requested (Check one):

- ☐ 5% State match of 90% AIP Grant
- ☐ 50% Terminal Building Development Grant (NTE \$500,000)
- ☐ 60% State – Local Airport Development Grant
- ☐ 80% Non-NPIAS, Publicly owned, Airport Maintenance or Development Grant
- ☐ 90% NPIAS Airport Secondary Runway Redevelopment Grant
- ☐ 100% Commercial Carrier Airport Entitlement Funds
- ☒ 100% Other – **Special Allocation**

**Beaufort County** (herein called the "Sponsor") hereby makes application to the South Carolina Aeronautics Commission (herein designated "SCAC") for a grant of State funds pursuant to applicable statutes, regulations, and policies, for the purpose of aiding in financing a project (herein called the "Project") for the development of the **Hilton Head Island Airport** (herein called the "Airport") located in the County of **Beaufort** in the State of South Carolina.

It is proposed that the project consist of the following described airport development (Insert brief project description / title below):

### **Hilton Head Island Airport Terminal Improvements**

all as more particularly described in the plans and specifications separately submitted to SCAC on **NOT APPLICABLE**, which are made a part hereof by reference.

## PART II - REPRESENTATIONS

(Revised: February 13, 2024)

2024 HXD Hilton Head Island Airport Terminal Improvements



The Sponsor hereby represents and certifies as follows:

1. Legal Authority. The Sponsor has the legal power and authority:
  - (A) To do all things necessary to undertake and carryout the Project in conformity with the applicable statutes, regulations, and policies;
  - (B) To accept, receive and disburse grant funds from the State of South Carolina in aid of the project on the terms and conditions stated in the applicable statutes, regulations, policies, and proposed grant agreement, and;
2. Funds. The Sponsor now has on deposit **\$0.00** for use in defraying the costs of the Project. The present status of these funds is as follows: **in the Hilton Head Island Airport Capital fund.**

The Sponsor hereby designates (insert name and job title of staff member): **Brian Cronin, Airports Finance Manager** to receive payments representing SCAC's share of the Project costs.

**Jon Rembold, C.M.**

Printed Name of Sponsoring Agency's Representative

Signature of Sponsoring Agency's Representative

**Airports Director**  
Representative Title

## ATTACHMENT A

THE FOLLOWING IS A SUMMARY OF THE ESTIMATED COSTS OF THE PROJECT:

ITEM	TOTAL ESTIMATED COST	ESTIMATED SPONSOR'S SHARE OF COST	ESTIMATED FEDERAL SHARE OF COST	ESTIMATED STATE SHARE OF COST
		AMOUNT	AMOUNT	AMOUNT
1. PLANNING COST	\$0.00	\$0.00	\$0.00	\$0.00
2. LAND COST	\$0.00	\$0.00	\$0.00	\$0.00
3. CONSTRUCTION COST	\$750,000.00	\$0.00	\$0.00	\$750,000.00
4. ENGINEERING COST	\$0.00	\$0.00	\$0.00	\$0.00
5. ADMINISTRATIVE COST	\$0.00	\$0.00	\$0.00	\$0.00
6. MISCELLANEOUS	\$0.00	\$0.00	\$0.00	\$0.00
7. TOTAL ALL ESTIMATED PROJECT COSTS	\$750,000.00	\$0.00	\$0.00	\$750,000.00

## ATTACHMENT B

### DOCUMENTATION SUPPORT

1. Is this project a result of facility requirements determined by a Master Plan, Airport Layout Plan (ALP), the South Carolina Airport System Plan, or a revision to the ALP? ☒ Yes ☐ No

If so, indicate FAA or SCAC approval date: September 2011

2. Does this project require an Environmental Impact Assessment (EIAS) report under the National Environmental Policy Act of 1969 (NEPA)? ☒ Yes ☐ No

3. Status of EIAS Finding of No Significant Impact/Record of Decision for Terminal Are Improvements at Hilton Head Island Airport – April 23, 2020

4. Have all previous projects that involved federal and / or state funds been completed?  
 \_\_\_\_\_ Yes ☒ No (List all Open Federal and State Grants below)

3-45-0030-045-2019

3-45-0030-047-2021

3-45-0030-050-2022

23-019; 23-029

3-45-0030-051-2022

3-45-0030-052-2022

3-45-0030-053-2023

3-45-0030-054-2023

23-030

23-025

23-063

24-001

5. If the State is unable to participate to the extent requested, what is the Sponsor's ability to fund a share greater than the State match? Sponsor's ability to match is limited

6. Name of Regional Planning Council which airport is located: Lowcountry Council of Governments

7. Has Federal Application Form 424 been submitted to the Inter-agency Council on Public Transportation (State Clearinghouse) in accordance with Section 57-3-1050? \_\_\_\_\_ Yes ☒ No

8. The following action has been taken by the local governing body to provide steps toward protective zoning of the airspace and land surrounding the airport. Describe actions by the Sponsor and governing body related to land use planning and zoning ordinances.

#### **Town of Hilton Head Island Land Management Ordinance**

9. Anticipated date construction or planning / design project is to commence:

(Revised: February 13, 2024)

2024 HXD Hilton Head Island Airport Terminal Improvements

Start Date: **February 2024**

Ending Date: **February 2026**

(Revised: February 13, 2024)

2024 HXD Hilton Head Island Airport Terminal Improvements

## ENCLOSURES

### 1. Project Justification Statement/Document

This project is Phase I of Commercial Service Terminal Renovations and Expansion program which involves the renovation and expansion of the commercial service terminal at the Hilton Head Island Airport to accommodate existing and future airline passenger demands on passenger terminal facilities.

These improvements will expand the existing 18,515 square foot terminal facility to an approximately 67,000 square foot facility. The expansion will include airline ticket counter and passenger queueing areas, airline ticket office areas, TSA baggage screening areas, bag make up areas, TSA passenger security checkpoint areas, passenger holdroom and gate areas, baggage drop-off and baggage claim areas with two new baggage carousels, public restrooms, circulations areas, pre-security and post security food, beverage and retail concession areas and office areas.

This project will also include renovations and improvements to the baggage claim area and various improvements to the finishes throughout the terminal.

Construction phase services required during the commercial service terminal improvements are also included in the project.

Phase I includes the construction of TSA passenger security checkpoint areas, passenger holdroom and gate areas, and post security food, beverage and retail concession areas and office areas.

#### **Project Objective:**

This project objective is to enhance capacity at the Airport by providing the necessary space to process existing and future passenger activity in an efficient manner.

#### **Project Justification:**

This project is necessary to address the inadequate capacity of the existing passenger terminal building. The existing passenger terminal size and facilities are unable to process existing and future passenger volumes in a suitable manner. This inadequacy is the result of the significant increase in passenger activity at the Airport following completion of the 700-foot runway extension project in July 2018. In less than one year after the completion of the runway extension, the Airport has increased from a single airline, single market facility to a thriving facility served by three network airlines serving seven markets.

In addition to the increased airline service, American Airlines (AA) transitioned from Bombardier Q200 and Q300 turboprop aircraft to Embraer (E) 175 regional jets in July 2018 serving Charlotte-

(Revised: February 13, 2024)

2024 HXD Hilton Head Island Airport Terminal Improvements

Douglas International Airport (CLT) with three daily flights and added weekend flights to Ronald Reagan Washington National Airport (DCA) in May 2019.

United Airlines (UA) started seasonal (April through mid-September) service with Embraer 175 aircraft in late March 2019 with two daily flights to Washington Dulles International Airport (IAD) and weekend service to Chicago O'Hare International Airport (ORD) and Newark Liberty International Airport (EWR).

Delta Air Lines (DL) started service in May 2019 with Embraer 170 aircraft, providing three daily flights to Hartsfield-Jackson Atlanta International Airport (ATL) and seasonal (June through August) weekend service to LaGuardia Airport (LGA, June 2019).

The commercial service airline schedule at HXD currently includes 14 daily weekday flights and 24 weekend flights to CLT, ORD, EWR, LGA, ATL, PHL, DCA, BOS.

In 2017, the last full year of commercial turboprop service to Hilton Head Island, enplanements were 26,220. Projections of annual enplanements reflecting the expanded service, were approximately 180,000. That projected increase in enplanements developed very quickly following the completion of the runway extension project, the increase in airlines serving the Airport and the transition of aircraft fleet mix at the Airport from Dash 8 turboprops to the EMB-170/175 jet aircraft.

The airport intends to use the \$750,000 allocated by the South Carolina legislature in 2023 to the Phase I construction of the terminal building.



## 2. Request-for-Aid/Project Sketch –

June, 2024 Construction Update



### HILTON HEAD ISLAND AIRPORT Phase 1 Terminal Improvements

June 2024  
Stakeholder Update



**HILTON HEAD ISLAND**

A I R P O R T

[hiltonheadairport.com](http://hiltonheadairport.com)

(Revised: February 13, 2024)

2024 HXD Hilton Head Island Airport Terminal Improvements

# KEY WORK ITEMS ACCOMPLISHED

(April 22nd-June 6th)

- Surface wall installed and grouted
- Slab poured and cured (lower)
- Slab prep and grading complete (upper)
- Arrival/Departure lanes palm trees and shrubs removed
- Curbing for new entrance lane complete
- Underground facilities under entrance lane removed and reconfigured
  - Stormwater piping

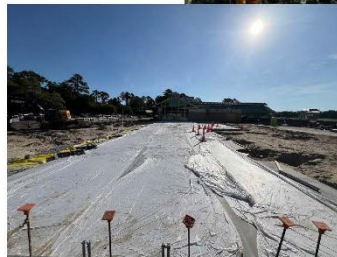
## PROGRESS PHOTOS



Surface/Slab wall,  
pre-Slab Pour



"Lower" Slab  
Pour



(Revised: February 13, 2024)

2024 HXD Hilton Head Island Airport Terminal Improvements

## PROGRESS PHOTOS



"Upper" Slab  
Grading



Arrival Lane Demo

## PROGRESS PHOTOS



Entrance  
Lane Curb  
Installation



Entrance Lane  
Underground  
Work



# MILESTONE SCHEDULE

HHIA-022 - Hilton Head Island Airport Terminal Improvements 2024 March Update							2024												2025													
Activity ID	Area	Activity Name	Original Duration	Remaining Duration	Start	Finish	Free Float	Total Float	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A
<b>Milestones</b>			627	501	14-Sep-23A	27-Feb-26	0	0																								
<b>Contract Milestones</b>			868	28	14-Sep-23A	27-Feb-26	0	0																								
No Area			868	28	14-Sep-23A	27-Feb-26	0	0																								
CM1000	Owner Contract Execution		0	0	14-Sep-23A																											
CM1010	Notice to Proceed		0	0	01-Feb-24A																											
CM1020	Substantial Completion		0	0		30-Jan-26	0	0																								
CM1030	Final Completion		0	0		27-Feb-26	0	0																								
<b>Project Milestones</b>			414	377	22-Jan-24A	02-Sep-25	0	104																								
No Area			414	377	22-Jan-24A	02-Sep-25	0	104																								
PM1000	New Temporary Airside Access Gate #1A Open		0	0		22-Jan-24A																										
PM1010	Existing Airside Gate #1 Closure		0	0	23-Jan-24A																											
PM1020	Employee & Cell Phone Lot Closed		0	0	05-Feb-24A																											
PM1030	Existing Baggage Canopy/Entrance Closure		0	0	25-Feb-24A																											
PM1040	Existing Baggage Canopy/Entrance Re-Open		0	0		08-Mar-24	0	25																								
PM1050	Existing Main Ent. Canopy/Entrance Closure		0	0	11-Mar-24		0	25																								
PM1070	Existing Main Ent. Canopy/Entrance Re-Open		0	0		14-Mar-24	0	25																								
PM1080	Existing Existing Canopy/Entrance Closure		0	0	15-Mar-24		0	25																								
PM1090	Public Parking Partial Closure		0	0	28-Mar-24		0	10																								
PM1060	Existing Existing Canopy/Entrance Re-Open		0	0		28-Mar-24	25	25																								
PM1100	Employee Lot Re-Open		0	0		02-May-24	0	0																								
PM1110	Traffic Shift to Outside West/South Entrance Road Realignment		0	0		02-May-24	0	0																								
PM1120	East Airside Gate #12 Closure		0	0		15-Aug-24	0	0																								
PM1130	Traffic Shift to North Lanes Entrance Road Realignment		0	0		15-Aug-24	0	0																								
PM1140	Public Parking Re-Open		0	0		20-Aug-24	67	306																								



- POUR AND CURE UPPER SLAB
- MANAGE TRAFFIC PATTERN CHANGES
- BUILD AND PREP FOR FINAL FOOTER ENCROACHING ARRIVAL LANE
- BUILD NEW ENTRANCE ROAD
- PREP STEEL AND BEGIN GROUND UP CONSTRUCTION

## NEAR-TERM LOOK-AHEAD

7

(Revised: February 13, 2024)  
2024 HXD Hilton Head Island Airport Terminal Improvements

## IMPORTANT COORDINATION ITEMS

- Coordination with terminal tenants & customers for parking disturbances
  - Parking and traffic flow impact for 2 to 4 months
  - Website, social media updates
- Traffic Control and night work monitoring
- Summer season push – Airport Ambassadors on duty



Coming soon...



**3. Engineer's Estimate of Construction Cost –**

Phase I Project Cost (Under Contract)	\$39,108,163
AIP Grants Existing:	
Grant # 3-45-0030-045-2019	\$10,000,000
Grant # 3-45-0030-045-2022	\$11,626,638
State Grants:	
Grant 23-019	\$3,000,000
Grant 23-029	\$12,000,000
Grant TBD:	\$750,000
Airport:	\$2,157,881

**4. Copy of Federal Application Form 424 (if this request is associated with a FAA AIP Grant) –**

Not Applicable



**RESOLUTION 2024/\_\_\_\_\_****A RESOLUTION TO ACCEPT SCAC GRANT FOR THE HILTON HEAD ISLAND AIRPORT (HXD) TERMINAL IMPROVEMENT PROJECT**

**WHEREAS**, Council approved the Hilton Head Island Airport to undergo major renovations in Resolution 2022/25 which included a project involving the renovation and expansion of the commercial service terminal at the Hilton Head Island Airport; and

**WHEREAS**, Phase I includes the construction of TSA passenger security checkpoint areas, passenger hold room and gate areas, and post-security food, beverage, and retail concession areas and office areas; and

**WHEREAS**, the South Carolina Aeronautics Commission (SCAC) has approved a grant for the Hilton Head Island Airport which will be used to fund Phase I of the Hilton Head Island Airport Terminal Improvement Project; and

**WHEREAS**, the total SCAC grant is \$750,000 for use in the construction of TSA passenger security checkpoint areas, passenger hold room and gate areas, and post-security food, beverage, and retail concession areas and office areas; and

**WHEREAS**, the SCAC grant will provide 100% of the total project cost for the construction of TSA passenger security checkpoint areas, passenger hold room and gate areas, and post-security food, beverage, and retail concession areas and office areas.

