

2024

Accommodations Tax Funds Request Application

Organization Name: Hilton Head Audubon Society

Project/Event Name: Hilton Head Audubon - 2024

Executive Summary

An ATAX Effectiveness Measurement form has been attached to this application.

2024 Accommodations Tax Funds Request Application

Date Received: 09/01/2023

Time Received: 10:23 AM

By: Online Submittal

Applications will not be accepted if submitted after 4 pm on September 1, 2023

A. SUMMARY OF GRANT REQUEST:

ORGANIZATION NAME: Hilton Head Audubon Society

Project/Event Name: Hilton Head Audubon - 2024

Contact Name: SARAH GUSTAFSON Title: Treasurer

Address: PO BOX 6185, Hilton Head Island, SC 29938

Email Address:
sarchrisgus@hotmail.com

Contact Phone: 703-479-0425

Event Date: Throughout 2024

Event Location: Audubon Newhall Preserve and HHI generally

Total Budget: \$25,600.00

Grant Requested: \$25,600.00

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

The grant is requested for four purposes which will enhance tourists' and visitors' experience at Audubon Newhall Preserve, a 50-acre nature preserve, and increase the number of people visiting Newhall and HHI: (1) construct a new welcome kiosk at Newhall that will upgrade visitors' initial introduction to the Preserve and provide more useful information, (2) expand social media interaction and advertising to attract more people to Newhall and to birding on the Island, (3) cover the cost of two larger events planned to attract eco-tourists, (4) reprint trail guides for visitors use at Newhall.

How does the organization/event either drive tourism to Hilton Head Island or enhance the visitor experience on Hilton Head Island? How is this impact being measured? (100 words or less)

HH Audubon maintains a website and Facebook pages providing relevant content, with visitors in mind, including imagery of lowcountry birds and lists of local/regional birding hotspots. Tourists interested in birding use our online presence to discover how special HHI is as a birding destination and to facilitate their birding experience while here. We perform website analytics to

track the number and location of site visitors.

With the ATAX grant we received last year, we generated our first Facebook advertising, for which we have performance analytics.

Through Newhall we provide visitors easy access to a native maritime forest ecosystem. We maintain a visitor log in which we tally visitors by location, and we recently added a people counter.

A. Total Number of Physical Tourists Served: 15725

A Tourist is considered a non-resident, traveling more than 50 miles to the Town of Hilton Head Island.

B. Total Number of Physical Visitors Served: 59

A Visitor is considered a non-resident, who travels 50 miles or less to visit the Town of Hilton Head Island.

C. Total Number of Physical Residents Served: 1775

A Resident is considered any person who claims their property address within the limits of the Town of Hilton Head Island as their primary residence.

D. Total Number of Physical Patrons Served (A+B+C=D): 17559

How was the Number of Visitors/Tourists Documented? (250 words or less)

The number of visitors/tourists includes people visiting Audubon Newhall Preserve, members of HH Audubon, and the people who we spoke with at two festivals HHA participated in this summer.

For Newhall Preserve, there is a visitor log where people may note their visitation. We capture the state they are from or whether they are a local resident. We have visitor log data for the past several years. In 2023, we added another mechanism to better determine the number of people visiting Newhall -- we installed a people counter, which counts the number of people walking past the welcome kiosk on the main trail. The people counter was installed effective June 1st, so we have a monthly people count for June and July 2023. We compared the visitor log sign-in totals to that of the people counter and found that 27% signed the log in June and 28% in July. We used these percentages to extrapolate the visitor sign-ins to derive the estimated number of people visiting Newhall, using the percentages of tourists vs. locals as documented in the visitor log. Documentation of our approach is included as an attachment in the Visitor Survey section.

For members of HH Audubon, we used their address per our membership database. We have 171 members who are HHI residents, 59 members in Bluffton, Beaufort etc. who are Visitors and 60 people who reside out of state.

Finally, HHA participated in two local festivals. In June, we were invited by Historic Mitchelville Freedom Park to have a presence at Juneteenth. We recorded 152 people who stopped by our visitor booth to talk with our volunteers, 91 were locals and 61 were tourists. We also participated in Outside Foundation's Keep the Broad Creek Clean festival and spoke with 78 people, 33 who were HHI residents and 45 were tourists. It was interesting that the vast majority of HHI residents at the Outside festival were new to the Island and came out to learn more about

what is available on HHI.

B. DESCRIPTION OF OPERATIONS:

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

Hilton Head Audubon is a leading voice for conservation on the Island and the surrounding Lowcountry working to preserve and protect wildlife and natural ecosystems and to encourage responsible environmental stewardship. Our goals include preservation and protection of our coastal marshes, beaches, maritime forests, and other habitats, ensuring they will be available for the continued enjoyment of residents and visitors, and for their use by migrating and resident birds. We actively partner with state and local leaders (conservation) and the community-at large (membership, communications) to promote a positive, forward-looking agenda for people and wildlife.

We are an all-volunteer membership-driven organization. We own and actively manage the Audubon Newhall Preserve, a 50-acre nature preserve on the south end of the Island. We conduct field trips and bird walks for members and visitors, run small-group educational meetings, conduct the annual Christmas Bird Count, publish a monthly on-line newsletter, maintain a dynamic website that provides resources for birding on the Island, and interact with community and government leaders on conservation issues such as preserving the red-headed woodpecker habitat in Mid-island Tract, the only known-breeding spot for this bird on the Island.

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

(1) Construct a new welcome kiosk at Newhall: \$15,000

The welcome kiosk provides visitors with their first glimpse of what Newhall has to offer. We currently have one bulletin board, crammed with information so we can fit it all in. To provide visitors with a better first impression, we'd like to increase the size of the kiosk to shelter three bulletin boards. With more space, we can provide better information, including an enlarged trail map, an explanation of what to look for in the Preserve, and a QR code for visitors to take a brief online survey.

(2) Expand social media interaction and advertising to attract more people to Newhall and to birding on the Island - \$6,800

Our foray into dedicated social media advertising, funded by our 2023 ATAX grant, began in April with an intern dedicating 5 hours/week to social media posts. Our Facebook Insights shows a 167% increase in the last 90 days (compared with the previous 90-day timespan), a great result. We'd like to double our effort, having an intern post 10

hours/week, \$400 monthly/12 months = \$4,800.

Targeted advertising on Facebook and Google to promote Newhall and birding on the Island to attract eco-tourists to the Island - \$2,000.

