We Are Columbia

Tuesday, January 19, 2016	2:00 PM	City Hall - Conference Room

The Columbia City Council will conduct a Work Session on Tuesday, January, 19, 2016 at 2:00 PM at City Hall - Conference Room at 1737 Main Street, Second Floor, Columbia, SC 29201.

ROLL CALL

FINANCIAL REPORT

1. September 2015 Financial Report

CITY COUNCIL DISCUSSION

2. Sanitary Sewer Overview: Pre and Post Flood Conditions and Impacts to Crane Creek
3. City Council Chambers

HOSPITALITY TAX FUND

4. Overview of Fiscal Year 2015/2016 Hospitality Tax Budget
5. Hospitality Tax Study
6. Yellow Shirts Program
7. Devine Street Association
8. Columbia Classical Ballet
9. Columbia Open Studios 2016

EXECUTIVE SESSION

10. Discussion of Employment of an Employee
    - *Legal Department*
11. Receipt of Legal Advice on Matters Covered by Attorney-Client Privilege
    - *Taboo*
    - *SS7231-12 Sanitary Sewer Easement Mechanical Clearing Project*

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **Finance**

FROM: ***Jan Alonso, Finance Director***

SUBJECT: **September 2015 Financial Report**

PRESENTER: **Ms. Jan Alonso, Finance Director**

FINANCIAL IMPACT:

STRATEGIC GOALS: **Improve Communication**

ATTACHMENTS:

- September Council Financial Report (PDF)

City of Columbia
General Fund Summary - Revenue and Expenditures - Current to Prior Year Variance
September 30, 2015