**NOW, THEREFORE, BE IT RESOLVED** that Beaufort County Council, duly assembled, does hereby authorize the County Administrator to accept SCAC Grant funding for the Hilton Head Island Airport Terminal Improvement Project.

Adopted this \_\_\_\_ day of \_\_\_\_\_, 2024

COUNTY COUNCIL OF BEAUFORT COUNTY

BY: \_\_\_\_\_

Joseph Passiment, Chairman

ATTEST:

\_\_\_\_\_  
Sarah W. Brock, Clerk to Council

Approved by S Parry 7/24/2024



## BEAUFORT COUNTY COUNCIL AGENDA ITEM SUMMARY

Item 3.

ITEM TITLE:
RECOMMEND APPROVAL OF A RESOLUTION AUTHORIZING THE COUNTY ADMINISTRATOR TO ADOPT AND IMPLEMENT THE LOCAL ACCOMMODATIONS TAX AND LOCAL HOSPITALITY TAX GRANT FUNDING POLICY.
MEETING NAME AND DATE:
Finance, Administration, and Economic Development Committee September 23, 2024
PRESENTER INFORMATION:
John Robinson, ACA Public Safety 10 minutes
ITEM BACKGROUND:
April 8, 2024, Ordinance 2024/13 was adopted by County Council amending Chapter 66 Taxation, Article II Accommodations Tax Board, Division 1. Generally, and Division 2. Accommodations 3% tax and Ordinance 2024/15 was adopted by County Council amending Chapter 66 Taxation, Article V Hospitality Tax. On June 17, 2024, Council adopted by Ordinance, Appropriation of Funds for Fiscal Year 2024-2025 Generated by Local 2% Accommodations Tax and Hospitality Tax. The Policy attached is the process by which Beaufort County will create an advisory board and award appropriated funds in accordance with Beaufort County Ordinance.
PROJECT / ITEM NARRATIVE:
The Local A-Tax and Local H-Tax funding policy is a result of a draft policy being presented at a Finance Committee workshop on August 14, 2024. Staff received input and guidance from Committee members as well as public input and incorporated as appropriate.
FISCAL IMPACT:
None- implementation of appropriate budget in accordance with ordinance and policy
STAFF RECOMMENDATIONS TO COUNCIL:
Staff recommends approval of the Resolution to adopt the Local A/H Tax Grant Funding Policy
OPTIONS FOR COUNCIL MOTION:
Motion to approve/deny the approval of a Resolution to adopt the Local A/H Tax Grant Funding Policy Next steps - Move forward to Council for approval on October 14, 2024

**RESOLUTION 2024/****A RESOLUTION ADOPTING THE LOCAL ACCOMMODATIONS AND LOCAL HOSPITALITY TAX GRANT FUNDG POLICY**

**WHEREAS**, the Beaufort County Council (“Council”) finds that it is in the best interest of Beaufort County (“County”) and other recipients of appropriated Local 3% Accommodation and Local 2% Hospitality Tax to establish a uniform grant funding policy; and

**WHEREAS**, the current Beaufort County Accommodations and Hospitality Tax Ordinances were amended on June 17, 2024; and

**WHEREAS**, the Council approved 2024-2025 Accommodation and Hospitality Appropriations budget for;

**WHEREAS**, the County administration and staff have drafted the Beaufort County Local Accommodations and Local Hospitality Tax Grant Funding Policy “Exhibit A,” attached hereto and incorporated herein by reference, in order to address the needs and desires of the County.

**NOW, THEREFORE, BE IT RESOLVED** that Beaufort County Council hereby adopts Beaufort County Local Accommodations and Local Hospitality Tax Grant Funding Policy provided in Exhibit A, attached hereto and incorporated herein by reference.

This Resolution shall be effective upon approval by County Council.

Dated this 14<sup>th</sup> day of October 2024.

COUNTY COUNCIL OF BEAUFORT COUNTY

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Joseph Passiment, Chairman

ATTEST:

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Sarah W. Brock, Clerk to Council

## **Exhibit A**

### **Beaufort County**

#### **LOCAL ACCOMMODATIONS TAX (ATAX) AND LOCAL HOSPITALITY TAX (HTAX) GRANT FUNDING POLICY**

County tourism and promotion grants are funded through ATAX and HTAX revenues collected in unincorporated areas within Beaufort County. These funds may be used for tourism related events and programs in Beaufort County, with a priority of funding for those areas where the ATAX and HTAX funds are collected within unincorporated Beaufort County.

On March 11, 2002, Beaufort County passed an ordinance establishing a three percent (3%) tax on the rental of all transient accommodations in unincorporated areas of Beaufort County (Ordinance 2002/11). On March 28, 2005, Beaufort County passed an ordinance establishing a two percent (2%) tax on all prepared food and beverages sold in unincorporated areas of Beaufort County (Ordinance 2005/9). The proceeds from this tax are to be used for the dedicated purpose of promoting tourism in Beaufort County. The County's Grant Award program is a competitive grant program that provides ATAX and HTAX funds to eligible organizations for eligible uses.

#### **GRANT ALLOCATION REQUIREMENTS**

For the amounts distributed under the Local ATAX/HTAX grant award program, funds will be distributed with a goal of prioritizing awards to organizations and projects that generate tourism in the unincorporated areas of Beaufort County where ATAX and HTAX revenues are collected, and to a lesser degree, distributed funds for projects in the incorporated areas of Beaufort County (City of Beaufort, Town of Bluffton, Town of Port Royal, Hilton Head Island and Yemassee). These shall include:

- a. Organizations which are sponsoring projects or events in unincorporated Beaufort County where the county collects Local ATAX/HTAX revenues which attract tourists and overnight stays.
- b. Regional marketing organizations whose primary mission is to bring tourists to the region, including the unincorporated areas where the county collects ATAX/HTAX revenues.

#### **GRANT AWARD PROCESS**

Organization must submit an application to be considered for funding on the County's website on or before the published deadline. Applications are valid for the award cycle in which they are rendered. Once the deadline for applications has closed, applications received will be verified for eligibility by county staff and forwarded to the ATAX/HTAX Advisory Committee (Committee) for review.

Applications which are considered ineligible will be forwarded to the Advisory Committee with an explanation of the ineligibility justification.

## **THE A/H TAX ADVISORY COMMITTEE**

### **Advisory Committee shall comprise:**

- 1 staff member for Beaufort County Finance Department
- 1 Executive Staff member – (County Administrator or designee)
- 1 member of the State A-Tax Committee Board
- 4 members of the public as selected via an application process.
  - At least one member of the public group should represent the hospitality industry, and one member should represent the accommodations industry.
- 1 Member of County Council Finance Committee as Council Liaison (non -voting)

The advisory committee will be considered to have a quorum when at least 5 of the 7 voting members are present.

Applicants may be requested to participate in an interview with the Committee. Applicants will be expected to deliver a five (5) minute presentation on their program, clearly justify the request, and answers any questions the Committee may have.

The Committee will review and score each application based on the evaluation measures described below. Applications will be scored independently by committee members and ranked based on scores. Funding recommendations will be considered based on the funding available, the projects value based on evaluation criteria, assessment of fiscal need, and compliance with past award required reporting. The Advisory Committee will make funding recommendations to the Beaufort County Finance Committee for consideration, which upon approval will forward to Beaufort County Council for approval.

## **FUNDING PRIORITIES**

Priority will be given to projects that demonstrate a benefit to unincorporated Beaufort County or regional marketing efforts that draw tourists to the area, especially those areas where Beaufort County collects accommodations and hospitality taxes and projects which:

1. Generate overnight stays in unincorporated Beaufort County's lodging facilities
2. promote and highlight Beaufort County's historic and cultural venues, recreational facilities and events and the uniqueness and flavor of the local community.
3. Promote dining at restaurants, cafeterias, and other eating and drinking establishments in Beaufort County where the county collects hospitality tax.

## **APPLICATION EVALUATION**



The Advisory Committee will use the following evaluation criteria to evaluate applications. The following factors should be included as elements in of each application and the degree to which as these will be the degree to which your project contributes to tourism in Beaufort County's tourism. The factors include:

Thoroughness of Proposal: 0 - 10 points

All required forms and criteria are complete and submitted on time. Responses are clear and complete. Budget is complete. Required supporting documentation is provided.

Unincorporated Incorporated Goal (10 Points Unincorporated, 0-points Incorporated)

1. Does the project/event promote tourism in the areas of unincorporated Beaufort County where the accommodations and hospitality taxes are collected?

Benefit to Tourism: 0 - 10 Points

1. Will it promote a positive image for Beaufort County?
2. Will it attract visitors, build new audiences, and encourage tourism expansion in areas where the taxes are collected?
3. Will it increase the awareness of the county's amenities, history, facilities, and natural environment?

Benefit to Community: 0 – 10 points

1. Does this project benefit the citizens of Beaufort County? Will the project/event benefit the unincorporated Beaufort County?
2. Who will attend the event?
3. How many visitors will the event serve?

Innovation: 0 – 10 points

1. Is this project unusual or unique?
2. Will it bring new tourism to Beaufort County?

Evidence in Partnerships: 0 – 10 points

1. What kind and degree of partnership does the project exhibit?
2. Does it exhibit volunteer involvement or interjurisdictional, corporate, business, and/or civic support?

Management Capability: 0 – 10 points

1. Does the applicant organization demonstrate an ability to successfully complete the project through effective business practices in the area of finance, administration, marketing, and production?
2. If this organization has received County A/H-Tax funding previously, was the project successful?

**Economic Impact & Accountability:**

Reliable Tracking Mechanism: 0 – 10 points

1. Does the application include or describe a mechanism to conduct surveys, track ticket sales, or collect other data?

Expected Revenue Generation: 0-10 points

1. What are the projected direct and indirect dollar expenditures by visitors/tourist?  
What is the estimated number of meals consumed?
2. What are the estimated overnight stays anticipated?

Reasonable Cost/Benefit Ratio: 0-10 points

1. Does the benefit of the project/event (i.e. number of tourists estimated; expected revenue generated) exceed the cost of the project?  
(expected return on investment)

#### **GRANT AWARD TIMELINE**

Request for applications	1/1
Application due date	4/31
Committee meeting & application presentations	June
Grant Award notifications	Aug
Progress reports due	Quarterly after award date
Final reports due prior	At end of Period of Performance to final reimbursement

#### **GRANT AWARD PERIOD OF PERFORMANCE**

Capital project or construction requests may be awarded up to 24 months from the date of award to complete projects. Events and non-capital or construction progress will be granted 12 months from the date of award to complete projects. Award letters will specifically identify the dates of the period of performance. Organizations receiving grants must report to the Advisory Committee, in writing, activity and progress towards the purpose for which the award was granted quarterly.

Extensions of the period of performance must be requested in writing, submitted to the Advisory Committee as least 90 days prior to the award expiration date. Advisory Committee will consider the extension request and make a recommendation to the Beaufort County Finance Committee for consideration.

## ORGANIZATION ELIGIBILITY REQUIREMENTS

- Applicant organizations must have been in existence for at least one (1) year prior to requesting funds.
- Applicants must provide proof of their non-profit status.
- Beaufort County will not award funds to individuals, fraternities, or organizations for the purpose of supporting and/or endorse political campaigns.
- Religious organizations may receive funding; however, Beaufort County may not sponsor nor provide financial support to a religious organization in a manner which would actively involve it in a religious activity (i.e. public funds must not be used for a religious purpose).
- Grantee organizations may not re-grant County funds to other organizations. All funds must be spent on direct award expenditures by the organization that is granted the allocation.

## CRITERIA FOR PROJECT ELIGIBILITY

As required by the Local Accommodations and Hospitality Tax Ordinances 2024/13, 2024/15, projects must result in the attraction of tourists to Beaufort County.

**Per Beaufort County Code 66-44, projects must fall under one of the following to qualify for ATAX funds:**

1. Tourism-related buildings, including, but not limited to, civic centers, coliseums, and aquariums;
2. Tourism-related cultural, recreational, or historic facilities;
3. Beach access, renourishment, or other tourism-related lands and water access;
4. Highways, roads, streets, bridges and boat ramps providing access to tourist destinations;
5. Advertisements and promotions related to tourism development;
6. Water and sewer infrastructure to serve tourism-related demand;
7. Development of workforce housing, which must include programs to promote home ownership. However, the county may not expend or dedicate more than 15 percent of its annual local accommodations tax revenue for the purposes set forth in this item. The provisions of this item are no longer effective after December 31, 2030; and
8. The operation and maintenance of those items provided in (a)(1) through (a)(6) above, including police, fire protection, emergency medical services, and emergency-preparedness operations directly attendant to those facilities.

**Per Beaufort County Code 66-534, projects must fall under one of the following to qualify for HTAX funds:**

1. Tourism-related buildings, including, but not limited to, civic centers, coliseums, and aquariums;
2. Tourism-related cultural, recreational, or historic facilities;
3. Beach access and renourishment;
4. Highways, roads, streets, bridges and boat ramps providing access to tourist destinations;
5. Advertisements and promotions related to tourism development;
6. Water and sewer infrastructure to serve tourism-related demand;

7. Control and repair of flooding and drainage within or on tourism-related lands or areas; or
8. Site preparation for items in this section including, but not limited to, demolition, repair, or construction.

All grant funds must be expended by the recipient organization. Re-granting or sub-granting of funds is not allowed.

Expenditures must be consistent with the application budget. Only goods and services that comply with the A&H-Tax Guidelines, Ordinances, and State Law are permitted. The budget should reflect in financial terms the actual cost of achieving the objectives of the project you propose in the application. A budget section is necessary for a complete application as stated above. The budget should reflect financially responsible and mindful decisions where applicants have done adequate research to find the most affordable and efficient options for product or service sourcing.