(3) Host two larger event to attract eco-tourists - \$700

In 2024, we're planning two birding related events with nationally known speakers. We intend to promote the events through Facebook and targeted advertising to tourists outside HHI. We're requesting \$700 to cover the event costs.

(4) Reprint trail guides for Newhall - \$3,100

In our 2023 ATAX grant we requested \$2,500 to print 10,000 trail guides. We purchased 6,000 guides for \$3,100. Due to the increased visitation to Newhall as well as our plan to ship guides to SC visitor centers, we need more guides. We've distributed 2,100 in five months.

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

Our grant request is ordered based upon our priorities. If we receive partial funding, we would fund our top priorities first. For our social media funding request, we could lessen the hours of paid intern or lessen the number of social media campaigns. If we received less funding for the trail maps, Audubon would fund the deficit with our own funds.

4. What is expected economic impact and benefit to the Island's tourism? *(100 words or less)*

Detail statistics of visitation are provided in the Documentation of Visitors/Tourists attachment included in the Visitor Survey section.

A 2015 study by the U.S. Fish & Wildlife Service showed \$15 billion spent annually on travel for birdwatching: \$4.5 billion for food, \$3 billion for lodging, and \$5 billion for transportation.

The Newhall preserve brings visitors from nearly every state and from several countries -- it is a destination for those who enjoy birding and nature.

By increasing our social media presence, we can bring more tourists to HHI and with enhancements to Newhall, we can ensure that they enjoy their visit.

5. In order to comply with the State's Tourism Expenditure Review Committee annual reporting requirements, **please classify your current grant request into the following authorized**

categories:

1 - Destination Advertising/Promotion <i>Advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity.</i>	100 %
2 - Tourism-Related Events <i>Promotion of the arts and cultural events.</i>	0 %
3 - Tourism-Related Facilities <i>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.</i>	0 %
4 - Tourism-Related Public Services <i>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 tourist. Also includes public facilities such as restrooms, dressing rooms, parks and parking lots.</i>	0 %
5 - Tourist Public Transportation <i>Tourist shuttle transportation.</i>	0 %
6 - Waterfront Erosion/Control/Repair <i>Control and repair of waterfront erosion.</i>	0 %
7 - Operation of Visitor Information Centers <i>Operating visitor information centers.</i>	0 %
Total:	100 %

6. If not covered elsewhere in the application, please describe (a) how the organization will collaborate with other organizations to enhance tourism efforts, and (b) provide a venue or service not otherwise available to visitors to the Town of Hilton Head Island. (250 words or less)

Establishing strong partnerships is necessary to enhance our credibility and effectiveness, achieve our policy goals, increase our visibility and grow our membership.

We have worked with The Coastal Discovery Museum to jointly develop education and conservation programs. We are working with the Town of Hilton Head to improve signage regarding birds on our beaches to educate tourists. We've developed education material for our local schools on shorebirds and backyard birding and regularly host school field trips to expose the students to the joys of birding. We've worked with the Women's Association of Hilton Head Island to host regular birding and nature walks for their members and guests.

This year through a grant from National Audubon, we partnered with Historic Mitchelville Freedom Park for Hilton Head Audubon to have a presence at their Juneteenth Celebration. Subsequently, we used the materials funded by National Audubon to have a tent at Outside Foundation's Keep Broad Creek Clean Festival where we spoke with 78 people, 58% who were visitors/tourists and most of the locals were new to the Island as their permanent home.

Also, this year, we received a small grant from National Audubon to run birdability tours.

We partnered with Friends of South Carolina Wildlife Refuges to conduct bird "walks" at Pinckney Island NWR using the Friends golf cart to transport people out to Ibis pond who would be unable to walk the one mile to reach the beautiful rookery of breeding birds.

Through the operation of Audubon Newhall Preserve, we provide tourists with a unique, accessible venue to experience the beautiful nature that HHI offers. Throughout the year, our volunteer members host weekly bird and nature walks so that tourists can get a personalized tour of the incredible Preserve.

7. Additional comments. (250 words or less)

C. FUNDING:

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

Hilton Head Audubon is primarily funded through membership dues and donations. We also generate some program revenue through field trips and special educational classes. We also receive a yearly allocation from National Audubon. In the past year we received grant funding from National Audubon for specific project needs.

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

<u> </u> Government Sources	<u>54</u> Private Contributions, Donations and Grants
<u> </u> Corporate Support, Sponsors	<u>39</u> Membership, Dues, Subscriptions
<u>7</u> Ticket Sales, or Sales and Services	<u> </u> Other

3. Has the organization requested other ATAX or any other funding from other public sources or organizations?

Yes No **X**

If so, please list top 3 sources and amounts.

D. FINANCIAL INFORMATION:

Fiscal Year Disclosure: Start Month: **May** End Month: **April**

Financial Statement Requirements:

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

Budget Provided: **Yes**

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

Current fiscal year Profit Loss Report Provided: **Yes**

Previous fiscal year Profit Loss Reports Provided:

FY23- Previous FY 1

FY22- Previous FY 2

3. The previous two fiscal years and current year-to-date **balance sheets**.

Current fiscal year Balance Sheet Provided: **Yes**

Previous fiscal year Balance Sheets Provided:

FYE 2023 - Previous FY 1

FYE 2022 - Previous FY 2

4. The previous two years and current year **IRS Form 990 or 990T**.

Current year IRS Form 990 or 990T Provided: **Yes**

Previous IRS Form 990 or 990T Years Provided:

2021 - Previous FY 1

2020 - Previous FY 2

E. FINANCIAL GUARANTEES AND PROCEDURES:

1. Provide a copy of the **official minutes** wherein the organization approves the submission of this application.

An official set of minutes have been attached to this application.

2. Indicate whether your organization follows Town procurement guidelines or has its own procurement guidelines which are utilized and followed in the expenditure of ATAX grant funds.

Follow Town procurement guidelines

Utilize and follow organization's own procurement guidelines

Our organization does not have or follow procurement guidelines

F. MEASURING EFFECTIVENESS:

If you received 2022 or 2023 HHI ATAX funds

1. List any ATAX award amounts received in 2022 and/or 2023.

2023	\$17,188.00	Audubon Newhall Preserve and Social Media
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2. How were the ATAX funds used? To what extent were the objectives achieved? The ATAX Effectiveness Measurement spreadsheet available in the application portal will show the numerics. Use the space below for verbal comments. (200 words or less)

As of August 27, 2023, we've spent \$14,104 of the ATAX awarded funds. We purchased 6,000 trail guides for Audubon Newhall Preserve. We distributed 2,100 of the guides in the five months since printing, so the trail guides have been extremely popular.