		ACTUAL PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	ACTUAL PRIOR YEAR THRU SEP 2014	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT TO PRIOR VARIANCE	% ANNUAL BUDGET
	REVENUE						
1	GENERAL PROPERTY TAX	50,563,321	51,826,115	3,345,478	3,232,068	(113,410)	6.2%
2	LICENSES AND PERMITS	37,837,446	36,197,981	1,465,980	1,526,520	60,540	4.2%
3	FROM OTHER AGENCIES	13,788,976	13,086,467	150,154	988,831	838,677	7.6%
4	CURRENT SERVICE CHARGES	12,454,655	12,119,990	3,209,365	3,117,417	(91,948)	25.7%
5	FINES & FORFEITURES	1,033,384	1,102,000	522,341	563,833	41,492	51.2%
6	SPECIAL EVENTS	78,322	83,400	3,230	3,630	400	4.4%
7	MISCELLANEOUS REVENUE	60,179	36,000	14,287	5,391	(8,896)	15.0%
8	INTEREST ON INVESTMENT	146,658	75,000		20,948	20,948	27.9%
9	RENTS & SALE OF PROPERTY	463,663	290,000	33,092	155,790	122,698	53.7%
10	**TOTAL REVENUE**	**116,426,604**	**114,816,953**	**8,743,927**	**9,614,428**	**870,501**	8.4%
11	**TRANSFERS IN**						
12	FROM OTHER FUNDS	12,991				0	
13	FROM ACCOMMODATIONS TAX	25,000	25,000	0	25,000	25,000	100.0%
14	FROM COUNTY FIRE	0	-				
15	FROM HOSPITALITY TAX	2,569,143	3,000,000		750,000	750,000	25.0%
16	FROM GO BOND PROCEEDS	4,964,784	5,000,000	1,589,930		(1,589,930)	0.0%
17	FROM WATER & SEWER OPERATING	6,270,000	4,945,605	567,500	1,236,401	668,901	25.0%
18	FROM PARKING FUND	0	500,000		125,000		25.0%
19	FROM HYDRO	500,000	-	375,000		(375,000)	
20	UN-APPROPRIATED SURPLUS		2,440,000				0.0%
21	**TOTAL TRANSFERS IN**	**14,341,918**	**15,910,605**	**2,532,430**	**2,136,401**	**(396,029)**	13.4%
22							
23	**TOTAL GEN FUND REV & TRF**	**130,768,522**	**130,727,558**	**11,276,357**	**11,750,829**	**474,472**	9.0%
24							
25	**EXPENDITURES - DEPARTMENTS**						
26	LEGISLATIVE - MAYOR & CITY COUN(	696,448		187,191		(187,191)	
26A	COUNCIL		343,656		56,128	56,128	16.3%
26B	MAYOR		435,963		117,362	117,362	26.9%
27	ADMINISTRATION - CITY MANAGER	435,349	486,628	98,655	97,629	(1,026)	20.1%
28	ADMINISTRATION - GOV'T AFFAIRS	446,070	452,766	107,319	94,806	(12,513)	20.9%
29	ADMINISTRATION - ACM OPERATION	386,810	368,446	97,608	60,358	(37,250)	16.4%
30	ADMINISTRATION - ACM-CFO	203,083	188,144	59,547	36,200	(23,347)	19.2%
31	ADMINISTRATION - SR. ASSISTANT C	294,019	316,118	60,110	60,789	679	19.2%
32	HUMAN RESOURCES	902,493	980,446	189,925	215,059	25,134	21.9%
33	BUDGET & PROG MGMT OFFICE	307,875	351,937	80,304	67,455	(12,849)	19.2%
34	PUBLIC RELATIONS	560,996	567,473	126,562	118,710	(7,852)	20.9%
35	COUNCIL SUPPORT SERVICES	420,066	547,441	94,670	98,707	4,037	18.0%
36	LEGAL	1,687,261	1,931,146	314,410	561,638	247,228	29.1%
37	MUNICIPAL COURT	2,590,810	2,640,768	575,714	549,536	(26,178)	20.8%
38	FINANCE	1,779,283	1,846,587	405,269	379,587	(25,682)	20.6%
39	OFFICE OF BUSINESS OPPORTUNITIE	548,615	771,659	85,951	155,372	69,421	20.1%
40	COMMUNITY DEVELOPMENT	327,455	326,714	69,025	66,003	(3,022)	20.2%
41	DEVELOPMENT CORPORATIONS		1,390,025		347,509		25.0%
42	DEVELOPMENT SERVICES	3,485,413	3,282,167	878,135	717,917	(160,218)	21.9%
43	POLICE	34,819,390	36,702,564	6,955,162	7,112,356	157,194	19.4%
44	911 EMERGENCY COMMUNICATION	2,668,505	2,950,376	599,576	534,727	(64,849)	18.1%
45	FIRE	20,950,635	21,389,468	4,209,737	4,089,848	(119,889)	19.1%
46	PARKS & RECREATION	10,836,443	11,144,264	2,223,358	2,308,850	85,492	20.7%
47	PUBLIC WORKS	17,880,627	18,568,454	4,306,574	3,375,532	(931,042)	18.2%
48	GENERAL SRVCS/SUPPORT SERVICES	2,007,768	2,212,398	428,330	287,972	(140,358)	13.0%
49	INFORMATION TECHNOLOGY	3,222,902	3,549,991	807,038	1,285,006	477,968	36.2%
50	**TOTAL DEPARTMENT**	**107,458,316**	**113,745,599**	**22,960,170**	**22,795,056**	**(165,114)**	20.0%
51	**EXPEND. - NON-DEPT. & MISC.**						
52	COMMUNITY PROMOTION - AGENCI	175,670	475,000	46,750	70,000	23,250	14.7%
53	SOLICITOR'S OFFICE	215,817	215,817			0	0.0%
54	HOMELESS SERVICES	843,550	1,000,000	156		(156)	0.0%
55	SPECIAL EMERGENCY RESERVE	0	-			0	
56	DETENTION CENTER PER DIEM	490,425	225,000	35,925	87,633	51,708	38.9%
57	ECONOMIC DEVELOPMENT - RESERV	75,000	75,000	25,000		(25,000)	0.0%
58	NON-DEPARTMENTAL & MISC.	128,848	1,790,000	43,960	31,998	(11,962)	1.8%
59	OFFICE SPACE LEASE	500,369	505,000	138,861	104,146	(34,715)	20.6%
60	CAPITAL LEASE PAYMENT	445,525			267,315	267,315	
61	OTHER SERVICES AND CHARGES	4,969	0	(137)	(920)	(783)	
62	**TOTAL NON-DEPARTMENTAL**	**2,880,173**	**4,285,817**	**290,515**	**560,172**	**269,657**	13.1%
63	**TOTAL EXPENDITURES**	**110,338,489**	**118,031,416**	**23,250,685**	**23,355,228**	**104,543**	19.8%
64	**TRANSFERS OUT**						
65	TO OTHER FUNDS					0	
66	TO INTERNAL SERVICE FUNDS	4,771,878	2,093,285	12,464	530,635	518,171	25.35%
67	TO SPECIAL REVENUES	82	-			0	
68	TO DEBT SERVICE	5,927,980	6,577,973		1,644,493	1,644,493	25.00%
69	TO GRANTS	1,302		80		(80)	
70	TO CAPITAL IMPROVEMENTS	6,166,637				0	
71	TO STORM WATER	500,000				0	
72	TO CAPITAL REPLACEMENTS	0	4,024,884			0	0.00%
73	**TOTAL TRANSFERS OUT**	**17,367,879**	**12,696,142**	**12,544**	**2,175,128**	**2,162,584**	17.13%
74							
75	**TOTAL GEN FUND EXPEND & TRF**	**127,706,368**	**130,727,558**	**23,263,229**	**25,530,356**	**2,267,127**	19.53%
76							
77	**TOTAL SURPLUS (DEFICIT)**	**3,062,154**	**-**	**(11,986,872)**	**(13,779,527)**		