If applying the provisions of H-TAX subsection (7), then the revenues must be expended exclusively on public works projects designed to eliminate or mitigate the adverse effects of recurrent nuisance flooding, including that which is attributable to sea-level rise, or other recurrent flooding. Such adverse effects include road closures and other transportation disruptions, stormwater drainage issues, and compromised public infrastructure. The public works projects must be within or on tourism-related lands or areas. Revenues must not be used to pay claims or otherwise settle litigation that may arise from time to time due to the harmful impacts of nuisance or other flooding.

## **APPLICATION COMPONENTS**

The grant application must be submitted through the form located on the Beaufort County website.

Applications must be complete and accurate. Incomplete or inaccurate applications will be forwarded by Advisory Committee to County Council Finance Committee with a recommendation of “no award.”

Applicant/Organization information- Name of applicant, contact information, organization details, project name and funding request.

General Description - Describe the project (a) in its entirety, or at completion of the presently known ultimate stage, (b) and/or the portion, phase or section of the total project for which funding is being requested.

- Include a thorough, but concise description (who, what, when, where and why).
- Include information about innovative ideas, community support and partnerships.
- Describe coordination that has been completed or will be needed with other organizations. Whether they are engaged in similar activities or expected to be the beneficiary of said project.
- Provide a detailed budget for the event/project. Include a detail of all revenues and expenses associated with event/project.

Benefit to Tourism- How does your event promote and highlight unincorporated Beaufort County’s historical and cultural heritage/locations, recreational facilities/events, and uniqueness

of the local community? Describe how the project will impact tourism in unincorporated Beaufort County and include supporting evidence/data. How does this benefit the hospitality business within unincorporated Beaufort County?

Benefit to Community- Describe how your project will benefit the community and unincorporated Beaufort County, supported with data and historical records.

Previous Success/Organization History- Describe How your organization has successfully managed this project and/or similar projects in the past. Describe your organization's ability to manage this project.

Project Marketing Plan- Outline your marketing, advertising and promotional plans for this project. How will you track visitors and overnight stays? What methods are you using to track all visitors and count the number of tourists and residents that attend/participate in your project.

Organization Financials- Provide a copy of your organization's audited financial statements for the last two years. If not applicable, please provide profit-loss statements and balance sheets for the last two years.

## **BUDGET/ELIGIBLE EXPENDITURES**

The budget should reflect in financial terms the actual cost of achieving the objectives of the project.

## **STATEMENT OF ASSURANCES**

The application must be signed electronically by a representative of the organizations to denote that all information provided in this application is accurate and complete to the best of the applicant's knowledge and ability.

## **APPLICATION PACKAGE**

To be considered for funding, applicants must submit a complete application package for the A/H-Tax grant program to Beaufort County Finance Department. Complete applications include:

1. Complete and signed application form. The application form is available on the Beaufort County Finance website, under Local Accommodations and Hospitality Tax Grants.
  - Answer all questions and complete each section.
  - Electronic signature from organization's representative.
2. Required Attachments:
  - IRS Determination Letter
  - Detailed Project Budget
  - Specific Tourism Information
  - Detailed Marketing Plan
  - Audited Financials or accepted supplemental documentation.
3. Submitted with all documentation before announced deadline.

## **AWARD NOTIFICATION**

The grant manager will notify all applicant organizations of the funding outcome in writing when awarded by Beaufort County Council. The period of performance will be defined in the awards letter. Awards will be available for reimbursement on the dates specified on the award letter. Final reports for the previous fiscal year, if applicable, must be received before any new payments are released.

### **REIMBURSEMENT PROCEDURES**

The Local A&H-Tax grant is reimbursement based. The organization qualifies for reimbursement-based drawdowns after the notice of award has been transmitted. Project or event vendors will not be paid directly by Beaufort County. Organizations will be responsible for paying invoices directly to vendors. Grantees are responsible for requesting reimbursement from the county for performed work/services which have been paid-in-full. Invoices must be dated after the award date, but before the award expiration date as stated on the award letter. Reimbursement requests must include the Beaufort County reimbursement request form and documentation of paid invoices, including both detailed invoices and proof of payment. Exceptions will not be allowed. Failure to supply adequate documentation will result in delinquency and loss of funding, as well as possible ineligibility for grant application for the next year.

### **REPORTING REQUIREMENTS**

Beaufort County requires grantees to complete one (1) quarterly report each quarter, even if reimbursement funds are not being sought or no action towards the granted activity have taken place (1) final report once the project is complete and all funds have been received for the project/event. Grantees are required to submit proof of grant expenditure with each drawdown including detailed invoices and proof of payment additional to the progress report document.

### **GRANT ACKNOWLEDGEMENT**

Grantees must acknowledge the receipt of ATAX/HTAX funding by including the Beaufort County logo, or by stating that the funds were provided by Beaufort County. Each grantee will receive a copy of or a link to the reporting documents in their award packet.

### **FREEDOM OF INFORMATION ACT NOTICE**

Please be advised that all materials submitted for ATAX and HTAX funding are subject to disclosure based on the Freedom of Information Act (FOIA).

The South Carolina Freedom of Information Act (FOIA) defines a "public body" as any organization or corporation supported in whole or in part by public funds or expending public funds. Your organization's acceptance of public funds from Beaufort County, should any be awarded, may cause your organization to come within the meaning of a "public body" as defined by FOIA. S.C. Code Ann. § 30-4-10.

(Supp 2002). Accordingly, this is to advise you that by accepting public funds, your organization may be subject to the South Carolina Freedom of Information Act.

By submitting an application, organizations certify that it has reviewed and understands the above statement regarding FOIA. Your organization further certifies that it does not discriminate in any manner on the basis of race, color, national origin, age, sex, disability, religion or language, and that all funds that may be received by your organization from Beaufort County, South Carolina, will be solely used for the purposes



set forth in this application and will comply with all laws and statutes, including the South Carolina Code of Laws regarding Allocations of Accommodations Tax Revenues.

**CONTACT**

Brycen Campbell, Senior Accountant, [Brycen.Campbell@bcgov.net](mailto:Brycen.Campbell@bcgov.net)



# BEAUFORT COUNTY COUNCIL

## AGENDA ITEM SUMMARY

Item 4.

<b>ITEM TITLE:</b>
<b>RECOMMEND APPROVAL OF A RESOLUTION AUTHORIZING THE COUNTY ADMINISTRATOR TO ENTER INTO A FACILITY USE AGREEMENT WITH THE BEAUFORT COUNTY SCHOOL DISTRICT</b>
<b>MEETING NAME AND DATE:</b>
Finance, Administration & Economic Development Committee; September 23, 2024
<b>PRESENTER INFORMATION:</b>
Eric Brown; Director of Parks and Recreation 5 Minutes
<b>ITEM BACKGROUND:</b>
<b>PROJECT / ITEM NARRATIVE:</b>
Beaufort County ("County") has an established Beaufort County Parks and Recreation Program ("Parks and Recreation") with a goal to develop programs that enrich the lives of County citizens by providing exceptional, recreational and cultural programs and services. The Beaufort County School District ("District") promotes a well-administered and comprehensive athletic program that is believed to be essential to young people's overall development, and where its well-designed athletic program meets the needs of a diverse student population. The Parties desire to enter into a Facility Use Agreement in order to allow for the use of athletic fields owned by both Parties. This will provide a greater number of athletic fields resulting in the scheduling of practices and games at times which are beneficial to students and more accommodating to all citizens.
<b>FISCAL IMPACT:</b>
No financial impact.
<b>STAFF RECOMMENDATIONS TO COUNCIL:</b>
Staff recommends Council approve authorizing the Administrator to enter into a Facility Use Agreement with the Beaufort County School District.
<b>OPTIONS FOR COUNCIL MOTION:</b>
Motion to recommend approval or disapproval to County Council to authorize the County Administrator to enter into the Agreement. Move forward to Council.

**RESOLUTION 2024/\_\_\_\_\_****A RESOLUTION AUTHORIZING THE COUNTY ADMINISTRATOR TO ENTER INTO A FACILITY USE AGREEMENT WITH THE BEAUFORT COUNTY SCHOOL DISTRICT**

**WHEREAS**, Beaufort County (“County”) has an established Beaufort County Parks and Recreation Program (“Parks and Recreation”) with a goal to develop programs that enrich the lives of County citizens by providing exceptional, recreational and cultural programs and services;

**WHEREAS**, Parks and Recreation develops, oversee, and organizes recreational programs for the citizens of Beaufort County, including but not limited to, soccer, baseball, basketball, flag football and lacrosse. Each of these programs require the use of athletic facilities which are currently only owned and operated by the County;

**WHEREAS**, the Beaufort County School District (“District”) promotes a well-administered and comprehensive athletic program that is believed to be essential to young people’s overall development, and where its well-designed athletic program meets the needs of a diverse student population; and

**WHEREAS**, the County and District desire to enter into a Facility Use Agreement (“Agreement”), in order to establish a cooperative relationship where fields owned by either entity will be available for use and in accordance with terms substantially similar to the terms provided in Exhibit A, attached hereto and incorporated herein by reference: and

**WHEREAS**, the County and District have determined that by entering into the Agreement, each entity will have access to a greater number of athletic fields resulting in the scheduling of practices and games at times which are beneficial to students and more accommodating to all citizens; and

**WHEREAS**, Beaufort County Council finds that it is in the best interest of the citizens and residents of Beaufort County for the County Administrator to enter into a field use agreement with the Beaufort County School District.

**NOW, THEREFORE, BE IT ORDAINED** that Beaufort County Council, duly assembled, does hereby authorize the County Administrator to enter into a Facility Use Agreement with the Beaufort County School District which is attached as Exhibit A.

Adopted this \_\_\_\_ day of \_\_\_\_\_, 2024.

COUNTY COUNCIL OF BEAUFORT COUNTY

BY: \_\_\_\_\_  
Joseph Passiment, Chairman

ATTEST:

\_\_\_\_\_  
Sarah W. Brock, Clerk to Council

<b>EXHIBIT A</b>
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STATE OF SOUTH CAROLINA	)	
	)	FACILITY USE AGREEMENT
COUNTY OF BEAUFORT	)	

**THIS FACILITY USE AGREEMENT** (hereafter the "Agreement"), made as of this \_\_\_\_ day of \_\_\_\_\_ 2024 ("Effective Date"), by and between the **Beaufort County School District of Beaufort County**, South Carolina (hereafter the "District"), and **Beaufort County**, a political subdivision of the State of South Carolina for use by Beaufort County Department of Parks and Recreation (hereafter the "County"); collectively hereinafter referred to as the "Parties" and individually the "Party".

**WHEREAS**, the Parties have enjoyed a cooperative use of District and County athletic facilities covered under this Agreement for the mutual benefit of the Parties, and the greater Beaufort County community; and

**WHEREAS**, the Parties desire to continue to work cooperatively to maximize the use, community benefits, and economic return of these facilities for the students, citizens, and taxpayers; and

**WHEREAS**, the Parties desire to memorialize their agreement as to how the athletic facilities will be used cooperatively and in good faith, in the best interest of the people of the County and District.

**NOW THEREFORE**, in consideration of use of the Facilities and intending to be legally bound, the Parties agree as follows:

1. **Facilities.** This Agreement covers any athletic facility, field, or concession stand owned and operated by the District or the County ("Facility" or "Facilities"). For purposes of this Agreement, a Facility does not include any school building or any use of a school building other than parking lots, unless otherwise agreed upon in writing by the Parties; and does not include any building owned or operated by the County.
2. **Term.** The initial term of this Agreement shall cover a period of one (1) year, commencing on the Effective Date, unless terminated sooner pursuant to the provisions of this Agreement. The Parties shall have four (4) consecutive one-year options to renew for a maximum of five (5) years. The renewal terms will occur automatically unless a Party provides a thirty (30) day written notice prior to the expiration of the current term. Any term after the initial term described in this Agreement shall hereinafter be referred to as a "Renewal Term".
  - 2.1. *Renewal Exception.* A term shall not renew if either Party fails to supply satisfactory evidence of compliance with the criminal history and sexual offender registry checks required in Section 10.4 of this Agreement. Registry checks shall be made available if requested by either Party.
3. **General Agreement.** The Parties generally agree to apply the terms and conditions of this Agreement flexibly and reasonably in order to maximize the benefit to the public, and accommodation of the other. As cooperative governmental partners acting in benefit of public health, safety and welfare, each Party is expected to continue to make reasonable exceptions and modifications to accommodate the goals and needs of the other Party. The Parties agree that no fees will be charged to a Party for the use of any Facility with the only exception being if the use is for the purpose of hosting a tournament.

Either Party may deny use of a field based on unsuitable field conditions, fields undergoing restoration, or any time health, safety and welfare concerns exist.

4. **Priority of Use.** The District agrees that the County shall have priority use of its Facilities over any third party. The County agrees that the District shall have priority use of its Facilities over any third party. To ensure priority of use, the use of Facilities should be scheduled as far in advance as possible but no later than thirty (30) calendar days prior, or as otherwise provided by this Agreement, and all scheduling should be communicating through the Designees and in accordance with Section 5.

5. **Scheduling.**

- 5.1 *Scheduling Generally.* The Parties agree that requests for use of Facilities shall be sent through electronic mail as far in advance as possible but no later than thirty (30) calendar days prior to the requested date. If this is not possible, Designee shall be notified as soon as reasonably possible. Parties agree the each will provide a complete list of Facilities available for use and will provide an updated list if at any time changes are made to the list.

- 5.2 *Scheduling Exceptions.* No use of a District owned Facility may be scheduled during school hours without the District's prior written permission. The District reserves the right to reschedule use of its fields as needed for its postseason games. The Parties agree to work cooperatively to re-schedule make-up games at the first opportunity available, where the request for make-up games should be made as far in advance as possible.

- 5.3 *Designee, Communication and Notices.* Each Party shall appoint a designee ("Designee") and provide the other Party with said designee's contact information if different than the contact provided in Section 17. Each Designee shall be responsible for submitting written requests for use of Facilities, reviewing and approving requests of the other Party, and coordinating the use of all Facilities pursuant to the terms of this Agreement. All notices should be sent according to Section 17 unless different contact information has been provided; but in the case of electronic mail failure, any form of recorded actual notice will be acceptable. For purposes of this Section, any informal coordination must be confirmed by electronic mail to the respective Party. In the case of electronic mail failure, any form of recorded actual notice will be acceptable.

6. **Field Preparation and Use.** Each Party, through themselves or its Grounds Contractor, shall prepare the fields by dragging and lining prior to scheduled preseason, regular season and post season games or any other needs. The Parties agree that lining of fields are only required for games, not practices. Any damage done to the field or equipment caused by the respective Party or Grounds Contractor shall be repaired or replaced by the using Party.