We also spent \$8,462 on four new interpretive signs which were installed on July 31, 2023. The new signs provide information about the types of pine trees in the Preserve, about alligators, and how nature differs on the Preserve between the day and night. In the one month since the signs were installed, we've received several positive comments in our Newhall visitor logbook. Both of these enhancements to Newhall have been extremely well-received. The number of visitors signing our visitor log from January to July 2023 is up 39% versus the same period for 2022.

For social media, we've spent \$200/month on an intern since April 1, 2023 for social media posting. We also spent \$688 to subscribe to a social media dashboard. Engagement with both our website and Facebook pages substantially increased. Tourists and visitors to Hilton Head Island use both sources to discover outdoor birding and nature destinations on the Island.

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

The availability of the ATAX funds allowed us to implement two longstanding projects on our wishlist for the betterment of Audubon Newhall Preserve. The 50-acre pristine nature preserve is a treasure for our Island. HH Audubon has a dedicated core group of volunteers that manage and maintain the Preserve -- weeding, mulching, planting trees and bushes to name just a few activities. They are very proud of the Preserve. Having the Town of Hilton Head share in their enthusiasm by funding enhancements to the Preserve further strengthens their pride and dedication to ensuring that the Preserve continues to be maintained at a high level so tourists and residents can continue to enjoy this Island treasure.

Additionally, the ATAX funds for social media allowed our communications team to get tools and resources so their volunteer efforts are more successful. This has bolstered their ability to achieve their goals of expanding HH Audubon's outreach to a larger, broader audience.

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

HH Audubon measures its effectiveness through the following two primary means:

- Number of members. During covid our membership went down significantly . We are trying to gain new members to re-establish our membership base. We currently have 290 members, whereas a year ago we were 195. As an all-volunteer organization we need members to do our important work.
- Number of Visitors to Audubon Newhall Preserve. The Preserve is maintained as a natural area for birds and wildlife, but also for humans to experience this unique natural area. The number of people visiting Newhall is a reflection of our effectiveness in managing and maintaining preserve. We had a 39% increase in the number of people signing into the Newhall visitor log from January to July 2023 vs. same period in 2022.

G. EXECUTIVE SUMMARY

Provide an executive summary using the "ATAX Effectiveness Measurement" form provided via the link on the left, or by utilizing the text area provided below to report uses of the organization's prior ATAX grant, if applicable. If creating your own format, please refer to the "ATAX Effectiveness Measurement" form and use the criteria as a guideline in developing your executive summary below. (1300 words or less)

An ATAX Effectiveness Measurement form has been attached to this application.

Signature: Sarah Gustafson

Title/Position: Board member, Treasurer

Mailing Address: PO BOX 6185, Hilton Head Island, SC 29938

Email Address: sarchrisgus@hotmail.com

Office Phone Number: 703-479-0425

Home Phone Number: 703-479-0425

**HILTON HEAD AUDUBON
DOCUMENTATION OF VISITORS/TOURISTS**

VISITOR LOG AT AUDUBON NEWHALL PRESERVE

HHA has a visitor log at the entrance of Audubon Newhall Preserve. The information below is summarized from the log. People are asked to indicate whether they are Local, and if not, provide the State they are from.

	January to July			August to December			January to December		
	Tourists	Local	Total	Tourists	Local	Total	Tourists	Local	Total
2021	1,438	29	1,467	1,024	19	1,043	2,462	48	2,510
as % jof total	58%	60%	58%	42%	40%	42%			
2022	2,068	54	2,122	1,044	73	1,117	3,112	127	3,239
as % jof total	66%	43%	66%	34%	57%	34%			
2023	2,701	257	2,958	1,655	158	1,813	4,356	415	4,771
as % jof total	62%	62%	62%	38%	38%	38%	<i>estimated/extrapolated for August to December</i>		

Remaining 2023 (August to December extrapolated based upon average of 2021 and 2022)
Average of visitors January to July 2021 and 2022 = 62% (58% and 66%) of year, so August to December = 38%

PEOPLE COUNTER

HHA installed a People Counter effective June 1, 2023 to get better data on the number of people visiting Newhall. The two months of data are very consistent with the number of people who signed the Visitor log (27% and 28% each month), so we've extrapolated the data from the sign in sheets based upon the sign-in %.

2023	June	July		January to December		
				Tourists	Local	Total
People counter	1,633	1,208	Estimated log sign-ins	4,356	415	4,771
Visitor log sign-in	446	336	Extrapolation factor	28%	28%	28%
Sign-in %	27%	28%	Estimated visitors	15,559	1,480	17,039

HILTON HEAD AUDUBON MEMBERSHIP

HHI Residents	171
Visitors	59
Tourists	60
Total members	290

HHA AT FESTIVALS

	Outside		Total
	Juneteenth	Water Fest	
HHI residents	91	33	124
Visitors	-	-	-
Tourists	61	45	106
Total	152	78	230

Information is based upon address of members

AGGREGATED PHYSICAL PATRONS SERVED

	Newhall	Members	Festivals	Total
HHI residents	1,480	171	124	1,775
Visitors		59		59
Tourists	15,559	60	106	15,725
Total	17,039	290	230	17,559