City of Columbia
General Fund Summary - Revenue and Expenditures - Actual to Budget Variance
September 30, 2015

		BUDGET PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	BUDGET CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL TO BUDGET VARIANCE THRU SEP 2015	% ANNUAL BUDGET	OPEN ENCUMBRANCES THRU SEP 2015
	REVENUE							
1	GENERAL PROPERTY TAX	51,406,365	51,826,115	12,956,529	3,232,068	(9,724,461)	6.2%	
2	LICENSES AND PERMITS	30,732,426	36,197,981	9,049,497	1,526,520	(7,522,977)	4.2%	
3	FROM OTHER AGENCIES	12,690,828	13,086,467	3,271,617	988,831	(2,282,786)	7.6%	
4	CURRENT SERVICE CHARGES	12,091,624	12,119,990	3,029,998	3,117,417	87,420	25.7%	
5	FINES & FORFEITURES	1,310,000	1,102,000	275,500	563,833	288,333	51.2%	
6	SPECIAL EVENTS	137,300	83,400	20,850	3,630	(17,220)	4.4%	
7	MISCELLANEOUS REVENUE	77,000	36,000	9,000	5,391	(3,609)	15.0%	
8	INTEREST ON INVESTMENT	50,000	75,000	18,750	20,948	2,198	27.9%	
9	RENTS & SALE OF PROPERTY	264,404	290,000	72,500	155,790	83,290	53.7%	
10	**TOTAL REVENUE**	**108,759,947**	**114,816,953**	**28,704,240**	**9,614,428**	**(19,089,812)**	8.4%	
11	**TRANSFERS IN**							
12	FROM OTHER FUNDS	0	0		0			
13	FROM ACCOMMODATIONS TAX	25,000	25,000	6,250	25,000	18,750	100.0%	
14	FROM COUNTY FIRE	0	0	0	0	-		
15	FROM HOSPITALITY TAX	2,569,143	3,000,000	750,000	750,000	-	25.0%	
16	FROM GO BOND PROCEEDS	7,000,000	5,000,000	1,250,000	0	(1,250,000)	0.0%	
17	FROM WATER & SEWER OPERATING	6,270,000	4,945,605	1,236,401	1,236,401	(0)	25.0%	
18	FROM PARKING FUND	0	500,000	125,000	125,000	-	25.0%	
19	FROM HYDRO	500,000	0		0	-		
20	UN-APPROPRIATED SURPLUS	3,801,844	2,440,000	610,000	0	(610,000)	0.0%	
21	**TOTAL TRANSFERS IN**	**20,165,987**	**15,910,605**	**3,977,651**	**2,136,401**	**(1,841,250)**	**13.4%**	
22								
23	**TOTAL GEN FUND REV & TRF**	**128,925,934**	**130,727,558**	**32,681,892**	**11,750,829**	**(20,931,063)**	**9.0%**	
24								
25	**EXPENDITURES - DEPARTMENTS**							
26	LEGISLATIVE - MAYOR & CITY COUN(	744,599	0	0	0	-		10,000
26A	COUNCIL		343,656	85,915	56,128	(29,787)	16.3%	
26B	MAYOR		435,963	108,991	117,362	8,371	26.9%	
27	ADMINISTRATION - CITY MANAGER	522,083	486,628	121,660	97,629	(24,031)	20.1%	-
28	ADMINISTRATION - GOV'T AFFAIRS	452,766	452,766	113,196	94,806	(18,390)	20.9%	119,521
29	ADMINISTRATION - ACM OPERATION	374,445	368,446	92,114	60,358	(31,756)	16.4%	66,300
30	ADMINISTRATION - ACM-CFO	205,400	188,144	47,039	36,200	(10,839)	19.2%	1,130
31	ADMINISTRATION - SR. ASSISTANT C	312,507	316,118	79,031	60,789	(18,242)	19.2%	700
32	HUMAN RESOURCES	980,446	980,446	245,115	215,059	(30,056)	21.9%	1,267
33	BUDGET & PROG MGMT OFFICE	343,936	351,937	87,988	67,455	(20,533)	19.2%	2,224
34	PUBLIC RELATIONS	573,171	567,473	141,869	118,710	(23,159)	20.9%	11,870
35	COUNCIL SUPPORT SERVICES	421,247	547,441	136,864	98,707	(38,157)	18.0%	16,857
36	LEGAL	2,059,960	1,931,146	482,790	561,638	78,848	29.1%	265,718
