

Application for Swansboro Tourism Promotion Fund Assistance

The Swansboro Tourism Development Authority (STDA) is interested in assisting new events that bring revenue and overnight stays to strengthen and build Swansboro as a destination. While the STDA will carefully review every grant application each year, we strongly recommend that each applicant's goal should be to becoming self-sustaining.

Section 1. Applicant Information & Summary

Full Legal Name of Applicant Organization: *

Swansboro Historical Association, Inc.

Name of Event, Activity or Project to be Funded*

Swansboro Historic Homes Tour

Is Applicant a 501c3? *

Yes
 No

Is Applicant Tax Exempt? *

Yes
 No

Application Contact Person*

Amelia Dees-Killette

Title*

President, SHA

PO Box 1574

Mailing Address

City

Swansboro

State *

N.C.

Zip Code

28584

Primary Phone

910-467-5875

Alternate Phone

845-559-9691

Email Address

sahc502@gmail.com

Date or Dates of Activity or Project *

4/26/2024 - 4/27/2024

Amount Requested *

\$3000

Notes

Organization refers to the applicant or operating entity and the terms may be interchangeably used.

Activity is used to reflect a program, project, activity, festival, or event for which funding is being sought. The applicant may use any word that adequately describes their activity.

Dates: Because this application covers a time longer than one year, if your event occurs during July-August, please note whether it is schedule to occur twice and if so, please list the dates for both if available.

An attachment may be provided in lieu of using the space provided in the application. The **attachment must reference the specific section** being referenced, be in order behind the signature page and the section being answered in the attachment should be marked to indicate an attachment has been provided.

Only this application and approved attachments should be included in the submission.

Section 2. Organization Information

What is the purpose of the Organization?

Our mission is to encourage and promote public knowledge of, and interest in the history and culture of all the peoples of Swansboro, and its adjacent waterways, through education and preservation.

Please limit to 3 lines of text

Number of years organization has been in business

61

*See attachment for Section 2

Number of years organization has operated as IRS tax exempt

61

Does the Organization have a Board of Directors?

Yes

Describe the leadership of the Organization and how it relates to the activity. If a nonprofit such as a 501(c)3, describe the makeup of the Board of Directors and how the activity is administered. If another type of organization, describe the leadership of the activity and what if any, oversight others may have over that leadership.*

The organization leadership is all volunteer and includes a board, president, secretary, and treasurer. The board is made up of no less than 5 or more than 9 members. The president is a member of the board but cannot be the chairman of the board. The board votes on expenditures. The general membership elects the board and officers. By-laws changes are approved by the general membership. The board approves who will administer these funds.

Please limit to 4 lines

Section 3. Disclosure of Potential Conflict of Interest

Are any of the Board Members, employees, or staff of the organization that will be carrying out this activity, or members of their immediate families or their business associates:

Employees of the Town of Swansboro or related to an employee of the Town of Swansboro *

- Yes
 No

Members or related to members of Swansboro Tourism Development Authority? *

- Yes
 No

Potential beneficiaries of the activity for which funds are requested? *

- Yes
 No

Paid providers of goods or services to the activity or having other financial interest in the activity? *

- Yes
 No

Section 4. Organization Administrators All Volunteer

Chief Executive Officer

Chair of the Board-Dr. Gloria Sanders

Phone

910-330-4978

Email

onslowrehabcenter@yahoo.com

Note if any

Chief Financial Officer

Larry Philpott

Phone

910-322-4736

Email

lphilpott1@ec.rr.com

Note if any

Our treasurer is not a member of the board and is not required to be according to our by-laws.

Other Administrator

Dee Dee Bossart

Title

Co-Secretary

Phone

724-994-6779

Email

dbossart@gmail.com

Note if any

Co-Secretary: Cyndi Schachter

Section 5. Activity Administrators, if different

Primary Responsible Person

Amelia Dees-Killette-President of the SHA and board member

Phone

910-467-5875

Alternate Phone

910-467-6492

Email

swansborohistory@gmail.com

Note if any

Chief Financial Contact for matters related to this activity

Amelia Dees-Killette

Phone

910-467-5875

Email

swansborohistory@gmail.com

Note if any

alternate contact: Allyson Roberts 910-548-0439 allyson.roberts61@gmail.com

Any Other Administrator responsible for this activity

Title

Phone

Email

Note if any

Section 6. Nature of the Activity

What is the purpose of the activity?