The Parties agree that metal cleats will not be permitted to be worn during the use of portable mounds on any baseball or softball fields.

7. **Facility Utilities, Parking, Revenue and Fees.**

- 7.1 *Utilities.* The District shall pay utilities for Facilities owned by the District. The County shall pay utilities for Utilities owned by the County.

- 7.2 *Parking.* The Parties agree to make parking available when a Facility is being used by either Party. Parking shall be at no cost to the using Party. There shall be no charge to users, participants, citizens, or any other party when a County Facility is being used.

- 7.3 *Concessions.* The District has the right of first refusal to provide concessions at District owned

facilities. The County has the right of first refusal to provide concessions at County owned facilities. During times in which a Party is using Facilities that concessions are necessary, and the owner chooses not to provide concessions, the Party using the Facility can choose to provide concessions outside of the owner's concession Facility.

- 7.4 *Facility Rental.* Facilities may not be rented to a third party without prior written consent of both Parties, and the specific terms must be memorialized by a separate agreement.
- 7.5 *Facility Revenue.* Each Party will receive all revenues, including, but not limited to, gate admissions, broadcasting rights, and sponsorships from events scheduled by said Party. The aforementioned revenues may be used at the Party's discretion. There shall be no entry fees charged when using a County Facility.
- 7.6 *Fees and Charges.* Neither Party will be charged by the other for the use of Facilities. Neither Party will be charged for custodial services or supplies during the use of Facilities, with the exception of the custodial cost for the use of Facilities for tournaments. If a Facility is used for a tournament, then the Facility owner will provide custodial services and issue an invoice for cost of custodial services to the using Party within thirty (30) days of the scheduled use of the Facility.
- 7.7 *Security.* The Parties are required to provide security when recommended by law enforcement. The District will provide security when using County fields for school games and District events. A County staff member or District staff member will be required to be present at all times during use of Facilities.

- 8. **Required Training for Use.** The Parties agree that all coaches are required to be CPR/AED certified and receive training in the following: Heat Illness Prevention, Concussion in Sports, Sudden Cardiac Arrest, Protecting Students from Abuse, and Crowd Manager Training.

9. **Insurance & Liability.**

- 9.1 *Insurance.* Each Party shall provide the other Party with a Certificates of Insurance within ten (10) days of the execution of this Agreement. Each Party shall obtain insurance coverage including, but not limited to, General Liability Insurance and Sexual Molestation Coverage. The Parties agree that appropriate insurance maintained at all times and will notify the other Party if there is ever a change in insurance coverage.
- 9.2 *Liability.* To the furthest extent allowable by law, neither Party shall be liable for any claims, demands, expenses, liabilities and losses (including reasonable attorney's fees) which may arise out of any acts or failures to act by the other Party, its employee or agents, in connection with the performance of services pursuant to this Agreement.

10. **Access to District and County Property.**

- 10.1. The Parties acknowledge that the each of the Parties reserve the right to exclude from either Party's Facility or property, including but not limited to, any location which each Party intends to use, any person or person(s) whom the other Party reasonably believes poses a security risk to the health, welfare and safety of the occupants of the Facility, in accordance with the either Party's normal lawful authority, policies, practices, and control of its Facilities. Nothing in this Agreement in any way diminishes the authority of the other Party to manage and control its property, and access thereto, under South Carolina law.



- 10.2. Each Party agrees that its employees, agents, volunteers, and participants remain at all times subject to the other Party's lawful authority, policies, practices, and discretion with regard to matters of control and management of the Party's Facility, including but not limited to, both active and passive measures for the safety and security of Facilities or persons. Each Party accepts any inconvenience or interference caused by the rights reserved to the other Party in this paragraph.
- 10.3. Each Party agrees that the use of a Facility includes some ancillary uses of facilities and fixtures at the location, such as restrooms, access routes through buildings and grounds, parking, utilities, authorized fixtures and equipment at the location, and the like, provided however, each Party shall not make any ancillary use not reasonably necessary to support the use, and all ancillary use is subject to each of the Parties control or limit in each of the Parties sole discretion for any of the Party's Facility.
- 10.4. Prior to the effectiveness of the initial term of this Agreement, and thirty (30) days prior to any Renewal Term, the County shall provide the names of all County staff or volunteers who will be on District property to act on behalf of the County to carry out its use to the District's Director of Risk Management. The County staff and volunteers are required to complete a background check in a manner agreed upon by the Parties and as further described herein. The aforementioned background checks may be completed either (1) by the County whereby the County's background check must meet the District's requirements; or (2) by the District whereby the individual may complete the online Volunteer Background Check, to include National Sex Offender Registry clearance. If the District's background check process is used, then upon approval by the system, the County will receive an email of clearance and shall contact the District's Director of Risk Management for further directions. No County staff or volunteer shall engage with students or have access to District fields prior to completing the background check process. Failure to comply will result in legal action and immediate termination of this Agreement.
- 10.5. During use of a Facility, each Party assumes full and sole responsibility for the custody, care, and control of children participating in their program, and acknowledges that the other Party is not assuming any responsibility or liability for any harm while the children are in the other Party's custody, care, and control.
11. **Maintenance, Damage and Repair of Facilities.** Each Party shall keep the Facility in good order and repair, ordinary wear and tear excepted. Each Party shall promptly give notice to the other Party of any required repairs or unsafe conditions and that Party will be afforded a reasonable period of time to complete the same. Any repair or replacement resulting from damages to the Party's property, facilities, or equipment caused by, or because of the other Party's use of the Facilities, shall be reimbursed by the damaging Party for the actual cost of the repairs no later than thirty (30) calendar days after the damaging Party's receipt of the other Party's invoice. No modifications to either Party's Facility are allowed without prior written consent from the owning Party. No smoking or consumption of alcohol is allowed at a Facility at any time.
12. **Termination.** Either Party shall have the right to unilaterally terminate this Agreement upon thirty (30) calendar days' written notice to the other party. In such case, the obligations and responsibilities of each Party under this Agreement shall cease as of the effective date of termination. Either party also reserves the right, but assumes no duty, to immediately terminate this agreement if, in its discretion, it determines that the use appears to threaten health and/or safety of participants in the use or threatens the real or personal property of the District or County.
13. **Scope of this Agreement.** This Agreement incorporates any and all prior agreements, covenants, and

understandings between the Parties hereto concerning the subject matter hereof, and all such covenants, agreements and understandings have been merged into this agreement. No prior agreement or understandings, verbal or otherwise, of the Parties or their agents shall be valid or enforceable unless embodied in this Agreement.

14. **Nondiscrimination.** The Parties affirm the right of all individuals to be treated with respect and to be protected from intimidation, discrimination, physical harm, and/or harassment. The Parties are committed to nondiscrimination and equal opportunity for all students, parents/legal guardians, staff, visitors, applicants for admission and employment, personnel, and community members who participate or seek to participate in its educational programs or activities. Accordingly, the Parties do not discriminate against any individual on the basis of race, religion, gender, gender identity, sexual orientation, sex, pregnancy, childbirth, or any related medical conditions, color, physical or mental disability, age (40 or older), ancestry, genetic information, national origin, or any other applicable status protected by Title VI, Title VII, Title IX or any other local, state, or federal law.
15. **Amendment.** No course of dealing, course of performance, oral statement, or other act of either Party shall be, or be construed to be, a modification or amendment of the written terms of this Agreement. Neither Party shall not act in reliance upon any representation, act or failure to act on the part of the other Party, which is inconsistent with the written terms of this Agreement. Amendments to this Agreement and the standard requirements implementing as developed and established by the Superintendent or County Administrator to implement any amendment to this Agreement shall take effect immediately upon written notice to the other Party, or thirty (30) days, whichever occurs first.
16. **Severability.** If any term or clause in this Agreement is illegal under either federal or state law, the remainder of the Agreement not affected by such ruling shall remain in force.
17. **Notice.** Any notice required to be given pursuant to the terms of this Agreement shall be in writing and shall be hand-delivered or sent by certified mail to the parties hereto. A Party shall promptly notify the other Party of any new Designee or Representative's name, title and of any change in the below contact information. Notice sent to a Designee or Representative shall bind the receiving Party.

*To the District:*

Beaufort County School District  
Dr. Carlos Cave  
Email: carlos.cave@beaufort.k12.sc.us  
Phone:

*Copy to:*

ATTN: FACILITY USE AGREEMENT  
Office of the Superintendent  
Beaufort County School District  
P.O. Drawer 309  
Beaufort, South Carolina 29901-0309

*To the County:*

Beaufort County Parks and Recreation Director  
Attn: Eric Brown  
Email: ebrown@bcgov.net  
Phone: 843-255-6684

*Copy to:*

Beaufort County Administration  
Attn: County Administrator  
P.O. Drawer 1228  
Beaufort, South Carolina 29901

**IN WITNESS WHEREOF**, we the duly authorized representatives of the Parties have entered into this Agreement as of the Effective Date.

**BEAUFORT COUNTY**

**BEAUFORT COUNTY  
SCHOOL DISTRICT**

BY: \_\_\_\_\_  
Michael R. Moore  
*Beaufort County Administrator*

BY: \_\_\_\_\_  
Frank J. Rodriguez, Ph.D.  
*Superintendent*



## BEAUFORT COUNTY COUNCIL AGENDA ITEM SUMMARY

Item 5.

<b>ITEM TITLE:</b>
<b>A RESOLUTION ADOPTING THE BEAUFORT COUNTY SOCIAL MEDIA POLICY</b>
<b>MEETING NAME AND DATE:</b>
Finance, Administration, and Economic Development Committee; September 23, 2024
<b>PRESENTER INFORMATION:</b>
Hannah Nichols, Public Information Officer 10 minutes
<b>ITEM BACKGROUND:</b>
<b>PROJECT / ITEM NARRATIVE:</b>
There are approximately 25 social media pages across 10 departments currently being utilized by Beaufort County departments for public outreach and communication. While a policy is in place through the Beaufort County Employee Handbook to guide social media use on personal pages, no such guiding document is in use for County-run social media platforms. By implementing a Policy establishing best-practices and guiding principles our social media channels can strengthen our brand authenticity and improve communication with the public.
<b>FISCAL IMPACT:</b>
None
<b>STAFF RECOMMENDATIONS TO COUNCIL:</b>
Staff recommends approval.
<b>OPTIONS FOR COUNCIL MOTION:</b>
Motion to Disapprove Move forward to Council for Approval

**RESOLUTION 2024/ \_\_\_\_\_****A RESOLUTION ADOPTING THE BEAUFORT COUNTY SOCIAL MEDIA POLICY**

**WHEREAS**, the Beaufort County Council (“Council”) finds that it is in the best interest of Beaufort County (“County”) to implement a policy to establish standardized guiding practices for official social media platforms; and

**WHEREAS**, while there are policies within the Beaufort County Employee Handbook guiding personal social media use, there currently exists no such guidance for official County social media platforms used for public communication and outreach; and

**WHEREAS**, the Council recognizes that Beaufort County uses social media to share relevant content to educate, increase brand credibility, and broaden our reach among key audiences; and

**WHEREAS**, the County administration and staff have drafted the Beaufort County Social Media Policy provided in “Exhibit A”, attached hereto and incorporated herein by reference, in order to address the needs and desires of the County, its employees, and the public.

**NOW, THEREFORE, BE IT RESOLVED**, that Beaufort County Council hereby adopts the Beaufort County Social Media Policy provided in Exhibit A, attached hereto and incorporated herein by reference.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2024.

COUNTY COUNCIL OF BEAUFORT COUNTY

\_\_\_\_\_  
Joseph Passiment, Chairman

ATTEST:

\_\_\_\_\_  
Sarah W. Brock, Clerk to Council



# BEAUFORT COUNTY GOVERNMENT SOCIAL MEDIA POLICY

## TABLE OF CONTENTS

- Purpose
- Scope
- How Beaufort County Government Uses Social Media
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- Account Safety
- ADA Compliance Specifics
- New Account Creation
- External Content Approval
- Content Best Practices
- Crisis Communications





## PURPOSE

Beaufort County Government uses social media to share relevant content to educate, increase brand exposure, and broaden our reach among key audiences.

These supporting policies are intended to properly portray, promote and protect Beaufort County Council and Beaufort County Government employees, and to assist Beaufort County Government entities in effectively creating and managing social media accounts as well as maintaining and enforcing brand standards through the use of social media content.

Social media is the use of online tools and services that allow users to create and publish content while engaging in community discussions. Users with similar interests can interact in communities by sharing information and knowledge. Many social media sites, such as Facebook, Instagram, Twitter and LinkedIn can serve as personal profiles where users can post information about themselves. Social media also allows users to gain support, share information with friends, and increase existing networking circles.

Beaufort County Government uses social media to engage in conversations with residents, visitors and employees of Beaufort County, whether they are current/prospective residents, visitors, employees, neighbors or other constituents.



## SCOPE

This policy applies to all Beaufort County Council Members and Beaufort County Government staff and individuals who are employed by Beaufort County in any capacity. The policies also apply to other people (such as volunteers and appointees) who use internally managed Beaufort County Government computing resources.

This policy applies to all forms of social media, including, Facebook, Twitter, Instagram, YouTube, LinkedIn, Vimeo, podcasts, blogs, online comments, etc. This policy may apply to employees outside of work hours and while using personal accounts when the use of social media affects an individual's professional responsibilities, violates applicable law, or constitutes a violation of Beaufort County Government regulation or policy.

We have developed this guidebook to provide members of the Beaufort County Government community with best practices as well as the direction and proper usage of approved branded social media accounts.

This collection of policies, procedures and tools helps ensure that assets and accounts are secured, reputation risks are minimized, and compliance is maintained. However, due to the ever-changing landscape of social media, we expect this to be a guideline document, which may need to be adjusted over time. These policies do not attempt to name every current and emerging platform. Rather, they apply to those cited and any other online platform available and emerging, including social networking sites and sites with user-generated content. The goal is that you will use these tools to learn how to strategize effectively to ensure your social media channel is targeting the right audience effectively.

Like most other forms of communication, social media is most effective when it is rooted in strategy and collaboration. The platform on which a brand or organization communicates, or the form in which that communication takes place (video, gif, animation, or tweet), does not negate the need to have associated goals, thoughtful design and clear expectations for performance, accountability and value added. This playbook contains the governing strategy, best practice guidelines, tools and resources that will enable Beaufort County Government to streamline and strategize social media.