37	MUNICIPAL COURT	2,722,116	2,640,768	660,200	549,536	(110,664)	20.8%	948
38	FINANCE	1,912,136	1,846,587	461,655	379,587	(82,068)	20.6%	-
39	OFFICE OF BUSINESS OPPORTUNITIE	558,553	771,659	192,918	155,372	(37,546)	20.1%	9,181
40	COMMUNITY DEVELOPMENT	370,472	326,714	81,683	66,003	(15,680)	20.2%	-
41	DEVELOPMENT CORPORATIONS		1,390,025	347,507		(347,507)	0.0%	-
42	DEVELOPMENT SERVICES	3,788,788	3,282,167	820,546	717,917	(102,629)	21.9%	305,671
43	POLICE	36,803,460	36,702,564	9,175,656	7,112,356	(2,063,300)	19.4%	1,107,092
44	911 EMERGENCY COMMUNICATION	2,959,403	2,950,376	737,595	534,727	(202,868)	18.1%	52,815
45	FIRE	21,188,013	21,389,468	5,347,387	4,089,848	(1,257,539)	19.1%	396,742
46	PARKS & RECREATION	11,220,425	11,144,264	2,786,076	2,308,850	(477,226)	20.7%	493,248
47	PUBLIC WORKS	19,588,976	18,568,454	4,642,160	3,375,532	(1,266,628)	18.2%	368,689
48	GENERAL SRVCS/SUPPORT SERVICES	2,721,772	2,212,398	553,103	287,972	(265,131)	13.0%	793,041
49	INFORMATION TECHNOLOGY	3,680,722	3,549,991	887,499	1,285,006	397,507	36.2%	256,937
50	**TOTAL DEPARTMENT**	**114,505,396**	**113,745,599**	**28,436,557**	**22,795,056**	**(5,641,501)**	20.0%	4,279,952
51	**EXPEND. - NON-DEPT. & MISC.**							
52	COMMUNITY PROMOTION - AGENCI	270,670	475,000	118,750	70,000	(48,750)	14.7%	-
53	SOLICITOR'S OFFICE	215,817	215,817	53,955	0	(53,955)	0.0%	-
54	HOMELESS SERVICES	1,000,000	1,000,000	250,000	0	(250,000)	0.0%	1,075,115
55	SPECIAL EMERGENCY RESERVE	108,473	0	0	0	-		-
56	DETENTION CENTER PER DIEM	450,000	225,000	56,250	87,633	31,383	38.9%	-
57	ECONOMIC DEVELOPMENT RESERVE	75,000	75,000	18,750	0	(18,750)	0.0%	-
58	NON-DEPARTMENTAL & MISC.	231,000	1,790,000	447,500	31,998	(415,502)	1.8%	84,282
59	OFFICE SPACE LEASE	505,000	505,000	126,250	104,146	(22,104)	20.6%	400,184
60	CAPITAL LEASE PAYMENT			0	267,315	267,315		-
61	OTHER SERVICES AND CHARGES	0	0	0	(920)	(920)		-
62	**TOTAL NON-DEPARTMENTAL**	**2,855,960**	**4,285,817**	**1,071,455**	**560,172**	**(511,283)**	13.1%	1,559,581
63	**TOTAL EXPENDITURES**	**117,361,356**	**118,031,416**	**29,508,012**	**23,355,228**	**(6,152,784)**	19.8%	5,839,533
64	**TRANSFERS OUT**							
65	TO OTHER FUNDS							
66	TO INTERNAL SERVICE FUNDS	1,868,285	2,093,285	523,321	530,635	7,314	25.35%	
67	TO SPECIAL REVENUES	0	0	0	0	-		
68	TO DEBT SERVICE	5,927,980	6,577,973	1,644,493	1,644,493	(0)	25.00%	
69	TO GRANTS	0	0	0	0	-		
70	TO CAPITAL IMPROVEMENTS	513,320	0	0	0	-		
71	TO STORM WATER	500,000	0	0	0	-		
72	TO CAPITAL REPLACEMENTS	2,754,993	4,024,884	1,006,221	0	(1,006,221)	0.00%	
73	**TOTAL TRANSFERS OUT**	**11,564,578**	**12,696,142**	**3,174,036**	**2,175,128**	**(998,908)**	17.13%	
74								
75	**TOTAL GEN FUND EXPEND & TRF**	**128,925,934**	**130,727,558**	**32,682,048**	**25,530,356**	**(7,151,692)**	19.53%	
76								
77	**TOTAL SURPLUS (DEFICIT)**	**-**	**-**	**(156)**	**(13,779,527)**			