To open the historic homes of Swansboro in order to share the history of the area so that all can have a better understanding of the history and background of Swansboro.

Is this a fundraiser for the organization? *

Yes

No

This does not disqualify the activity for funding

Is admission or a fee charged? *

Yes

No

What is the target audience for the event?

Tourists and visitors, potential SHA members from out of town, and the community at large.

Section 7. Organizational Capacity

Briefly describe the competency of the organization and staff to perform this activity and to provide responsible management. Has this organization or staff members been in direct leadership of this event or similar events before? If this activity has occurred in the last two years, please briefly summarize any organizational leadership changes as well as lessons learned/challenges from the event in those years and what the organization and/or staff intends to do differently to improve the activity in previous years.

The organization has managed the funding for marketing from the TDA in the past. We had a balance which went back into the fund in the summer of 2022. Hurricane Florence and the Covid 19 shutdowns interrupted our programs, including the homes tour and museum hours. We are requesting funds to assist us with bringing the popular historic homes tour back to the town. We feel that this event is for local community members and out of town guests as well. We know that other local towns showcase their history and downtown through a homes tour and feel as if this event is important for increasing tourism and highlighting the historical significance of Swansboro.

Section 8. Activity Information

Simply and clearly explain and describe the activity in sufficient detail so that the Authority knows what is to occur. Attach additional sheets, if necessary, but a concise narrative is highly desired. Report any contingency plans if the activity is weather dependent. Please attach and label as "Activity Information" and this section number.

The funding will go first for marketing the event to include posters, rack cards and advertising through local and statewide publications. Funding will also be used for signage at each home and printing tickets. In addition, funding will be used to help provide a thank-you reception for the home owners the evening prior to the tour. Without their hospitality and generosity in opening up their homes we could not have a homes tour.

Section 9. Activity Timeline Detail

Provide a Detailed timeline for the activity. Provide information on any organizational meetings, planning meetings or key milestones. Give specific information about when sponsor solicitation would occur, when promotion would begin, when funding might be needed from the Authority if approved and any contingency plans if the activity is weather dependent. If this event has occurred last year and was funded by the STDA please attached the actual detailed timeline from that activity The Authority is interested in evaluating when expenditures would need to be made, the time needed for lead-up expenditures to the event, and whether marketing is a blast type activity or something more institutional.

The marketing funds for posters, pamphlets, rack cards will be used beginning in January so that the event can be advertised in a timely manner. Signage will be purchased for outside each home that will be used the day of the event so that each home is clearly marked for visitors. The reception for homeowners will be held the night prior, April 26, 2024 at the Heritage Center. The committee for the homes tour has been meeting regularly and will meet monthly starting in December 2023 to ensure that the tour is advertised and organized to welcome local and out of town visitors for this popular event. The committee has already solicited a local artist to complete a painting of one of the homes to be used on our advertising. The committee is also actively recruiting a large group of volunteers to assist with ticketing and to act as docents in each home.

Section 10. Promotional & Marketing Activity

If the Activity has occurred in the past, describe the promotional or marketing activity that has been used. If the Activity has not yet occurred, describe the promotional activity that the organization seeks to have for the Activity.

The homes tour has not been held for several years due to the damage inflicted on the town from hurricane Florence and the shut down from COVID. However, in the past, we have used the website, posters, rack cards, and banners for marketing the the homes tour. We will also be marketing the tour in local and statewide media and publications.

Section 11. Summary of sources and amounts of funding for the activity for the past five years

If your activity does not have a past history, then only include the budget numbers for current FY.

What constitutes your fiscal year?