## HOW BEAUFORT COUNTY GOVERNMENT USES SOCIAL MEDIA

Beaufort County Government uses many channels of social media to communicate and build relationships with our current/prospective residents, visitors, employees, neighbors, and other constituents.

Social media allows us the unique opportunity to engage in community conversations by hearing what our audiences are saying by conversing with them on any given social media channel. Beaufort County Government encourages its employees to use social media as a means to connect with members of the Beaufort County community and key stakeholder audiences to foster thoughtful engagement and dialogue, through meaningful content, about the issues and events important to and impacting Beaufort County Government and its various communities.

Social media is no longer just about conversation and content; it's now an established collection of channels that can deliver valuable content to satisfy the needs of your target audience. As organic reach on social media is shrinking, paid social media allows for the segmentation of specific audiences to reach constituents effectively and efficiently.



## Organic Social

Organic social refers to the way in which a brand or user can utilize tools and social media platforms to build and interact with a social community by sharing posts and responding to comments for free. For example, using a scheduling tool like Meltwater or Sprout to schedule and publish tweets on Twitter is organic. You may pay for a license to use Hootsuite, but there is no charge from Twitter for publishing your tweets. Another example is posting directly from a social media channel and not boosting or promoting the post for it to reach a broader audience.

## Paid Social

Paid social media allows users to utilize those same tools and social media platforms but instead, a brand or user could pay to boost or promote the content to increase engagement or increase reach. Paid social media allows your message to be delivered directly into the hands of your targeted audiences. Paid advertising on social media gives you complete control over who sees your content. Paid social media allows Beaufort County Government to target specific audiences and enable key stakeholders to take a desired action.



## Beaufort County Government Social Media Policies

When engaging in any social media activity as part of official duties for Beaufort County Government, employees are governed by the same policies that govern all other electronic communications.

Read the policies before engaging in any social media campaign as part of your official duties at Beaufort County Government and if you use social media for personal purposes.

These policies and activities are applied: (1) during employment at or while conducting activities for Beaufort County Government or (2) as part of the employee's official duties.

Such employees/individuals must follow all applicable state, federal and local laws, with policies found in Government employee handbooks, and with the brand standards manual.

Any content that violates any of these or contains/leads to an individual's private or personal information is strictly prohibited and should not be posted by employees or others using the site. Violations must be reported immediately to Beaufort County Government Leadership or Human Resources.



## PROTECTED INFORMATION POLICIES RELATED OR CONNECTED TO SOCIAL MEDIA

This section applies to disclosure of protected information while engaging in social media.

### Acceptable subject matter/content:

As a Government Organization, Beaufort County respects freedom of speech and has certain obligations under the First Amendment and related laws. Posts on a typical, open social media site (i.e., the Beaufort County Government Facebook page) cannot be limited based on the content or viewpoint of the speech/expression, with the exception of posts that break laws or do not contain speech protected by the First Amendment (as one example, speech inciting imminent violence).

Other Beaufort County Government social media sites that are intended for specific subject matter rather than for general use should conspicuously contain an “About” section that includes the following statement: “This site is intended for discussion of {INSERT SUBJECT MATTER}. It is not a “traditional public forum” as that phrase is defined in applicable law interpreting the First Amendment. We welcome your opinions and encourage open discussion about the topics we post.

If we become aware of messages that contain advertising, are off-topic, infringe someone’s rights, or are violations of the law, we reserve the right to remove them.”

Notably, while such a disclaimer allows the Beaufort County Government to define a specific topic or subject matter to be discussed on an issue-specific social media page, it does not allow Beaufort County Government to delete, edit or censor posts based on the post’s viewpoint regarding that topic.





## HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT (HIPAA):

This federal law protects confidential medical records as specified by HIPAA: “The privacy rule protects all ‘individually identifiable health information’ held or transmitted by a covered entity or its business associate, in any form or media, whether electronic, paper or oral.”

- Examples of protected information include: “... the individual’s past, present or future physical or mental health condition, the provision of health care to the individual, or, the past, present or future payment for the provision of health care to the individual, and that identifies the individual or for which there is a reasonable basis to believe can be used to identify the individual.”

## FREEDOM OF INFORMATION ACT (FOIA):

Staff and representatives of Beaufort County Government should also be aware that, as a Government Organization we have even less expectations of confidentiality than a private entity. This is because we are subject to the S.C. Freedom of Information Act (FOIA).

This act specifically provides that all communications of a public agency or public employee are subject to public disclosure unless specifically exempted by the act. All County social media pages should be archived appropriately and in compliance with Freedom of Information Act requirements.

## COPYRIGHT AND FAIR USE:

Copyright, a form of intellectual property law, protects original works of authorship including literary, dramatic, musical and artistic works, such as poetry, novels, movies, songs, computer software and architecture.

Copyright does not protect facts, ideas, systems or methods of operation, although it may protect the way these things are expressed.

Fair use allows portions of certain works to be used without consent under specific situations; however, the safest course is always to get permission from the copyright owner before using copyrighted material.



## COPYRIGHT AND FAIR USE CONT...

- User-generated content can be obtained when the owner of a photo or video shares it with a Beaufort County Government social media account via message, mentions the account's handle, uses a hashtag promoted by the account, or mentions the department, group, unit or initiative represented by the account. Social media users who engage in such actions allow Beaufort County Government to use their content on its various social channels. Effort will be made to credit the original source when posting user-generated content.

## ACCESSIBILITY (ADA)\*:

To ensure a positive user experience on our social media platforms, account managers should be aware of best practices that promote disability access and inclusion. These tools will help you make sure the images, videos and other content you share are accessible to people with disabilities. Since, in many cases, there are limitations to the accessibility of a platform, you should check its associated documentation to determine which of its features support accessibility. For a more detailed exploration of these topics via a tutorial, refer to the work at [exploreaccess.org](https://exploreaccess.org) via their Social Media Accessibility Toolkit.

## Accessibility Documentation by Platform:

- [Facebook Accessibility Support Features](#)

[https://www.facebook.com/help/273947702950567/?helpref=hc\\_fnav](https://www.facebook.com/help/273947702950567/?helpref=hc_fnav)

- [Twitter Accessibility Support Features: Images](#)

<https://help.twitter.com/en/using-twitter/picture-descriptions>

- [Instagram Accessibility Support Features: Images](#)

<https://help.instagram.com/503708446705527>

- [LinkedIn Accessibility Support Features](#)

<https://www.linkedin.com/accessibility>

- [YouTube \(Google\) Accessibility Support Features](#)

<https://about.google/belonging/disability-inclusion/product-accessibility/>

- [LinkedIn Accessibility Support Features](#)

<https://www.linkedin.com/accessibility>



\*Please see the accessibility section for best practices on how to comply on social media.

## BRAND AND COPYRIGHT COMPLIANCE

By having a social media presence, you must uphold the established Beaufort County Government visual and brand guidelines, and be mindful of copyright infringement.



# BEAUFORT COUNTY GOVERNMENT SOCIAL MEDIA POLICIES

## ADVERTISING

Any potential sponsor/advertiser collaboration between Beaufort County Government and another party with a monetary value must be developed through Beaufort County Government Public Information Office. This also applies to a collaboration with any third party with or without an existing relationship with Beaufort County Government.

If a collaboration has been established through the Public Information Office, any use of advertising materials must be reviewed and approved by the Public Information Officer before an agreement is signed. Beaufort County Government Public Information Office reserves the right to decline sponsorship/advertising access and content be included in said agreement on including but not limited to any primary or departmental Beaufort County Government Social Media channels.

Unless entered into a formal agreement with the Beaufort County Government Public Information Office, advertising on behalf of external vendors is prohibited on Beaufort County Government website and social media channels.

## BUSINESS TRANSACTIONS

Beaufort County Government does not endorse or use any social network or media sharing service as a secure means of transaction for online business transactions or matters involving personal information. Beaufort County Government will not ask for, nor may an individual send, credit card or payment information, classified information, privileged information, private information or information subject to nondisclosure agreements via any social network.



# BEAUFORT COUNTY GOVERNMENT BRAND GUIDELINES

Any content that is created to live on your social channels needs to adhere to the overarching Beaufort County Government Brand Guidelines. Please review the Beaufort County Government brand guidelines document on Sharepoint prior to any content creation.

## BEAUFORT COUNTY GOVERNMENT SOCIAL MEDIA GUIDELINES

All content and community engagement on social media have the potential to impact the Beaufort County Government brand. Remember that you represent Beaufort County Government when utilizing social media channels in an official capacity. Please familiarize yourself with our visual standards when creating your department's social media profiles and posting content. Use only approved brand assets (logo, graphics and color), and follow Beaufort County Government brand guidelines. If you have questions about brand or editorial guidelines, contact the Public Information office.

## ADDITIONAL RESOURCES AND TIPS FOR SOCIAL MEDIA RELATED POLICIES

Beaufort County Government employees and representatives may mention their Government affiliation in the bio or about sections of personal social media accounts but are prohibited from using Government brand elements on those accounts in ways that violate branding guidelines, trademark policies or other Government policies. Even if you are using social media personally, you should be mindful that you may still be seen as a representative of Beaufort County Government. More information on personal social media use can be found in the Beaufort County Personnel Handbook.

Users must adhere to the terms and conditions specific to each social network platform and follow policies for the use of personally owned devices in the workplace at Beaufort County.



Employees whose official duties include social media monitoring, management or content must be familiar with the following additional policies before engaging in any official social media activity:

## PLATFORM SPECIFIC POLICIES

All social media sites, such as Facebook, have policies about how they will or will not use your content, what is and is not allowed, etc. Be sure to familiarize yourself with these policies before you launch your channel.

If you have any questions about social media best practices, or need guidance when problems or issues of concern arise, contact the Public Information office.

## Account Safety

### PASSWORDS

In an effort to further protect Beaufort County Government's digital identity and online reputation, and to strengthen the security related to Beaufort County Government's social media accounts, it is recommended that social media account managers update the passwords for all of your area accounts at least once a calendar quarter.

The password to the social media profiles that you manage for Beaufort County Government is the only protection available for these accounts — accounts that allow immediate communication with prospective and current residents, visitors, employees, vendors, media and other constituents. Protecting the security of these accounts is a very important part of ensuring they are not overtaken for malicious purposes.

All login information, including passwords for social media accounts associated with any branch of Beaufort County Government must be shared with the Public Information Officer, IT Department, and Records Management for both security and FOIA purposes. Ultimately, Beaufort County Government is responsible for the content that appears on these social media accounts, and must have administrative access to these accounts regardless of who created the account.





## Password Guidelines

A strong password is your best defense against cybercriminals. A good password is easy to remember but hard to guess. Here are some tips for creating a strong password:

### Consider a Passphrase

A passphrase is a sentence or sequence of case-sensitive words that can include spaces and punctuation. Choose a phrase that is easy for you to remember but difficult to guess.

Things like song lyrics or well-known sayings or slogans can be easy for cybercriminals to guess. Passphrases benefit from their length, making them more difficult to crack (we recommend a minimum length of 15 characters). Passphrases can also be a sentence of unlikely words, but make sure it's one you can remember. You can also take a phrase and turn it into a password by using the first letter of words and adding numbers with special characters. Also avoid using anything related to your personal information.

### Use a mix of letters, numbers and symbols

Mixing numbers, symbols, uppercase and lowercase letters makes your password more difficult to guess. The more characters you use, the more secure the password will be. Again: Make sure it's something you will remember. A strong password won't make any difference if you can't use it.

### Unique Account, Unique Password

Reusing passwords for multiple accounts means that if someone were to learn one of your passwords, they could in turn gain access to more of your data and information.



## Things to Avoid

- Using your username or any derivative.
- Using personal information easily obtained about you. Your name, your license plate, your pet, your phone number, etc.
- Any keyboard sequence, like qwerty or zxcvbn.
- Repeated phrases like “blah blah blah blah.”
- Revealing your password to anyone.
- Writing your password down.
- Using any example password you find, including one from this guide.
- If someone who has access to the account leaves Beaufort County Government, passwords should be changed immediately.
- Passwords should not be shared via email. When possible, share the password verbally with shared account managers.
- The email address associated with the account should be a @bcgov.net email account.



## ADA Compliance Specifics

### Alternative Text Descriptions for Images

When social media platforms or aggregation tools such as HootSuite allow for alternative text descriptions on images, you should provide them.

For best practices on authoring alternative text descriptions, refer to the alternative text description section of the 11 Key Accessibility Factors reference material. Such text descriptions of images will be read aloud to non-sighted or low-sighted users who rely on screen readers to consume social media content.

## Hyperlinks

In instances where you need to include a website link, please adhere to the following guidelines for each channel:

### Instagram

This platform does have the ability to include a URL in post copy, but it cannot hyperlink it. If you need to include a link, please include the language “Link in bio” within your post caption, then update your bio page with the necessary hyperlink.

### Facebook, LinkedIn and Twitter

These platforms support the use of hyperlinks. The standard practice is to include a link shortener to ensure that the character count is not maxed out on Twitter and fits within the post on Facebook and LinkedIn. The Communications Department can provide a short link through Bitly or similar for use on these platforms.



## Captioning of Videos

For video content, you should provide captions of the audio for the benefit of those without hearing, who are hard of hearing and who are non-native speakers. Captions can be either closed captions (where a user can turn them on and off) or open captions (where the text is embedded into the video and cannot be turned on or off). Each platform has their own process for uploading or adding captions to video content. To follow platform accessibility practices see Content Best Practices.

## Context for Animated GIFs

At this time, the animated GIF format has either very limited or no accessibility support on most social media platforms. This makes the animated GIF content difficult for individuals who rely on screen readers to perceive. Therefore, you should not rely solely on animated GIF content in a social media post. When using animated GIFs, confirm that the post can be understood through its text content alone.

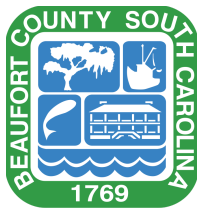
## CamelCase Hashtags

Hashtags are an important component of social media posts. When authoring hashtags that are made up of multiple words, use initial capitalization, also known as CamelCase. Utilizing this simple technique makes the hashtag easier to read for all users and is more consumable by screen readers since their synthesized voices can recognize and pronounce individual words and won't concatenate and garble them.