Hilton Head Audubon
Budget vs. Actuals: FY23 AND FY24 BUDGET

May 2022 - April 2023

	Total			FY24 Budget	Comments
	FY23 Actual	FY 23 Budget	Over/(Under)		
Revenue					
4010 Memberships	16,452	20,000	(3,548)	18,000	
4110 Donations	10,005	6,500	3,505	11,000	
4120 Fundraising	432		432	-	
4210 Educational Programs	468		468	-	
4310 Field Trips	1,785	3,000	(1,215)	2,000	
4420 Grants - Foundation	12,784	1,800	10,984	3,450	FY23 actual-\$11k National Audubon grants-cash recvd-expenses FY24
4430 Grants - Government			0	17,558	FY24 budget = FY23 ATAX funding reimbursed in FY24
4500 Miscellaneous Income	240		240	300	
Total Revenue	\$ 42,165	\$ 31,300	\$ 10,865	\$ 52,308	
Expenditures					
8110 Speakers, Presentations	625	1,150	(525)	1,000	
8120 Refreshments	607	250	357	200	
8130 Technology (Website,	4,776	4,500	276	6,500	
8131 Social Media Advertising			0	2,058	
8210 Interns	1,025	1,200	(175)	4,500	
8400 Acctng/Office Supplies	119	250	(131)	200	
8510 Rent (Storage)	1,776	1,800	(24)	1,800	
8520 Utilities	657	600	57	750	
8530 Rental (Space, Equip)	2,220	1,550	670	2,575	
8540 Equip, Repairs & Maint.	3,090	5,000	(1,910)	5,000	
8545 Special Projects	1,550	1,700	(150)	11,473	
8550 Signage	4,274	1,400	2,874	6,300	Newhall interpretative signs - ATAX funded
8555 Printing & Design	3,114		3,114	2,350	Newhall Trail guides - ATAX funded
8560 Postage, Shipping	470		470	500	
8570 Licenses, Fees	50	800	(750)	500	
8580 Taxes	812	750	62	900	
8610 Bank and Credit Card Fees	1,165	900	265	1,300	
8620 PO/Safety Deposit Boxes	60	350	(290)	200	
8710 Grants to other entities		4,000	(4,000)	3,000	FY24 \$2K to SC Audubon based upon FY21 commitment
8810 Insurance	1,891	1,950	(60)	1,925	
8890 Miscellaneous	33	1,100	(1,067)	-	
Total Expenditures	\$ 28,315	\$ 29,250	\$ (935)	\$ 53,031	
Revenue vs. Expenses	\$ 13,851	\$ 2,050	\$ 11,801	\$ (723)	
Cash balance at 4/30/2023			\$ 88,608		

	Actual FY23	Budget FY24	Net
ATAX - 2023			
Revenue	0	17,558	17,558
Expenses	7,313	10,245	17,558
Net	(7,313)	7,313	-
Audubon \$11k Grant			
Revenue	11,000	-	11,000
Expenses	677	10,323	11,000
Net	10,323	(10,323)	-
Impact per year	3,010	(3,010)	-

Hilton Head Audubon

Statement of Activity Comparison

May 1 - August 1, 2023

Cash Basis

	Total		
	May 1 - Aug 1, 2023	May 1 - Aug 1, 2022 (PY)	
Revenue			
4010 Memberships	4,040	740	
4110 Donations	2,350	2,918	
4310 Field Trips		144	
4420 Grants - Foundation	1,650		
4430 Grants - Government	7,387		ATAX receipts for 2023
4500 Miscellaneous Income	270	180	
Total Revenue	15,697	3,982	
Expenditures			
8030 Advertising	630		Facebook Advertising
8120 Refreshments	164	188	
8130 Technology (Website, Zoom)	2,357	445	
8210 Interns	1,925	853	
8510 Rent (Storage)	444	444	
8520 Utilities	158	154	
8530 Rental (Space, Equip)	(100)	50	Refund-deposit Island Rec
8540 Equipment, Repairs & Maintenance	253	774	
8545 Special Projects	7,405	728	CY - Juneteenth expenses
8560 Postage, Shipping	25		
8610 Bank and Credit Card Fees	178	137	
8620 PO & Safety Deposit Boxes	60	60	
8700 Dues & subscriptions	450		
8710 Grants to other entities	2,000		SC Audubon - prior commitment
8810 Insurance	1,924	1,891	
8890 Miscellaneous	3		
Communications	1,026		Hootsuite-managment of social media
Total Expenditures	18,901	5,726	
Excess of Expenses over Revenue	(3,203)	(1,744)	

Hilton Head Audubon

Statement of Activity Comparison

Fiscal Years Ended April 30, 2023 and 2022

Cash Basis

	Total	
	May 2022 - Apr 2023	May 2021 - Apr 2022
Revenue		
4010 Memberships	16,452	13,083
4110 Donations	10,005	11,714
4120 Fundraising	432	
4210 Educational Programs	468	
4310 Field Trips	1,785	3,398
4420 Grants - Foundation	12,784	4,284
4500 Miscellaneous Income	240	31
Total Revenue	\$ 42,165	\$ 32,510
Gross Profit	\$ 42,165	\$ 32,510
Expenditures		
8020 Membership		100
8110 Speakers, Presentations	625	
8120 Refreshments	607	128
8130 Technology (Website, Zoom)	4,776	2,396
8210 Interns	1,025	
8400 Accounting and Office Supplies	119	179
8510 Rent (Storage)	1,776	1,498
8520 Utilities	657	546
8530 Rental (Space, Equip)	2,220	
8540 Equipment, Repairs & Maintenance	3,090	6,872
8545 Special Projects	1,550	750
8550 Signage	4,274	454
8555 Printing	3,114	
8560 Postage, Shipping	470	
8570 Licenses, Fees and Permits	50	
8580 Taxes	812	736
8610 Bank and Credit Card Fees	1,165	945
8620 PO & Safety Deposit Boxes	60	264
8710 Grants to other entities		2,500
8810 Insurance	1,891	1,891
8890 Miscellaneous	33	921
Total Expenditures	\$ 28,315	\$ 20,179
Net Operating Revenue	\$ 13,851	\$ 12,331
Net Revenue vs. expenses	\$ 13,851	\$ 12,331

\$11k received from National Audubon - spending in FY24

Hilton Head Audubon

Statement of Activity Comparison

Fiscal Years Ended April 30, 2023 and 2022

Cash Basis

	Total	
	May 2022 - Apr 2023	May 2021 - Apr 2022
Revenue		
4010 Memberships	16,452	13,083
4110 Donations	10,005	11,714
4120 Fundraising	432	
4210 Educational Programs	468	
4310 Field Trips	1,785	3,398
4420 Grants - Foundation	12,784	4,284
4500 Miscellaneous Income	240	31
Total Revenue	\$ 42,165	\$ 32,510
Gross Profit	\$ 42,165	\$ 32,510
Expenditures		
8020 Membership		100
8110 Speakers, Presentations	625	
8120 Refreshments	607	128
8130 Technology (Website, Zoom)	4,776	2,396
8210 Interns	1,025	
8400 Accounting and Office Supplies	119	179
8510 Rent (Storage)	1,776	1,498
8520 Utilities	657	546
8530 Rental (Space, Equip)	2,220	
8540 Equipment, Repairs & Maintenance	3,090	6,872
8545 Special Projects	1,550	750
8550 Signage	4,274	454
8555 Printing	3,114	
8560 Postage, Shipping	470	
8570 Licenses, Fees and Permits	50	
8580 Taxes	812	736
8610 Bank and Credit Card Fees	1,165	945
8620 PO & Safety Deposit Boxes	60	264
8710 Grants to other entities		2,500
8810 Insurance	1,891	1,891
8890 Miscellaneous	33	921
Total Expenditures	\$ 28,315	\$ 20,179
Net Operating Revenue	\$ 13,851	\$ 12,331
Net Revenue vs. expenses	\$ 13,851	\$ 12,331