– See attachment for parts of sections 11, 12, and 13

State 5 years previous

Actual

State 4 years previous

Actual

State 3 years previous

Actual

State 2 years previous

Actual

State 1-year previous

Estimated

State Current

Budget

County 5 years previous

Actual

County 4 years previous

Actual

County 3 years previous

Actual

County 2 years previous

Actual

County 1-year previous

Estimated

County Current

Budget

Authority 5 years previous

Actual

Authority 4 years previous

Actual

Authority 3 years previous

Actual

Authority 2 years previous

Actual

Authority 1-year previous

Estimated

Authority Current

Budget

Other 5 years previous

Actual

Other 4 years previous

Actual

Other 3 years previous

Actual

Other 2 years previous

Actual

Other 1 year previous

Estimated

Other Current

Budget

Activity 5 years previous

Actual

Activity 4 years previous

Actual

Activity 3 years previous

Actual

Activity 2 years previous

Actual

Activity 1-year previous

Estimated

Activity Current

Budget

Total 5 years previous

Actual

Total 4 years previous

Actual

Total 3 years previous

Actual

Total 2 years previous

Actual

Total 1-year previous

Estimated

Total Current

Budget

Narrative

Our 501c3 non-profit funded some of the marketing and all of the online membership expenses for the last five years. Other funding came from the TDA but as noted above, 2018-2019 and 2020-2021 have limited expenditures due to a hurricane and a pandemic.

Describe any other funding being sought for current year from other entities including whether an application is being made to Onslow County Tourism:

None

Section 12. Summary of expenditures for the activity for the past five years. See attachment.

If your activity does not have a past history, then only include the budget numbers for current FY. These are broad categories and rounded estimates of expenditures can be used for each of the categories.

What constitutes your fiscal year?

–

5 years previous Salaries & Benefits

Actual

4 years previous Salaries & Benefits

Actual

3 years previous Salaries & Benefits

Actual

2 years previous Salaries & Benefits

Actual

1-year previous Salaries & Benefits

Estimated

Current Salaries & Benefits

Budget

5 years previous Promotion, Media, or Advertisements

Actual

4 years previous Promotion, Media, or Advertisements

Actual

3 years previous Promotion, Media, or Advertisements

Actual

2 years previous Promotion, Media, or Advertisements

Actual

1-year previous Promotion, Media or Advertisements

Estimated

Current Promotion, Media, or Advertisements

Budget

5 years previous Awards, Music, Performers, Art

Actual

4 years previous Awards, Music, Performers, Art

Actual

3 years previous Awards, Music, Performers, Art

Actual

2 years previous Awards, Music, Performers, Art

Actual

1-year previous Awards, Music, Performers, Art

Estimated

Current Awards, Music, Performers, Art

Budget

5 years previous Payments for lodging

Actual

4 years previous Payments for lodging

Actual

3 years previous Payments for lodging

Actual

2 years previous Payments for lodging

Actual

1 year previous Payments for lodging

Estimated

Current Payments for lodging

Budget

5 years previous Any Other Expenses

Actual

4 years previous Any Other Expenses

Actual

3 years previous Any Other Expenses

Actual

2 years previous Any Other Expenses

Actual

1 year previous Any Other Expenses

Estimated

Current Any Other Expenses

Budget

5 years previous Total

Actual

4 years previous Total

Actual

3 years previous Total

Actual

2 years previous Total

Actual

1-year previous Total

Estimated

Current Total

Budget

Narrative: Describe any other funding provided and give information that would help the Authority have a more complete understanding of this information.

All additional funding comes from membership dues for the Historical Association

Section 13. Activity Budget Detail

Provide a Detailed budget for the activity. Provide income, expenditures, and anticipated revenue (including how you would spend Authority Funds). For administrative grant provide total operating budget for the organization. An attachment such as a printout from a spreadsheet or the spreadsheet file is preferable.

See attachment

Please attach and label as "Detailed Budget" and this section number.

Section 14. Tourism Related Impacts

Please answer as completely as possible, but if you do not know, or it is undetermined, please state so. Unless otherwise stated, questions refer to the FY16 Activity as proposed.

Is the Activity an annual event or do you hope that it will be?

Annual (it has occurred twice)

Hoped to be Annual

One Time Activity

If checked, do you plan to become self-sustaining

Yes No

If this event has occurred in the last two years, list the actual numbers next to estimated numbers for the activity under the previous two fiscal years*.

*If funded by the TDA, this number should match your after-action report, or the report should be amended.

2 years previous Estimated Total Participants

Actual

1-year previous Estimated Total Participants

Actual

Current Estimated Total Participants

Estimated

Museum, programs, special events, school groups, etc. for the 2 years before Covid Shutdown 750-1,000 Potential total with funding 2,000-2,500 or more.