## Emojis and Emoticons

Emojis displayed on a screen will be described by a screen reader. The 🙌 emoji, for example, will be read aloud as "clapping hands." Please be considerate of screen reader users by using emojis judiciously and by placing spaces between them.

When creating emoticons with text, consider the experience for screen reader users. In this example, this visual experience of "shruggie" 🙄 will be read aloud by a screen reader as: "Macron, backslash, underline, katakana, underline, slash, macron."



## Text on Images

Please refrain from adding text on top of any static image posts as these are not ADA compliant.  
\*For a full review of accessibility features per platform, refer to the Content Best Practices section.\*



## NEW ACCOUNT CREATIONS

A Beaufort County Government social media account is any registered account administered by an official Government unit on any social network used in support of the function or needs of that unit. Use of social media accounts must be conducted in a manner that is professional, protects the reputation and brand of Beaufort County Government, and is in compliance with Beaufort County policies.

Official accounts must be maintained by the official department and must use @bcgov.net email for administrative correspondence. It is recommended, as a security baseline, that all accounts use a generic @bcgov.net domain account as the page owner for each account.

All Government accounts must have a full-time appointed employee who is identified as being the responsible party for account maintenance and content. Ultimately the department head is responsible for all posted content.

Authorization to present a social media account as an official County Government activity must come from the office of Public Information.

Before creating any official social media account at Beaufort County Government, you must complete a "Social Media Account Request" from the office of Public Information.

This request must be approved by your department head before it will be evaluated by the Public Information office. You will then be contacted by a member of our social media team to discuss social media policies as well as strategy, goals, messaging and best practices.

All official social media accounts at Beaufort County Government — with the name and contact information for the account manager and account password/login information — must be registered and stored within the official database with the office of Public Information and with Records Management for oversight and FOIA archival purposes.

All new accounts must follow the naming convention of @bcgov and then the department/organization name. Please refrain from using other iterations of Beaufort County Government, such as @BFTGOV.





Before starting a new social media account, you should be able to answer the following questions:

### Who is the audience?

- Determine who you are trying to reach, why you are trying to reach them and where that audience lives on which social media platforms (for descriptions on the different platforms, see the Social Media Communications Plan section below).
- Determine how your messages will be targeted (i.e., promoted posts to a specific audience, different platforms for different audiences, etc.).
- What are the other ways that you are communicating with this audience?

### Why are you starting this account?

- Define the purpose for the new account.
- Determine what the goal is and how you will measure success.
- Define how this account will align with Beaufort County Government social media goals.

### Do you have the resources?

Managing a Government-affiliated social media presence requires frequent and consistent attention. If you don't have the time to devote, you may be quickly overwhelmed.

Work through these questions below:

1. How will you source your content to share out and post?
2. Who will be responsible for ensuring that content is being posted?
3. Who will review content to ensure it follows Beaufort County Government and platform guidelines?
4. Who will be responsible for community and crisis management?
5. How do you plan to build relationships and partner with other departments and units to work on content opportunities together?



## What makes your account unique?

Determine what your account offers that others don't, particularly within your unit.  
Are you duplicating messages?

- Define the messaging framework for your target audience and determine if it overlaps with another BCGOV account.
- Determine if partnering with another account can strengthen your message.

## How can account administrators be contacted?

If account admins (such as employees) change frequently, consider creating a generic email address to minimize the effort required for transitioning to a new account admin.

What are your peer institutions doing on social media?

Find and follow peer institutions/organizations on the specific platform you are interested in creating for your department/unit.

Analyze the content from your peers as a starting point for you to use in planning to reach those audiences and learn more about the content that they are creating.

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- Find and follow peer institutions/organizations on the specific platform you are interested in creating for your department/unit.
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## Social Media Policies

Upon approval to create a social media account, you must adhere to the Beaufort County Government policies and guidelines for naming conventions, logo use and other visual identity standards.



## EXISTING ACCOUNT COMPLIANCE

Account administrators must correct or modify Government social media accounts under their control, as directed by the office of Public Information and within this Social Media Policy Guidebook.

Failure to comply with the Government Social Media Policies could result in account termination.

You should only post on behalf of Beaufort County Government in an official capacity where you have been explicitly authorized to do so. You should only create an account in the name of a recognized Government entity if you are authorized to represent that entity.

Discuss with your supervisor whether you are empowered to respond directly to users and when you may need approval to respond or when you have questions about the appropriateness of content for posting. Take a moment to think about what you are posting before you hit the publish/post button.

1. It is the responsibility of the administrator of a social media account to actively monitor the social media account; content must be current and accurate.
2. Posting on behalf of Beaufort County Government, in addition to its various departments
3. Be responsible for your posts and remember that what you post is a reflection upon Beaufort County Government and you.
4. Somewhere on your site, it is encouraged that your audience should have a way to privately contact the site administrator. If this is not a built-in feature of the site you are maintaining, then you are encouraged to list or embed email contact information somewhere on your site. Contact the Office of Public Information with questions or comments.



## EXTERNAL CONTENT APPROVAL ON BEAUFORT COUNTY GOVERNMENT ACCOUNTS

Given that social media is viewed as an inexpensive alternative to paid advertising, there has been a rush by organizations to adopt social media as a way to reach their various audiences. Social media is, like websites, official Government communication, so standards have been established to provide for proper and secure usage.

Could this content raise privacy concerns? FERPA, HIPAA and public information law should all be taken into account when posting on social media, and you should be informed in applicable areas of information security before launching a site.

Story ideas and/or specific events that you feel meet the brand editorial and content guidelines for main Government social channels should be shared with the office of Public Information.

- You will be asked to provide story-specific information and details on how sharing this story and/or content helps enhance and elevate the brand presence on social media. To ensure proper project vetting and approval, please submit ideas four to six weeks before anticipated launch/live date. A member of the office of Public Information will contact you to confirm the project request, to ask any questions, and to determine the optimal schedule and next steps, should it be determined that content should be shared on Government channels.
- The Public Information Office may determine that content needs to be modified or changed before shared on any Government channel.

Before starting to submit a potential Government social media story idea, you should be able to answer the following questions:

### Who is the audience?

- Determine who you are trying to reach, why you are trying to reach them and where that audience lives on which social media platforms-wise (for descriptions on the different platforms, see the Social Media Communications Plan section below).



- Determine how your messages will be targeted (i.e., promoted posts to a specific audience, different platforms for different audiences, etc.).
- What are the other ways that you are communicating with this audience?

## INACTIVE ACCOUNTS

Social media accounts at Beaufort County Government must be continually updated and monitored. Accounts that have been deemed inactive or obsolete in terms of social media best practices may be subject to deactivation or deletion.

Deactivation and deletion will be carried out by contacting and working with the identified account administrator and/or the highest-ranking officer of the department.

Please note, since the office of Public Information requires compliance with the official Government account database, which includes login information, inactive accounts are subject to deletion if an account contact cannot be made.

## ACCOUNT MANAGEMENT

### Account Administrator Expectations

When overseeing social media accounts on behalf of Beaufort County Government, the account administrator will be responsible for ensuring the highest level of professionalism across all platforms.

1. The main account administrator must be a full-time BC GOV employee.
2. The main account administrator will be responsible for overseeing the posting of all of the content that is shared out from the platform.
3. When applicable, the account login credentials can be shared with a part-time employee, professional social media vendor or volunteer. This should be approved by the account administrator and provided to the Public Information team to have in the social account



database. With any change in staff or support, all passwords should be changed, and the office of Public Information should be notified.

4. Occasionally, the office of Public Information may host social media check-ins, and all account administrators will need to attend.



## Employee Succession Plan

As staff changes, many accounts remain dormant and the login credentials may be lost in transition. To combat dormant accounts, a succession plan is required to ensure the longevity of our Government accounts.

We recommend using this checklist to ensure a smooth transition:

- Two weeks prior to departure –
  - Discuss the departure details and the following steps with your supervisor.
  - Inform the office of Public Information
  - Audit all aspects of the accounts such as direct messages, billing, scheduled content, ads and analytics to ensure that there are no outstanding questions.
- One week prior to departure –
  - Remove the employee leaving from all administrative responsibilities.
  - Revoke access on Facebook Business Manager and any social media management tool such as Sprinklr, HootSuite or Socialbakers.
  - Require the employee to log out from all accounts and to remove the account from their saved credentials on all mobile devices.





## BEST PRACTICES

### Content Best Practices

This section will break down specific communication features across social media platforms as well as best practices per platform. By following these best practices, we can ensure that our content will provide value to our followers.

## Platform Communication Features

## Community Management

### Direct Messages

Direct messaging has become an extremely valuable feature used in social media to create a one-on-one conversation with our users. This feature acts as a customer service tool and provides us direct access to our users that no other feature is able to do.

Here are a few best practices when responding and handling direct messages from a Government branded account:

1. Check for direct messages daily.
  - a. Always respond to every message received. For response references, please see the Social Media Guidebook.
  - b. Responses should always be sent within a 24-hour window of receiving the message.
  - c. Negative messages could happen and more often than not, don't require a response. However, there are instances where action should be taken:



- i. If a user sends a message that ensues harm to themselves or another individual, contact Beaufort County Sheriff's Office.
- ii. If a user sends a message that involves the safety of any Beaufort County Government building, property or employee, contact Beaufort County Sheriff's Office and PIO.
- iii. If a user sends a message that could harm the reputation of Beaufort County Government, contact PIO.

## Comments, Mentions, Tagged Content

These are valuable features that allow you to engage with other users' content. Users have the ability to interact with your brand by commenting on your posts, mentioning you in their content, and tagging you in their photos/videos.

Here are a few tips on how to engage with users comments, mentions and tagged content:

1. Always like or reply back to comments that users left on your content. This will ensure them that you saw their comment and recognize their engagement.
  - a. If you feel compelled to do so, leave a comment that engages back with the user. If not, liking the comment will suffice.
  - b. If a user comments with an appropriate question, make sure that you answer them with a comment or message them directly.
2. When searching for mentions, take a look at your notifications. If people mentioned you in a comment, post or Story, you should receive a notification.
  - a. Make sure that you engage with the user if appropriate so that they have been acknowledged.
3. If you are tagged in content, you should receive a notification. If appropriate, like the content or leave a comment. Doing so will increase your engagement and strengthen your



brand loyalty.

- a. If you did not receive a notification, you can also take a look at your profile to see what images you have been tagged in.

## Account Engagement

### Account Tagging

Here are a few best practices when tagging other accounts from a Government branded account:

1. Only tag an account that is directly related to the content you are sharing.
2. Always tag the minimum number of accounts possible.
3. Do not tag several large accounts in the hopes that they will repost your content.
  - a. Always check to make sure that your posts have more white text than blue text when posting.
  - b. Large accounts are less likely to share your content if you tag several other accounts because it will look bad on their page.

### Hashtag Usage

Here are a few best practices when utilizing hashtags for a Government branded account:



1. Only use hashtags that are relevant to the brand. If you are unsure about a specific hashtag, simply search for it and research the type of content associated with it.
2. Never create your own or a new hashtag without consulting the Public Information Office first.
3. Always use capital letters to break up what you are trying to say. For example you should always use #BeaufortCounty and not #beaufortcounty. The platforms are not able to distinguish between upper and lowercase letters, so readability is the goal.
4. Avoid overusing hashtags. The quality of the hashtag being used is more important than the quantity being used. Always check to make sure that your posts have more white text than blue text when posting.

In certain instances, negative commentary could occur beyond just the platform's direct messages. In these instances, please see the section on Crisis Communication.\*



## Platform Best Practices

### Facebook

The main use of Facebook is to share images and videos, creating events, organic/paid opportunities, and the use of native links to enhance traffic back to our Beaufort County Government website.

The functionality of this platform allows us to build out a strong paid strategy leveraging a large audience with not only Facebook but also with an Instagram account as well. This tool can be used best when learning to understand our prospective residents and visitors, outreach opportunities and overall reputation.

### Image Size and Layout:

Standard Image and Video Size: 1080x1080px

Event Cover Image Size: 1920x1080px

Profile Photo Size: 180x180px

Cover Image and Video Size: 820x312px

### Post Cadence:

If sharing out content organically, 3–4 times per week.

If sharing out content as paid, dependent upon the campaign length.

### Event Creation:

The event page feature on Facebook is unique to their platform and is not available on other platforms. If you are creating an event with a co-host, please contact your co-host before creating. If they accept the request, the event will be visible on their event preview section.



If there is a co-hosting request with the Government, please contact the Office of Public Information before creating your event. We will review your event details to ensure that they are compliant with the tips listed above. We will make suggested changes before we accept the request to ensure that the promotion of the event will be successful.

### When creating an event, follow the tips below:

1. Use an image as the cover photo versus using an image with text for accessibility purposes.
2. Keep the title short and to the point. There is a character limit to ensure that your title is visible on a mobile device.
3. The event description should include all of the information about the event in an easy to read format. Always include a link at the bottom for any additional information that may be required.
4. Consistently post within the event to increase visibility.
5. When the event is created, it will show up on your timeline as well as the event section preview on your profile page. In addition, you can also share the event on your timeline to increase reach and awareness.

### Facebook Live:

1. If going live on Facebook is part of your social media strategy plan, sit down and build out a strategy of expectations during the livestream.
2. Map out your timing as far as who will be featured, what locations featured, what is in the background and surrounding areas, and identify anything that could interrupt your live stream.
3. Make sure that everyone being featured in the live stream is aware and has the correct talking points.
4. Ensure that your connectivity to WI-FI is secure and that you're able to access Facebook.
5. When showcasing and broadcasting a high-level Government event, consider working with the office of Public Information and Broadcasting to provide the technological capabilities needed to provide high quality content to your followers.
6. If showcasing an event that is on a smaller scale, collaborate with the Public Information Office to help provide technology and strategy options.



## Accessibility on Facebook:

When uploading content such as video or an image, it's important to think through the level of accessibility for all of your followers. When uploading an image or graphic, add alternative text that explains who is in the photo, where it was taken with what the graphic states.

All videos uploaded to Facebook must be captioned using an approved captioning service such as Rev, and the captions must be done by human services vs. AI technology for accuracy.

Rev: <https://www.rev.com>

Access Facebook's Privacy Policy here: <https://www.facebook.com/policy.php>





## Instagram

The primary use and function of Instagram is to showcase visually Government activities for our residents, visitors, employees, media and other constituents in Beaufort County. Instagram is used to upload images and videos to the feed that create a cohesive aesthetic for our profile. In addition to supporting the aesthetic, users can preview a behind-the-scenes look with less curated content utilizing Instagram Story content.