City of Columbia
Hospitality Fund Summary - Revenue and Expenditures -Current to Prior Year Variance
As of 09/30/2015

UNAUDITED

		ACTUAL PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	ACTUAL PRIOR YEAR THRU SEP 2014	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT TO PRIOR VARIANCE	% ANNUAL BUDGET
	REVENUE						
1	TAXES	10,450,637	10,414,760	2,443,843	2,423,928	(19,915)	23.3%
2	INTEREST	4,907	0	0	0	0	0.0%
3	UNAPPROPRIATED SURPLUS	0	839,688	0	0	0	0.0%
4	**TOTAL HOSP FUND REVENUE**	**10,455,544**	**11,254,448**	**2,443,843**	**2,423,928**	**(19,915)**	21.5%
5							
6	**EXPEND. - NON-DEPT & MISC.**						
7	CITY COUNCIL LINE ITEM AG.	0	2,555,057	0	518,802	518,802	20.3%
8	HOSPITALITY TAX	6,308,175	3,078,844	1,200,499	486,803	(713,696)	15.8%
9	SPECIAL PROJECTS	0	25,000	0	0	0	0.0%
10	**TOTAL NON-DEPARTMENTAL**	**6,308,175**	**5,658,901**	**1,200,499**	**1,005,605**	(194,894)	17.8%
11	**TOTAL EXPENDITURES**	**6,308,175**	**5,658,901**	**1,200,499**	**1,005,605**	**194,894**	17.8%
12	**TRANSFERS OUT**						
13	TO GENERAL FUND	2,569,143	3,000,000	0	0	0	0.0%
14	TO DEBT SERVICE	2,642,567	2,595,547	0	0	0	0.0%
15	**TOTAL TRANSFERS OUT**	**5,211,710**	**5,595,547**	**0**	**0**	**0**	0.0%
16							
17	**TOTAL HOSP FUND EXP & TRF**	**11,519,885**	**11,254,448**	**1,200,499**	**1,005,605**	**194,894**	8.9%
18							
19							
20	**TOTAL SURPLUS (DEFICIT)**	**(1,064,341)**	**-**	**1,243,344**	**1,418,323**		

City of Columbia
Hospitality Fund Summary - Revenue and Expenditures - Actual to Budget Variance
As of 09/30/2015