\$11k received from National Audubon - spending in FY24

**Hilton Head Audubon
Balance Sheets
As of August 1, 2024
Cash Basis**

4/30/2023

Cash	\$ 85,405
Total Assets	<u>\$ 85,405</u>
Liabilities	\$ -
Retained Surplus	85,405
Total Liabilities and Retained Surplus	<u>\$ 85,405</u>

Cash at 4/30/23	88,608
Loss for 3 months	-3203
Cash at 8/1/23	85,405

Hilton Head Audubon
Balance Sheets
As of April 30, 2023 and 2022
Cash Basis

	4/30/2023	4/30/2022
Cash	\$ 88,608	\$ 74,909
Total Assets	<u>\$ 88,608</u>	<u>\$ 74,909</u>
Liabilities	\$ -	\$ -
Retained Surplus	88,608	74,909
Total Liabilities and Retained Surplus	<u>\$ 88,608</u>	<u>\$ 74,909</u>

Hilton Head Audubon
Balance Sheets
As of April 30, 2023 and 2022
Cash Basis

	4/30/2023	4/30/2022
Cash	\$ 88,608	\$ 74,909
Total Assets	<u>\$ 88,608</u>	<u>\$ 74,909</u>
Liabilities	\$ -	\$ -
Retained Surplus	88,608	74,909
Total Liabilities and Retained Surplus	<u>\$ 88,608</u>	<u>\$ 74,909</u>

Department of the Treasury
Internal Revenue Service

for Tax-Exempt Organization not Required to File Form 990 or 990-EZ

2022

Open to Public Inspection

A For the 2022 Calendar year, or tax year beginning 2022-05-01 and ending 2023-04-30**B** Check if available Terminated for Business Gross receipts are normally \$50,000 or less**C** Name of Organization: HILTON HEAD ISLAND AUDUBON SOCIETYPO BOX 6185, Hilton Head
Island, SC, US, 29938**D** Employee IdentificationNumber 51-0168071**E** Website:hiltonheadaudubon.org**F** Name of Principal Officer: Sarah Gustafson89 Kingston Dunes Rd,
Hilton Head Island, SC, US,
29928

Privacy Act and Paperwork Reduction Act Notice: We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

Note: This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.

Click on the question-mark icons to display help windows.
 The information provided will enable you to file a more complete return and reduce the chances the IRS will need to contact you.

Form **990-EZ**

Short Form

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2021

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

- ▶ Do not enter social security numbers on this form, as it may be made public.
- ▶ Go to www.irs.gov/Form990EZ for instructions and the latest information.

A For the 2021 calendar year, or tax year beginning May 1, , 2021, and ending April 30 , 20 22

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization <input type="checkbox"/> ? <u>Hilton Head Island Audubon Society</u>		D Employer identification number <input type="checkbox"/> ? <u>510168071</u>
	Number and street (or P.O. box if mail is not delivered to street address) <input type="checkbox"/> ? <u>PO Box 6185</u>	Room/suite _____	E Telephone number <u>703-479-0425</u>
	City or town, state or province, country, and ZIP or foreign postal code <u>Hilton Head Island SC 29938</u>		F Group Exemption Number ▶ <input type="checkbox"/> ?

G Accounting Method: Cash Accrual Other (specify) ▶ _____

I Website: ▶ HILTONHEADAUDUBON.ORG

J Tax-exempt status (check only one) – 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527

K Form of organization: Corporation Trust Association Other _____

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B)) are \$500,000 or more, file Form 990 instead of Form 990-EZ ▶ \$ 32,510

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I) ?
 Check if the organization used Schedule O to respond to any question in this Part I ?

Revenue	<input type="checkbox"/> ? 1	Contributions, gifts, grants, and similar amounts received	1	<u>16,029</u>
	<input type="checkbox"/> ? 2	Program service revenue including government fees and contracts	2	<u>3,398</u>
	<input type="checkbox"/> ? 3	Membership dues and assessments	3	<u>13,083</u>
	<input type="checkbox"/> ? 4	Investment income	4	
	5a	Gross amount from sale of assets other than inventory	5a	
	b	Less: cost or other basis and sales expenses	5b	
	c	Gain or (loss) from sale of assets other than inventory (subtract line 5b from line 5a)	5c	
	6	Gaming and fundraising events:		
	a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b	Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	
c	Less: direct expenses from gaming and fundraising events	6c		
d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d		
7a	Gross sales of inventory, less returns and allowances	7a		
b	Less: cost of goods sold	7b		
c	Gross profit or (loss) from sales of inventory (subtract line 7b from line 7a)	7c		
8	Other revenue (describe in Schedule O)	8		
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶	9	<u>32,510</u>	
Expenses	10	Grants and similar amounts paid (list in Schedule O)	10	<u>2,500</u>
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits <input type="checkbox"/> ?	12	
	13	Professional fees and other payments to independent contractors <input type="checkbox"/> ?	13	
	14	Occupancy, rent, utilities, and maintenance	14	<u>546</u>
	15	Printing, publications, postage, and shipping	15	
	16	Other expenses (describe in Schedule O) <input type="checkbox"/> ?	16	<u>17,133</u>
17	Total expenses. Add lines 10 through 16 ▶	17	<u>20,179</u>	
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 9)	18	<u>12,331</u>
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	<u>62,578</u>
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 ▶	21	<u>74,909</u>

Part II Balance Sheets (see the instructions for Part II)

Check if the organization used Schedule O to respond to any question in this Part II

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	62,578	74,909
23 Land and buildings		
24 Other assets (describe in Schedule O)		
25 Total assets	62,578	74,909
26 Total liabilities (describe in Schedule O)		
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	62,578	74,909

Part III Statement of Program Service Accomplishments (see the instructions for Part III)

Check if the organization used Schedule O to respond to any question in this Part III

What is the organization's primary exempt purpose? See Schedule O, Statement 2

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

Expenses
(Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)