Instagram Story content shows an authentic story while still staying within our platform guidelines. This ephemeral content disappears after 24 hours after posting. If the content is a key pillar in your strategy, adding it to an Instagram Highlight on the profile account will allow it to live past the 24 hours. If you are creating an Instagram Highlight to showcase your Stories, please be sure to create a branded graphic that visually represents the content within the highlight.

IGTV content serves as long-form video content that can be viewed on Instagram. This content can live in two places: Instagram Feed and Instagram profile.

Instagram Reels serves as short-term video content that can be viewed on Instagram. This content can be viewed in the Instagram Feed and on a user's Instagram profile.

### Image Size and Layout:

Standard In-Feed Image and In-Feed Video Size: 864x1080px

Instagram Story Size (Video and Image): 1080x1920px

IGTV Size: 1080 x 1920 px

Profile Image Size: 110x110 px

### Post Cadence:

If sharing out content organically, one post per day is ideal.

If sharing out content as paid, it is dependent upon the campaign length.



### Accessibility on Instagram:

When uploading content such as video or an image, it's important to think through the level of accessibility for all of your followers. When uploading an image or graphic, add alternative text that explains who is in the photo, where it was taken and what the graphic states.

All videos uploaded to Instagram must be captioned using an approved captioning service such as Rev, and the captions must be done by human services vs. AI technology for accuracy. With Instagram, unlike Facebook, captions must be added in post production. You cannot add captions during the upload process.

Rev: <https://www.rev.com>

Access Instagram's Privacy Policy here: <https://help.instagram.com/402411646841720>



## Twitter

The primary use for Twitter is to drive conversations around our brand and engage in meaningful conversations that show us as a leader in key areas.

One of Twitter's main features is the hashtag functionality that allows users to search for specific keywords around topics/trending topics. This will bolster content to be seen by a wider audience. The second feature is the timeliness of content on Twitter. Twitter content can go viral in seconds or be lost amongst tweets within seconds. Creating a consistent and strong voice for your brand will allow your tweets to be seen by your audience.

The third feature is the character limit of a tweet. A composed tweet cannot contain more than a total of 280 characters. Twitter also has a campaign/paid component that allows users to promote tweets within a campaign. The functionality of Twitter allows you to promote toward a specific audience you create or serve ads to followers of a specific account.

### Image Size and Layout:

Standard Image and Video Size: 1080x1080px

Header Image Size: 1500x500px

Profile Image Size: 400x400px

Twitter Card Image Size: 800x320px

### Post Cadence:

If sharing out content organically, 1–2 times per day to optimize for reach and engagement.

### Accessibility on Twitter:



When uploading content such as video or an image, it's important to think through the level of accessibility for all of your followers. When uploading an image or graphic, add alternative text that explains who is in the photo, where it was taken and what the graphic states.

All videos uploaded to Twitter must be captioned using an approved captioning service such as Rev, and the captions must be done by human services vs. AI technology for accuracy. With Twitter, you can either add the captioning during post-production or you can upload an SRT caption file using [twitter.ads.com](https://twitter.ads.com).

Rev: <https://www.rev.com>

Access Twitter's Privacy Policy here: <https://twitter.com/en/privacy>



## YouTube

YouTube is a platform for long-form video content where an account owner can create playlists around certain topics. YouTube is one of the largest search engines on the internet and continues to lead in organic and paid views. Beaufort County Youtube content should be coordinated through the Broadcast department.

YouTube can be utilized to initiate multiple ad campaigns on their platform. These tools can be found here: ([youtube.com](https://youtube.com))

### Image Size and Layout:

Channel Profile Image: 800x800px

Video Upload Image: 1280x720px

Channel Cover Image: 2560x1440px

### Post Cadence:

If sharing out content organically, 1–3 times per week to optimize for reach and engagement.

### Accessibility on Youtube:

All videos uploaded to YouTube must be captioned using an approved captioning service such as Rev, and the captions must be done by human services vs. AI technology for accuracy. If the video thumbnail graphic includes text, then include a note in the description that explains the text used in the graphic.

Rev: <https://www.rev.com>

Access the YouTube Privacy Policy here:

<https://www.youtube.com/yt/about/policies/#community-guidelines>



## LinkedIn

LinkedIn is a professional platform used to connect brands, partnerships, company thought leaders and current/future employees. This platform can be used to engage with our current students, alumni and potential partnership opportunities.

The tone of LinkedIn is more serious and professional. The use of hashtags is encouraged by the platform as they have increased their discoverability features.

LinkedIn also has a series of ad features that can be utilized for a campaign. These tools can be found here: ([LinkedIn page](#))

### Image Size and Layout:

Profile Image Size: 300x300px

Cover Image Size: 1536x768px

Dynamic Ads Size: 100x100px

Sponsored Content Image Size: 1200x628px

Video size: 256x144px (minimum) to 4096x2304px (maximum)

Maximum Video Length: 10 Minutes

Access the LinkedIn Privacy Policy here: <https://www.linkedin.com/legal/privacy-policy>



## Restricted Social Media Platforms

Beaufort County prohibits the use of platforms for social media marketing that do not meet FOIA archival requirements or that pose a risk to the overall integrity of County IT systems and protected data. Beaufort County desires to limit any potential risk of compromised data through the usage of social media platforms. For reasons expressed by both the US Federal Government and the South Carolina Governor's Office, the following applications are not to be used for social media marketing purposes, and County employees may not have these apps installed on their County-provided devices, including cell phones and laptops:

- Tiktok
- Snapchat





## Podcasts

The purpose of starting a podcast is to support Brand Awareness. Podcasts offer a new audience that will garner new traffic to your social media platforms. This means your audience will grow, supporting the popularity of not only the podcast but the brand itself. Podcasts also support more storytelling opportunities, as it's easy to produce long-form content. Through this approach, you can support your partners via an interview style and build a personal connection with your audience. Podcasts for the Beaufort County brand should be coordinated through the Broadcasting Department.

### Best practices and considerations:

- 1) BE REALISTIC ABOUT TIME  
Creating and maintaining a quality podcast takes time. Prepping content, recording, editing and posting can eat up a whole lot more time than you might think.
- 2) CREATE A CONSISTENT PUBLISHING SCHEDULE  
Getting your podcast out there on a regular basis is hugely important to building a listener base. Create a schedule that you can realistically stick to., whether that's monthly, weekly or biweekly. Give your listeners something they can rely on.
- 3) DO A FEW TRIAL RUNS FIRST  
Do some testing to get your format, style, audio quality and banter down before unleashing your podcast. Have topics prepared for the first five episodes. Plan on launching with 3-5 finished episodes.
- 4) INVEST IN QUALITY MICROPHONES  
Equipment makes a difference. No matter how great your content, no one wants to listen to a podcast with poor audio quality.
- 5) BE PREPARED TO EDIT AND ADD PRODUCTION VALUE  
If you want to sound professional, you'll need to edit. Editing helps you smooth out the wrinkles and create a good flow. You'll also want to add production value, like intro and outro themes.



6) DO YOUR HOMEWORK ON PLATFORMS

Know what you have to do to get your podcast on Apple Podcasts, Spotify, Stitcher or any other sites where you want to publish or promote it. Do some online research. Having your podcast in Apple Podcasts is especially essential since it has a large audience of podcast listeners.

7) MAKE SURE YOU HAVE A FOCUS

Make sure you have a core theme or focus for your podcast. You can still talk about a variety of things, but they need to tie back to an overarching subject.

8) PROMOTE, PROMOTE, PROMOTE

Listeners will not automatically tune in. You have to actively work to drive listeners to each and every episode of your podcast. That means marketing and sharing it the same way you would blog posts or any other online content.

9) GO IN WITH A PLAN

Make sure you start with a strategy before you ever turn on a mic. Plot out on paper how you will record, edit, publish and promote your podcast. Break it down into specific steps and action items. This will save you a lot of time, effort, and stress in the long run—and give you the best chance at podcasting success.

### Key podcasting takeaways:

- Develop and test your format.
- Have a recording and publishing schedule.
- Have topics prepared for the first 4-5 episodes before you start.
- Know what you have to do to get your podcast on appropriate platforms.
- Account for editing and production time.
- Think about audio quality.
- Work to drive listeners to your podcast.



## CRISIS COMMUNICATIONS

There may come a time when a crisis occurs either directly on your page or at the brand level. In these instances, it may be necessary to engage the Public Information Office for direction or to go dark on your accounts until further action is provided.

Please see categories below and the outlined process. The official Social Media accounts for emergency notification are operated through the Public Information Office and Beaufort County Emergency Management Services.

### Government Property Safety: Immediate Threats Crisis Communication

These include any situations that could have a direct impact on the safety of our Beaufort County Government buildings or property. These situations will be led by the Beaufort County Sheriff's Office channels, with the Government Brand Channels following after to alert the public. In these situations, all other social channels are to go dark and not post regarding these situations.

During crisis or emergency situations, it is critical to make sure accurate information is being shared from as few channels as possible so the audience's feeds are not overwhelmed with conflicting information.

The safety of the County Government community relies on accurate and concise information during these situations. These channels should allow the Sheriff's Office to do the communicating.

These threats include but are not limited to:

- Bomb threat.
- Active shooter.
- Armed intruder.
- Gunshots reported.
- Abduction.



- Attempted sexual assault.
- Criminal offenses.
- Hate crimes.

## Immediate Infrastructure Threats Crisis Communication:

These include any weather or health related situations that need to be led by our Beaufort County Sheriff's Office channels. During these situations, the Sheriff's Office will take the lead on notifying the public.

Once they have done so, all other social channels are encouraged to repost from the Sheriff's Office channel to alert their respective audiences. If a department/ organization chooses to repost emergency notification information, they must repost all information related to the event.

Additionally, all questions or inquiries directed to the Sheriff's Office should not be answered by any accounts other than the Beaufort County Sheriff's Office.

These situations include:

- Hurricane warning
- Hurricane watch
- Tornado warning
- Tornado watch
- Lightning advisory
- Lightning warning
- Weather advisory
- Severe thunderstorm warning
- Earthquake
- Gas leak/hazardous materials spill/incident
- Flooding reported
- Flash flood watch
- Flash flood warning
- Winter storm watch
- Winter storm warning
- Pandemic illness/outbreak of serious illness
- Plane/aircraft crash or incident



## Immediate Threats:

These include any technical issues affecting Beaufort County Government. The Beaufort County Sheriff's Office Channels will lead the communication of these issues.

Once they have, all other social media channels are encouraged to repost the information from the Sheriff's Office Channel. Ensure once information is re-posted that all information related to that event is reposted and all inquiries for the Sheriff's Office should be answered by the Sheriff's Office.

These threats include:

- Government computer systems
- Power outages/restorations
- BCSO phone outage
- Fire reports
- Weather shelters

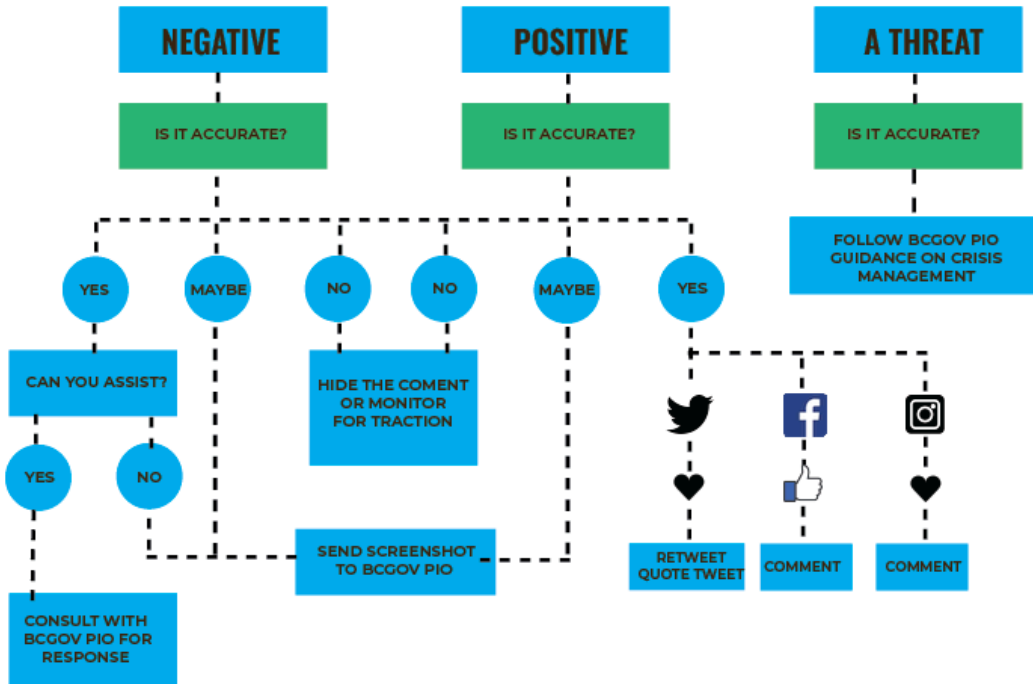
## Content Crisis Communications:

You may come across negative or disparaging posts or see third parties trying to spark negative conversations. These include any situation where there is negative, profane and/or threatening commentary on your personal page and/or a piece of content you post. Please follow these steps below:



# SOCIAL MEDIA RESPONSE GUIDE

IS THE SOCIAL POST OR COMMENT





## Press Inquiries

Postings may generate media coverage.

If a member of the media contacts you about a social media posting or requests information, contact the office of Public Information.

## Speaking “On Behalf of the Beaufort County Government Entity,” vs. “About Beaufort County”:

With the rise of Social Media use, individuals have the ability to share their opinions and engage in conversations about Beaufort County within their own networks.

An authorized spokesperson is a person who has undergone special training and is officially allowed to speak on behalf of the Government.

A social media user is an employee who participates on social media platforms and may or may not share information about Beaufort County Government.

While only an authorized spokesperson can speak ‘On Behalf of Beaufort County Government,’ any employee who is a social media user can speak “About Beaufort County.”

When engaging in conversations “About the Beaufort County,” please remember to add value to the conversation, follow all applicable policies and guidelines, and when in doubt, seek advice from the Public Information Office or don’t post.





# Social Media Work Plan & Account Request Form

## Instructions

This form should be completed by the Department's Social Media Coordinator, who is responsible for monitoring his/her Department's social media activity to ensure policy compliance.