UNAUDITED

		BUDGET PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	BUDGET CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL TO BUDGET VARIANCE THRU SEP 2015	% ANNUAL BUDGET	OPEN ENCUMBRANCES THRU SEP 2015
	REVENUE							
1	TAXES	10,081,994	10,414,760	2,603,690	2,423,928	(179,762)	23.3%	0
2	INTEREST	1,830,224	0	0	0	0	0.0%	0
3	UNAPPROPRIATED SURPLUS	0	839,688	209,922	0	(209,922)	0.0%	0
4	**TOTAL HOSP FUND REVENUE**	**11,912,218**	**11,254,448**	**2,813,612**	**2,423,928**	**(389,684)**	21.5%	-
5								
6	**EXPEND. - NON-DEPT & MISC.**							
7	CITY COUNCIL LINE ITEM AG.	0	2,555,057	638,765	518,802	0	20.3%	0
8	HOSPITALITY TAX	6,600,508	3,078,844	769,712	486,803	(282,909)	15.8%	0
9	SPECIAL PROJECTS	100,000	25,000	6,250	0	(6,250)	0.0%	0
10	**TOTAL NON-DEPARTMENTAL**	**6,700,508**	**5,658,901**	**1,414,727**	**1,005,605**	(289,159)	17.8%	**0**
11	**TOTAL EXPENDITURES**	**6,700,508**	**5,658,901**	**1,414,727**	**1,005,605**	**409,122**	17.8%	-
12	**TRANSFERS OUT**							
13	TO GENERAL FUND	2,569,143	3,000,000	750,000	0	(750,000)	0.0%	0
14	TO DEBT SERVICE	2,642,567	2,595,547	648,887	0	(648,887)	0.0%	0
15	**TOTAL TRANSFERS OUT**	**5,211,710**	**5,595,547**	**1,398,887**	**0**	**(1,398,887)**	0.0%	-
16								
17	**TOTAL HOSP FUND EXP & TRF**	**11,912,218**	**11,254,448**	**2,813,614**	**1,005,605**	**1,808,009**	8.9%	-
18								
19								
20	**TOTAL SURPLUS (DEFICIT)**	**-**	**-**	**(2)**	**1,418,323**			

City of Columbia
Parking Summary - Revenue and Expenditures - Current to Prior Year Variance
As of 09/30/2015