28 MAINTENANCE AND OPERATION OF AUDUBON NEWHALL PRESERVE, A 50 ACRE NATURE PRESERVE. OPEN TO PUBLIC AT NO CHARGE. SEVERAL THOUSAND VISITORS PER YEAR.		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	28a	7,168
29 CONSERVATION: ADVOCACY, EDUCATION PROGRAMS AND COMMUNITY SCIENCE TO PROMOTE PROTECTION AND RESPECT OF CRITICAL HABITAT FOR THREATENED AND ENDANGERED BIRDS. REACH THOUSANDS THROUGH SIGNAGE ON BEACHES, FIELD TRIPS, CHRISTMAS BIRD COUNT, PROGRAMS.		
(Grants \$ 2,500) If this amount includes foreign grants, check here <input type="checkbox"/>	29a	5,368
30 MOTUS: Funding for construction of antenna on HHI for Motus Wildlife Tracking System, an international collaborative research network that uses radio telemetry to track the movement of small flying animals. Thousands of international researchers are and will use data generated from HHI Motus antenna.		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	30a	1,435
31 Other program services (describe in Schedule O)		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	31a	
32 Total program service expenses (add lines 28a through 31a)	32	13,971

Part IV List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated—see the instructions for Part IV)

Check if the organization used Schedule O to respond to any question in this Part IV

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC/1099-NEC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
Kay Grinnell President, Director	5	0	0	0
Lynn Hodgson Vice President, Director	5	0	0	0
Tony Johnson Treasurer, Director	5	0	0	0
Patty Kappmeyer Director of Communications	5	0	0	0
David and Julia Buzzard Directors of Conservation	5	0	0	0
Robert Clemens Director of Newhall Preserve	10	0	0	0
Natalie Hefter Director of Membership	5	0	0	0
Lois Lewis and Mary Ellen Blankenship Directors of Education	5	0	0	0
Carlos Chacon Director of Field Trips	5	0	0	0
Susan Murphy Director of Christmas Bird Count	5	0	0	0
Alan Biggs Director at-large	5	0	0	0

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V

33 Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O
34 Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name.
35a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities...
35b If "Yes" to line 35a, has the organization filed a Form 990-T for the year?
35c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year?
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year?
37a Enter amount of political expenditures, direct or indirect, as described in the instructions
37b Did the organization file Form 1120-POL for this year?
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee; or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?
38b If "Yes," complete Schedule L, Part II, and enter the total amount involved
39 Section 501(c)(7) organizations. Enter:
39a Initiation fees and capital contributions included on line 9
39b Gross receipts, included on line 9, for public use of club facilities
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under:
40b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ?
40c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958
40d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization
40e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction?
41 List the states with which a copy of this return is filed
42a The organization's books are in care of Sarah Gustafson Telephone no. 703-479-0425 Located at 89 Kingston Dunes, Hilton Head Island, SC ZIP + 4 29928
42b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country...
42c At any time during the calendar year, did the organization maintain an office outside the United States?
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the tax year
44a Did the organization maintain any donor advised funds during the year?
44b Did the organization operate one or more hospital facilities during the year?
44c Did the organization receive any payments for indoor tanning services during the year?
44d If "Yes" to line 44c, has the organization filed a Form 720 to report these payments?
45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?
45b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)?

	Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46	✓

Part VI Section 501(c)(3) Organizations Only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

	Yes	No
47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47	✓
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	✓
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a	✓
b If "Yes," was the related organization a section 527 organization?	49b	

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC/1099-NEC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation

f Total number of other employees paid over \$100,000 ▶ _____

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000 ▶ _____

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations must attach a completed Schedule A ▶ **Yes** **No**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	▶ Signature of officer	Date
	▶ Sarah Gustafson, Treasurer FY2022-2023	
	Type or print name and title	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶	Firm's EIN ▶			
	Firm's address ▶	Phone no.			

May the IRS discuss this return with the preparer shown above? See instructions ▶ **Yes** **No**

Click on the question-mark icons to display help windows.
 The information provided will enable you to file a more complete return and reduce the chances the IRS will need to contact you.

Form **990-EZ**

Short Form

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2020

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form, as it may be made public.

▶ Go to www.irs.gov/Form990EZ for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

A For the 2020 calendar year, or tax year beginning May 1, 2020, and ending April 30, 20 21

B Check if applicable:

- Address change
- Name change
- Initial return
- Final return/terminated
- Amended return
- Application pending

C Name of organization

Hilton Head Island Audubon Society

Number and street (or P.O. box if mail is not delivered to street address)

PO Box 6185

City or town, state or province, country, and ZIP or foreign postal code

Hilton Head Island, SC 29938

D Employer identification number

510168071

E Telephone number

F Group Exemption

Number ▶

G Accounting Method: Cash Accrual Other (specify) ▶ _____

I Website: ▶ HILTONHEADAUDUBON.ORG

H Check if the organization is **not**

required to attach Schedule B

(Form 990, 990-EZ, or 990-PF).

J Tax-exempt status (check only one) – 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527

K Form of organization: Corporation Trust Association Other _____

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets

(Part II, column (B)) are \$500,000 or more, file Form 990 instead of Form 990-EZ ▶ \$ 24,207

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)

Check if the organization used Schedule O to respond to any question in this Part I

		Revenue		Expenses		Net Assets	
<input type="checkbox"/>	1 Contributions, gifts, grants, and similar amounts received	1	<u>10,004</u>				
<input type="checkbox"/>	2 Program service revenue including government fees and contracts	2	<u>2,953</u>				
<input type="checkbox"/>	3 Membership dues and assessments	3	<u>9,593</u>				
<input type="checkbox"/>	4 Investment income	4	<u>317</u>				
	5a Gross amount from sale of assets other than inventory	5a					
	b Less: cost or other basis and sales expenses	5b					
	c Gain or (loss) from sale of assets other than inventory (subtract line 5b from line 5a)	5c					
	6 Gaming and fundraising events:						
	a Gross income from gaming (attach Schedule G if greater than \$15,000)	6a					
	b Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b					
	c Less: direct expenses from gaming and fundraising events	6c					
	d Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d					
	7a Gross sales of inventory, less returns and allowances	7a	<u>910</u>				
	b Less: cost of goods sold	7b	<u>223</u>				
	c Gross profit or (loss) from sales of inventory (subtract line 7b from line 7a)	7c	<u>687</u>				
	8 Other revenue (describe in Schedule O)	8	<u>250</u>				
	9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶	9	<u>23,804</u>				
	10 Grants and similar amounts paid (list in Schedule O)	10					
	11 Benefits paid to or for members	11					
	12 Salaries, other compensation, and employee benefits <input type="checkbox"/>	12					
	13 Professional fees and other payments to independent contractors <input type="checkbox"/>	13					
	14 Occupancy, rent, utilities, and maintenance	14	<u>599</u>				
	15 Printing, publications, postage, and shipping	15					
	16 Other expenses (describe in Schedule O) <input type="checkbox"/>	16	<u>14,601</u>				
	17 Total expenses. Add lines 10 through 16 ▶	17	<u>15,200</u>				
	18 Excess or (deficit) for the year (subtract line 17 from line 9)	18	<u>8,604</u>				
	19 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	<u>53,974</u>				
	20 Other changes in net assets or fund balances (explain in Schedule O)	20					
	21 Net assets or fund balances at end of year. Combine lines 18 through 20 ▶	21	<u>62,578</u>				

For Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 106421

Form **990-EZ** (2020)

Part II Balance Sheets (see the instructions for Part II)

Check if the organization used Schedule O to respond to any question in this Part II

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	53,974	62,578
23 Land and buildings		
24 Other assets (describe in Schedule O)		
25 Total assets	53,974	62,578
26 Total liabilities (describe in Schedule O)		
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	53,974	62,678

Part III Statement of Program Service Accomplishments (see the instructions for Part III)

Check if the organization used Schedule O to respond to any question in this Part III

What is the organization's primary exempt purpose? See Schedule O, Statement 3

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

Expenses
(Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)

28 MAINTENANCE AND OPERATION OF AUDUBON NEWHALL PRESERVE, A 50 ACRE NATURE PRESERVE. OPEN TO PUBLIC AT NO CHARGE. SEVERAL THOUSAND VISITORS PER YEAR.		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	28a	7,917
29 CONSERVATION: ADVOCACY, EDUCATION PROGRAMS AND COMMUNITY SCIENCE TO PROMOTE PROTECTION AND RESPECT OF CRITICAL HABITAT FOR THREATENED AND ENDANGERED BIRDS. REACH THOUSANDS THROUGH SIGNAGE ON BEACHES, FIELD TRIPS, CHRISTMAS BIRD COUNT, PROGRAMS.		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	29a	1,937
30		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	30a	
31 Other program services (describe in Schedule O)		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	31a	
32 Total program service expenses (add lines 28a through 31a)	32	9,854

Part IV List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated—see the instructions for Part IV)

Check if the organization used Schedule O to respond to any question in this Part IV

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
John Bloomfield President, Director	5	0	0	0
Lynn Hodgson Vice President, Director	5	0	0	0
Wendy Dickes Treasurer, Director	5	0	0	0
Robert Clemens Director of Newhall Preserve	10	0	0	0
Marina Bloomfield Director of Communications and Membership	10	0	0	0
Jane Hester Secretary, Director	5	0	0	0
John J. Coleman III Director of Conservation	5	0	0	0
Lois Lewis and Mary Ellen Blankenship Directors of Education	5	0	0	0
Carlos Chacon Director of Field Trips	5	0	0	0
Susan Murphy Director, Christmas Bird Count Liason	5	0	0	0
Kay Grinnell Director at-large	5	0	0	0
Julia Buzzard and Alan Biggs Directors at-large	5	0	0	0

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V

33 Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O
34 Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name.
35a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities...
35b If "Yes" to line 35a, has the organization filed a Form 990-T for the year?
35c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year?
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year?
37a Enter amount of political expenditures, direct or indirect, as described in the instructions
37b Did the organization file Form 1120-POL for this year?
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee; or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?
38b If "Yes," complete Schedule L, Part II, and enter the total amount involved
39 Section 501(c)(7) organizations. Enter:
39a Initiation fees and capital contributions included on line 9
39b Gross receipts, included on line 9, for public use of club facilities
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under:
40b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ?
40c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958
40d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization
40e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction?
41 List the states with which a copy of this return is filed
42a The organization's books are in care of Sarah Gustafson Telephone no. 703-479-0425
Located at 89 Kingston Dunes Rd, Hilton Head Island, SC ZIP + 4 29928
42b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country...
42c At any time during the calendar year, did the organization maintain an office outside the United States?
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the tax year
44a Did the organization maintain any donor advised funds during the year?
44b Did the organization operate one or more hospital facilities during the year?
44c Did the organization receive any payments for indoor tanning services during the year?
44d If "Yes" to line 44c, has the organization filed a Form 720 to report these payments?
45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?
45b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)?

	Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46	<input checked="" type="checkbox"/>

Part VI Section 501(c)(3) Organizations Only

All section 501(c)(3) organizations must answer questions 47–49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

	Yes	No
47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47	<input checked="" type="checkbox"/>
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	<input checked="" type="checkbox"/>
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a	<input checked="" type="checkbox"/>
b If "Yes," was the related organization a section 527 organization?	49b	<input type="checkbox"/>

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation

f Total number of other employees paid over \$100,000 ▶ _____

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000 ▶ _____

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations must attach a completed Schedule A ▶ **Yes** **No**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here ?	▶ Signature of officer	Date
	▶ Sarah Gustafson, FY2022-2023 Treasurer	
	Type or print name and title	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶	Firm's EIN ▶			
	Firm's address ▶	Phone no.			

May the IRS discuss this return with the preparer shown above? See instructions ▶ **Yes** **No**

Certificate of Resolution

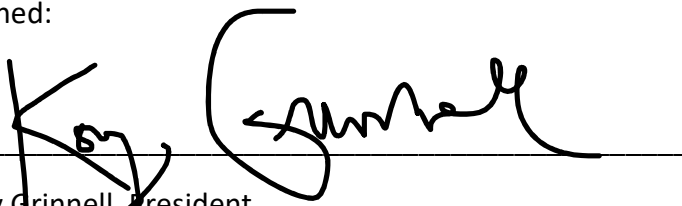
The undersigned as President of the HILTON HEAD ISLAND AUDUBON SOCIETY, INC. certify that the following resolution has been adopted by the Board of Directors and is in full effect:

RESOLVED that the officers of the Hilton Head Island Audubon Society, Inc. (HHA) are directed and empowered to complete and submit the materials and application for the Accommodations Tax Grant. The purpose of asking for funds shall be to enable the HHA to enhance tourists' experience at Audubon Newhall Preserve (Newhall) and increase the number of people visiting Newhall and Hilton Head Island area through the following planned actions:

- install a new welcome kiosk at Newhall to improve visitors' understanding and enjoyment of this unique native habitat and its variety of plant and bird life,
- expand social media interaction resources and advertising to attract more people to Newhall and to birding on the island,
- reprint trail guides for Audubon Newhall Preserve for visitor use,
- host and promote large events to attract eco-tourists.