The Department's Social Media Coordinator should have submitted a Social Media User Acknowledgement Form prior to submitting this form. Per Beaufort County Government's Social Media Policy, departments with social media sites should submit a separate workplan or face termination of future social media activities.

No new department social media account can be created without the submission and approval of a Department Work Plan by the Beaufort County Administrator's Office. Email completed forms to: [wpio@bcgov.net](mailto:wpio@bcgov.net). Final approved form will be emailed back to the Social Media Coordinator and Department Head.

## General Information:

Date

Department

Department Social Media Coordinator

Email

Has Department Head Approval been obtained (Required for Account Creation)?

## Workplan

Provide information regarding the current/desired social media platform:

Platform:

Current/Desired Profile Name:



URL (if applicable)

Date Established (if applicable)

1. What is the purpose of having a separate department site as opposed to posting to the Beaufort County Government's main account?
2. Who will be the authorized user(s) / department social media coordinator(s)? Indicate responsibilities (posting/monitoring/responding) if different between each platform/account. Indicate the primary contact, secondary contact and additional back-up.

Full Name:

Email:

Platform:

Responsibility:

3. What is the username? Who are the current and prior admins? (For Facebook, the department must add Beaufort County Government as a Facebook Admin with Full Control. This is used for monthly data gathering. Please review the Social Media Playbook on how to best manage your passwords.

Platform:

User Name/Login:

Registered Email:

Current Admin(s)

Person who Created Account

4. Do you want any of your department's GovDelivery topic to be linked and/or posted directly to your departments or County's Facebook/Twitter accounts? If so, which topic?

Platform:

GovDelivery Topic:

Platform:

GovDelivery Topic:

5. How will public inquiries/comments be handled?



6. What is your department's tolerance for negative criticism? (Refer to Social Media Playbook: Response Considerations for guidance. )
  7. What is your procedure to monitor activity and to ensure policy compliance?
  8. How frequently does your department plan to post content?
  9. What assistance, if any, do you need? Any other comments/questions?
- 

STOP: To be filed by Public Information Office:

Date Form Received:

Public Information Officer Approval Signature:

Date Approved:

Department Head Approval Signature

Date Approved:

Login Information / Access Received?

Training Conducted:

Notes:



## BEAUFORT COUNTY COUNCIL AGENDA ITEM SUMMARY

Item 6.

<b>ITEM TITLE:</b>
<b>RECOMMEND APPROVAL OF AN ORDINANCE ACCEPTING THE TRANSFER OF AUTHORITY FOR CONDUCTING MUNICIPAL ELECTIONS FROM THE TOWN OF PORT ROYAL TO THE BEAUFORT COUNTY BOARD OF VOTER REGISTRATION AND ELECTIONS</b>
<b>MEETING NAME AND DATE:</b>
Finance, Administration, and Economic Development, August 26, 2024
<b>PRESENTER INFORMATION:</b>
Marie Smalls Beaufort County Board of Voter Registration and Elections
<b>ITEM BACKGROUND:</b>
<p>State law (S.C. Code Sec. 5-15-145) allows municipalities to transfer authority for conducting municipal elections to County elections commissions. It also authorizes Counties to conduct municipal elections. As a condition of the transfer of authority to conduct elections, the governing bodies of the municipality and the County must agree to the terms of the transfer and enact ordinances embodying the terms of that agreement.</p> <p>The Town of Port Royal has worked with the Beaufort County Board of Voter Registration and Elections to agree on the terms of the transfer. Chief among the terms is that the Town of Port Royal shall reimburse Beaufort County for all costs incurred in conducting the municipal elections and protests. Town Council for the Town of Port Royal has adopted an ordinance embodying the terms of this agreement (Ordinance No 2024-13). The Board of Voter Registration and Elections presents the Town's ordinance, and an ordinance accepting the transfer, to County Council for its review, approval, and in support of Council adopting an ordinance embodying the same terms all as permitted by state law.</p>
<b>PROJECT / ITEM NARRATIVE:</b>
See above.
<b>FISCAL IMPACT:</b>
There will be no fiscal impact to the County. The Town of Port Royal is required to reimburse Beaufort County for all expenses incurred in conducting the municipal elections and any subsequent protests.
<b>STAFF RECOMMENDATIONS TO COUNCIL:</b>
Adoption of the Ordinance
<b>OPTIONS FOR COUNCIL MOTION:</b>

**Adopt the Ordinance as Presented, Deny the Ordinance, Modify the terms of the agreement.**

**ORDINANCE No. 2024/\_\_\_\_\_****AN ORDINANCE ACCEPTING TRANSFER OF THE CONDUCT OF MUNICIPAL ELECTIONS FROM THE TOWN OF PORT ROYAL TO THE BOARD OF VOTER REGISTRATION AND ELECTIONS OF BEAUFORT COUNTY**

WHEREAS, §5-15-145 of the South Carolina Code of Laws provides that municipalities are authorized to transfer by Ordinance authority for conducting municipal elections to the county elections commission; and

WHEREAS, §5-15-145 also provides that county elections commissions are authorized to conduct municipal elections; and

WHEREAS, §5-15-145 provides that the ordinance transferring such authority must state the terms of the agreement between the municipality and the County for such transfer of authority; and

WHEREAS, Town Council for the Town of Port Royal adopted an ordinance on July 10, 2024 (Ordinance 2024-13), which finds that it is in the best interest of the Town and its citizens to transfer the authority to conduct municipal elections to the Board of Voter Registration and Elections of Beaufort County; and

WHEREAS, pending approval of Beaufort County Council, the Board of Voter Registration and Elections of Beaufort County has agreed to accept the authority under the terms set forth below:

NOW, THEREFORE, BE IT ORDAINED by the Beaufort County Council, in meeting duly assembled, and by the authority of the same, as follows:

1. In accordance with the authority devolved by Section 5-15-145, Code of Laws of South Carolina, 1976 as amended, and pursuant to the terms of the Town of Port Royal's ("Town") ordinance adopted July 10, 2024 Beaufort County Council approves and accepts the complete transfer of authority to conduct all aspects of municipal elections for the Town to the Board of Voter Registration and Elections of Beaufort County ("Board"). The Board shall be completely responsible for municipal elections held within the Town. The authority hereby transferred includes, but is not limited to, addressing all disputes and questions that arise out of the election process, publishing proper notices of elections, insuring the provision of proper books for registration, preparing and distributing ballots and election materials, preparing and staffing the absentee ballot precinct, appointing and training poll managers, providing voting machines, supervising the operation of all polling places, to include enforcement authority to insure that proper procedures and laws are being followed, certifying the results of the election, reviewing decisions on challenges from candidates, reviewing decisions on challenged ballots, hearing protests filed or litigation commenced in connection with the conduct of a Town election. All elections conducted by the Board shall be in accordance with S.C. Code 1976, title 7, as amended, unless otherwise provided in or modified by S.C. Code 1976, Title 5, as amended.

2. The Town shall reimburse the Board for all costs incurred in providing ballots, advertising elections, printing costs, poll managers' compensation and all other additional expenses incurred in, or arising from, its conduct of municipal elections for the Town. Poll managers will be paid at the standard rate set by the South Carolina State Election Commission for all other elections.

3. In the event a protest is filed, or litigation is commenced, in connection with the conduct of municipal elections, the same shall be heard by the Board and defended by its attorney. The town shall pay all fees, costs, and expenses incurred in such protest or litigation, including, but not limited to, fees, costs and expenses of the board, its officers, agents and employees, and the officers, agents and employees of the county

4. The Board shall provide invoices and/or other documentation to the Town of all costs and expenses incurred in the conduct of municipal elections, protests, certification of results, litigation or other costs which may be incurred and reimbursed which are not specifically mentioned in this section.

5. If any provision of this section or its application to any circumstance is held by a court of competent jurisdiction to be invalid for any reason, this holding does not affect other provisions or applications of this section which can be given effect without the invalid provision or application, and to this end, the provisions of this section are severable.

6. This action shall take effect upon adoption of this section accepting the authority being transferred hereunder.

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Joseph Passiment, Chairman  
Beaufort County Council

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Sarah Brock,  
Clerk to Council

First Reading:\_\_\_\_\_

Second Reading:\_\_\_\_\_

Third Reading:\_\_\_\_\_



**Council**

Kevin Phillips  
Mayor

Mary Beth Heyward  
Mayor Pro Tempore

Jerry Ashmore  
Jorge Guerrero  
Darryl Owens



Van Willis  
Town Manager

T. Alan Beach  
Chief of Police

Jeffrey S. Coppinger  
Operations

Noah Krepps  
Planning

**ORDINANCE 2024 -13**

An Ordinance transferring the authority for conducting municipal elections to the county election commission, repealing Section 6-8 – Municipal Election Commission within Chapter 6 – Elections, and amending Section 6-9, 6-10, 6-11 Chapter 6 – Elections of the Town of Port Royal Code of Ordinances

**WHEREAS**, §5-15-145 of the South Carolina Code of Laws provides that municipalities are authorized to transfer by Ordinance authority for conducting municipal elections to the county elections commission; and,

**WHEREAS**, §5-15-145 also provides that the County elections commission is authorized to conduct municipal elections; and,

**WHEREAS**, §5-15-145 provides that the ordinance transferring such authority must state the terms of the agreement between the municipality and the County for such transfer of authority; and,

**WHEREAS**, Town Council for the Town of Port Royal finds that it is in the best interest of the Town and its citizens for the authority to conduct municipal elections to be transferred to the Board of Voter Registration and Elections of Beaufort County; and,

**WHEREAS**, pending approval of Beaufort County Council, the Board of Voter Registration and Elections of Beaufort County has agreed to this transfer of authority under the terms set forth below:

**NOW, THEREFORE, BE IT ORDAINED** by the Town Council of the Town of Port Royal, in council duly assembled, and by the authority of the same, as follows:

1. The authority for the conducting municipal elections in the Town of Port Royal is hereby transferred to the Board of Voter Registration and Elections of Beaufort County.
2. The Board of Voter Registration and Elections of Beaufort County (the Beaufort County Board) shall hereafter be empowered to conduct municipal elections in the Town of Port Royal in accordance with Title 7 of the South Carolina Code of Laws, and the Code of Ordinances for the Town of Port Royal. The Beaufort County Board will certify the results of each election to the municipality immediately following the certification of the votes cast in each election.
3. The Town of Port Royal Municipal Election Commission shall be abolished, and Section 1-8003 of the Town of Port Royal Code of Ordinances shall be repealed.
4. The Town of Port Royal shall reimburse the Board of Beaufort County for all costs incurred in providing ballots, advertising elections, printing costs, poll managers compensation and other

related additional expenses incurred in its conduct of municipal elections in the Town of Port Royal. Poll Managers will be paid at the standard rate set by the State Election Commission and, in addition to those rates paid by the State, shall include any additional stipends approved by Beaufort County Council. In the event a protest is filed, or litigation is commenced in connection with the conduct of municipal elections, the Town of Port Royal shall pay all fees, costs and expenses incurred in such protest or litigation. The Beaufort County Board shall provide invoices and/or other documentation to the Town of Port Royal of all such additional costs and expenses incurred in the conduct of Town of Port Royal Municipal Elections, protests, certifications of results, litigation or other costs which may be incurred, not specifically mentioned in this ordinance.

5. All ordinances or parts of ordinances inconsistent with this Ordinance are hereby repealed to the extent of inconsistency.
6. This Ordinance shall become finally binding upon adoption, and additionally upon the adoption of Beaufort County Council of an Ordinance accepting such transfer.



Kevin Phillips, Mayor



Lisa Graham, Town Clerk

Attest

First Reading 6/12/24  
 Second Reading and adoption 7/10/24

Approved in Form: Thomas A. Bendle, Jr.

## Beaufort County Boards & Commissions

### Parks and Recreation Board

RECOMMEND APPROVAL OF THE APPOINTMENT OF **ELIZABETH CAMPUTARO** TO THE PARKS AND RECREATION BOARD FOR A FOUR-YEAR TERM WITH THE EXPIRATION DATE OF SEPTEMBER 2028.

- ❖ APPROVED BY DALE BUTTS(ACA), SHANE STAGER (DEPUTY DIR), BRUCE YEAGER (BOARD CHAIR)
- ❖ DISTRICT 3
- ❖ TERM TO BE SERVED: 1<sup>ST</sup> - VOTE NEEDED: 6/11
- ❖ OCCUPATION: ATTORNEY (MOTLEY RICE)

### Lowcountry Regional Transportation Authority

RECOMMEND APPROVAL OF THE APPOINTMENT OF **JOHN HOLAK** TO THE LOWCOUNTRY REGIONAL TRANSPORTATION AUTHORITY FOR A PARTIAL TERM WITH THE EXPIRATION DATE OF FEBRUARY 2025.

- ❖ APPROVED BY MARY FRANZONI
- ❖ DISTRICT 8
- ❖ TERM TO BE SERVED: 1<sup>ST</sup> - VOTE NEEDED: 6/11
- ❖ OCCUPATION: ASSOCIATE VP/PROGRAM MANAGER (HNTB CORPORATION)

### Keep Beaufort County Beautiful Board

RECOMMEND APPROVAL OF THE APPOINTMENT OF **CONSTANCE HOPE CUNNINGHAM** TO THE KEEP BEAUFORT COUNTY BEAUTIFUL BOARD FOR A PARTIAL TERM WITH THE EXPIRATION DATE OF FEBRUARY 2026.

- ❖ APPROVED BY VICTORIA HOFFMAN (PROGRAM MRG), COUNCIL MEMBER HOWARD
- ❖ DISTRICT 4
- ❖ TERM TO BE SERVED: 1<sup>ST</sup> - VOTE NEEDED: 6/11
- ❖ OCCUPATION: FUND ADVISOR (FRIENDS OF CHERRY HILL OAK)

### Disabilities and Special Needs Board

RECOMMEND APPROVAL TO THE GOVERNORS OFFICE FOR THE APPOINTMENT OF **FAYE PATRICK ALSTON** TO THE DISABILITES AND SPECIAL NEEDS BOARD FOR A FOUR-YEAR TERM WITH THE EXPIRATION DATE OF SEPTEMBER 2028.

- ❖ APPROVED BY JANICE BEACH (STAFF LIAISON), LYNN RUSSO (BOARD CHAIR)
- ❖ DISTRICT 3
- ❖ TERM TO BE SERVED: 1<sup>ST</sup> - VOTE NEEDED: 6/11
- ❖ CENTER MANAGER (BJEOC HEAD START)