2 years previous Estimated Participants who travel more than 100 miles

Actual

1-year previous Estimated Participants who travel more than 100 miles

Actual

Current Estimated Participants who travel more than 100 miles

Estimated

Marketing should increase the numbers of people traveling over 100 miles.

2 years previous Estimated Overnight Stays for this Activity

Actual

1-year previous Estimated Overnight Stays for this Activity

Actual

Current Estimated Overnight Stays for this Activity

Estimated

2 years previous Organizational Paid Employees assigned to this Activity

Actual

1-year previous Organizational Paid Employees assigned to this Activity

Actual

Current Organizational Paid Employees assigned to this Activity

Estimated

No paid employees work for the SHA. It is all volunteer.

2 years previous Paid persons as a result of this Activity (Not ordinarily on payroll, hired only for this Activity)

Actual

1-year previous Paid persons as a result of this Activity (Not ordinarily on payroll, hired only for this Activity)

Actual

Current Paid persons as a result of this Activity (Not ordinarily on payroll, hired only for this Activity)

Estimated

NA

2 years previous Estimated volunteers to be involved in this Activity

Actual

1-year previous Estimated volunteers to be involved in this Activity

Actual

Current Estimated volunteers to be involved in this Activity

Estimated

The marketing funding, etc. administration will involve 2-5 people plus the SHA Board. All are volunteers. Graphic design, etc. will be a combination of SHA volunteers and paid private contractors.

2 years previous Estimated Value of Overnight Stays from Previous Activity*

*If funded by the TDA, this number should match your after-action report, or the report should be amended.

Section 15. Tourism Development Plan

A. Describe how the Activity will encourage persons to stay overnight in Swansboro lodging facilities.

The Swansboro Historical Association and the historic homes tour are a good investment for the Swansboro Tourism Development Authority. The homes tour is an extremely popular event in other local coastal towns and brings visitors from throughout the region to tour these homes. This tour will expose visitors to Swansboro and encourage return visits to the town and surrounding area.

B. Describe the other tourism related impacts of your activity to the Town of Swansboro.

While in town for the tour, visitors will likely visit local restaurants and shops, supporting local businesses and generating an interest for a return visit to Swansboro

C. Have any partnerships been made or are planned with Swansboro lodging facilities?

NA

D. If you used a formula for any tourism related actual totals or estimates, describe the methodology used to derive the estimate.

NA

Section 16. Volunteers

Does this Activity intend to use volunteers?

- Yes
- No

Section 17. Other Award Criteria Items

A. Does the Activity follow any of the goals adopted by Swansboro? This is not required but does add to the adopted criteria for consideration by the Authority. The goals are available by email or on the web.

See attachment for Section 17

B. Will the Activity be operated or performed in a manner that is consistent with standards for such activities?

C. Is there professional management or a demonstration of competence among the operators?

D. How does the involvement of the Authority or staff benefit this Activity?

Section 18. Certifications and Notices

Does the Organization agree to follow the financial guidelines of the Town of Swansboro, including no expenditures related to the grant before authorization? No payments will be made to the organization *

- Yes
- No

Does the Organization agree to adhere to other provisions and conditions described in the Instructions for this application? *

- Yes
- No

I certify that I am authorized to sign for the organization and that the information provided, including attachments, is true and correct to the best of my knowledge. I further certify that the organization I am signing for has reviewed and will accept the terms of the provided instructions if funding is approved.

Authorized Signer for Organization

Amelia Dees-Killette

I accept the conditions *

- Yes

* Indicates a required field

NOTES TO APPLICANT

- Applications may be submitted to:
Sonia Johnson, Finance Director
Town of Swansboro
601 W. Corbett Ave.
Swansboro, NC 28584
- A representative of the applicant will be required to attend the Authority meeting at which the application is to be considered.
- For consideration, an applicant must submit an application at least 30 days prior to the next scheduled quarterly TDA meeting and grant awards will be awarded up to \$2,000 unless by special exception by the TDA. Applications received after 30 days prior to the next scheduled meeting will be considered the following quarter.
- Funding is normally provided on a reimbursement basis, based on submission of proper documentation of expenses incurred.
- The applicant hereby acknowledges receipt of the STDA Outside Organization Funding Policy and agrees to comply with all requirements of that policy, including those related to performance contracts, final reports, and accountability for funds use.