Should the funding be granted, HHA commits to execute the planned actions described above.

Signed:



Kay Grinnell, President
Hilton Head Island Audubon Society, Inc.
Dated: August 29, 2023

ATAX EFFECTIVENESS MEASUREMENT

Please refer to the *SAMPLE ATAX Effectiveness Measurement Form* for examples. When completing this form, please expand, contract, or add to the sections as needed (but contain the form to a total of approximately 2 pages). You may choose to use your own format instead of this form, and if doing so, please use the criteria below as a guideline. Regardless of format, **each applicant should choose how they measure degree of success. Applicants need to explain why this is an effective measurement technique that reflects results and how that relates to the objective.**

TOPIC	THE PLAN	BUDGET	ACTUAL SPENT	RESULTS	<i>When possible, provide planned results vs. actual results, and/or current year vs. prior year results .</i>
Enhancing Audubon Newhall Preserve - a Destination for Tourists					
<i>Audubon Newhall Preserve Trail Guide Plants and Birds of the Preserve</i>	Revamp and print 10,000 copies	\$2,500	\$ 3,116	Printed 6,000 copies rather than 10,000 due to higher cost. So far have distributed 2,100 copies	
Install four interpretative signs at Newhall Preserve	Increase quality of information to Tourists about unique maritime forest environment	\$10,000	\$ 8,462	All four signs installed on July 31, 2023. Several positive comments from Newhall visitors about the new signs in our visitor log book. The number of people signing our visitor log for January to July 2023 is up 39% versus the same period for 2022. Continued growth expected due to enhancements increasing quality of tourists' visits	
Total		\$ 12,500	\$ 11,578		

Marketing efforts to increase tourist attendance					
Expand social media interaction and advertising to attract more people to Newhall and to birding on the Island	Hire an intern for one-year to expand social media reach by 50% by following, engaging with and scheduling new daily and weekly posts on Instagram and Facebook	\$ 2,400	\$ 1,000	Intern has worked for 5 months so far April to August	Between Jan 1, 2023-Aug 27, 2023, our Facebook reach was 90% higher than the previous 6-month period. Our Facebook visits increased by 1,377 over the previous 6-month period During the last 90 days, our Facebook post reach increased 167% from the previous 90 day period. Our engagement rose 437% from the previous 90-day period. Our highest-responded to post had 660% more reaction than in the previous period.
	Targeted advertising on Facebook	\$ 2,000	\$ 500	Planned four facebook campaigns. Executed first campaign in June, results below. Next campaign planned for September.	Our first Facebook ad, in June, reached 10,567, with 800 engagements, including 647 reactions, 115 link clicks & 27 shares.
	Subscribe to social media management dashboard Hootsuite to monitor all social media conversation about HHI and to contribute consistently to the dialogue for promoting our events, bird walks and Newhall Preserve	\$ 688	\$ 1,026	During the last four months (when our analytics tracking began), the HH Audubon website had 3.55K clicks, and 89.6k impressions (link seen by visitors in search results.)	The most visited pages were: HHA Website home page: 1,385 visits, 15,456 web impressions Audubon Newhall page: 814 visits, 10,350 web impressions Guide to HH Beaches for Dog Owners: 372 Visits, 32,877 Web Impressions Birds of HH 310 visits; 7,867 web impressions
Total		5,088	2,526		

Total Budget to Actual \$ 17,588 \$ 14,104

Internal Revenue Service

Date: April 6, 2007

HILTON HEAD ISLAND AUDUBON SOCIETY
% CLEMENS P DIETZE
277 MOSS CREEK DR
HILTON HEAD SC 29926-1073

Department of the Treasury
P. O. Box 2508
Cincinnati, OH 45201

Person to Contact:

Kim A. Chambers 31-07674
Customer Service Specialist

Toll Free Telephone Number:
877-829-5500

Federal Identification Number:
51-0168071

Dear Sir or Madam:

This is in response to your request of April 6, 2007, regarding your organization's tax-exempt status.

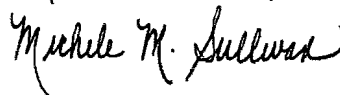
In January 1976 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under section 509(a)(2) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations 1

Date: JAN 14 1976

Person to Contact:
Barbara Pierce

Telephone Number:
(404) 526-4516

Refer Reply to:

EP/EO 7203:2273

Hilton Head Island Audobon Society,
Inc.
P. O. Box 5176
Neidlinger Building, Colligny Plaza
Hilton Head, S.C. 29928

Advance Ruling Period Ends: August 31, 1977

Gentlemen:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

We have further determined you can reasonably be expected to be an organization of the type described in section 509(a)(2). Accordingly, for your first three tax years, you will be treated as an organization which is not a private foundation.

At the end of your first three tax years, however, you must establish with the Internal Revenue Service that for such three years you were in fact an organization of the type described in section 509(a)(2). If you establish this fact with the Service, you will be classified as a section 509(a)(2) organization for all purposes beginning with the first day of your fourth tax year and you must normally meet the requirements of section 509(a)(2) thereafter. If, however, you do not meet the requirements of section 509(a)(2) for your first three tax years, you will be classified as a private foundation as of the first day of your fourth tax year. Furthermore, you will be treated as a private foundation as of the first day of your first tax year for purposes of section 507(d) and 4940.

Grantors and donors may rely on the determination that you are not a private foundation for your first three tax years, unless notice that you will no longer be treated as a section 509(a)(2) organization is published in the Internal Revenue Bulletin. However, a grantor or donor may not rely on such determination if he was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 509(a)(2) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(2) organization.

You are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. You are not liable for the taxes imposed under the Federal Unemployment Tax Act (FUTA).

cc: Peter L. Wolf

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible under sections 2055, 2106, and 2522 of the Code.

If your sources of support, or your purposes, character, or method of operation is changed, you must let us know so we can consider the effect of the change on your status. Also, you must inform us of all changes in your name or address.

If your gross receipts each year are normally more than \$5,000, you are required to file Form 990, Return of Organization Exempt From Income Tax, by the 15th day of the fifth month after the end of your annual accounting period. The law imposes a penalty of \$10 a day, up to a maximum of \$5,000, for failure to file a return on time.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

Please keep this determination letter in your permanent records.

Sincerely yours,

J. T. Wilson

Exempt-Organization Specialist