UNAUDITED

		ACTUAL PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	ACTUAL PRIOR YEAR THRU SEP 2014	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT TO PRIOR VARIANCE	% ANNUAL BUDGET
	REVENUE						
1	CURRENT SERVICE CHARGES	5,167,608	5,009,650	1,177,506	1,127,926	(49,580)	22.5%
2	FINES & FORFEITURES	1,870,873	2,100,000	454,536	421,447	(33,089)	20.1%
3	MISCELLANEOUS REVENUE	239	60,000	0	288	288	0.5%
4	INTEREST ON INVESTMENT	77,005	104,850	7,159	8,468	1,309	8.1%
5	RENTS & SALE OF PROPERTY	110,490	0	27,169	27,169	0	0.0%
6	**TOTAL REVENUE**	**7,226,215**	**7,274,500**	**1,666,370**	**1,585,298**	**(81,072)**	21.8%
7	**TRANSFERS IN**						
8	FROM SCANA REBATE	0	0	0	0	0	0.0%
9	FROM PURCHASING	0	0	0	0	0	0.0%
10	FROM HEALTH INS	0	0	0	0	0	0.0%
11	FROM GEN ADMIN IT	0	0	0	0	0	0.0%
12	**TOTAL TRANSFERS IN**	**0**	**0**	**0**	**0**	**0**	0.0%
13							
14	**TOTAL PARKING REV & TRF**	**7,226,215**	**7,274,500**	**1,666,370**	**1,585,298**	**(81,072)**	21.8%
15							
16	**EXPENDITURES - DEPARTMENTS**						
17	FINANCE	149,558	141,550	24,057	30,323	6,266	21.4%
18	PUBLIC WORKS	75,402	94,720	5,519	12,332	6,813	13.0%
19	PARKING OPERATIONS	1,251,954	1,306,628	283,067	250,702	(32,365)	19.2%
20	PARKING FACILITIES	1,656,316	1,501,962	268,777	337,481	68,704	22.5%
22	PARKING ADMINISTRATION	411,587	521,115	92,924	117,145	24,221	22.5%
23	**TOTAL DEPARTMENT**	**3,544,817**	**3,565,975**	**674,344**	**747,983**	**73,639**	21.0%
24	**EXPEND. - NON-DEPART & MISC.**						
25	DEBT SERVICE	2,416,330	2,811,413	531,211	443,427	(87,784)	15.8%
26	DEPRECIATION	1,505,756	0	0	0	0	0.0%
27	TUITION REIMBURSMENT	0	5,000	0	0	0	0.0%
28	EMPLOYEE PAY RAISES	0	142,000	0	0		
29	SPECIAL PROJECTS	0	0	0	0	0	0.0%
30	RESERVE	0	10,000	0	0	0	0.0%
31	NON DEPARTMENTAL ADMINISTRATI'	22,293	0	0	0	0	0.0%
32	NON DEPARTMENTAL BAD DEBT	8,024	0	0	0	0	0.0%
33	**TOTAL NON-DEPARTMENTAL**	**3,952,403**	**2,968,413**	**531,211**	**443,427**	(87,784)	14.9%
34	**TOTAL EXPENDITURES**	**7,497,220**	**6,534,388**	**1,205,555**	**1,191,410**	**(14,145)**	18.2%
35	**TRANSFERS OUT**						
36	TO GENERAL FUND	0	500,000	0	125,000	0	25.0%
37	TO RISK MANAGEMENT	100,000	100,000	0	25,000	25,000	25.0%
38	TO GENERAL ADMIN INFO TECH	138,554	140,112	0	35,028	35,028	25.0%
39	TO HEALTH INSURANCE	40,176	0	0	0	0	0.0%
40	TO WORKER'S COMP	42,177	0	0	0	0	0.0%
41	TO PURCHASING	1,417	0	698	6,195	5,497	0.0%
42	TO GENERAL TORT	262	0	0	0	0	0.0%
43	**TOTAL TRANSFERS OUT**	**322,585**	**740,112**	**698**	**191,223**	**65,525**	25.84%
44							
45	**TOTAL PARKING EXP & TRF**	**7,819,805**	**7,274,500**	**1,206,253**	**1,382,633**	**176,380**	19.0%
46							
47	**TOTAL SURPLUS (DEFICIT)**	**(593,590)**	**0**	**460,117**	**202,665**		

City of Columbia
Parking Summary - Revenue and Expenditures - Actual to Budget Variance
As of 09/30/2015

UNAUDITED

		BUDGET PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	BUDGET CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL TO BUDGET VARIANCE THRU SEP 2015	% ANNUAL BUDGET	OPEN ENCUMBRANCES THRU SEP 2015
	REVENUE							
1	CURRENT SERVICE CHARGES	4,660,450	5,009,650	1,252,413	1,127,926	(124,487)	22.5%	0
2	FINES & FORFEITURES	2,100,000	2,100,000	525,000	421,447	(103,553)	20.1%	0
3	MISCELLANEOUS REVENUE	0	0	0	288	288	0.0%	0
4	INTEREST ON INVESTMENT	60,000	60,000	15,000	8,468	(6,532)	14.1%	0
5	RENTS & SALE OF PROPERTY	104,850	104,850	26,213	27,169	956	25.9%	0
6	**TOTAL REVENUE**	**6,925,300**	**7,274,500**	**1,818,626**	**1,585,298**	**(233,328)**	21.8%	**0**
7	**TRANSFERS IN**							
8	FROM ARRA GRANT	0	0	0	0	0	0.0%	0
9	FROM PARKING IMPROVEMENTS	0	0	0	0	0	0.0%	0
10	FROM HEALTH INS	0	0	0	0	0	0.0%	0
11	FROM GEN ADMIN IT	0	0	0	0	0	0.0%	0
12	**TOTAL TRANSFERS IN**	**0**	**0**	**0**	**0**	**0**	0.0%	**0**
13								
14	**TOTAL PARKING REV & TRF**	**6,925,300**	**7,274,500**	**1,818,626**	**1,585,298**	**(233,328)**	21.8%	**0**
15								
16	**EXPENDITURES - DEPARTMENTS**							
17	FINANCE	181,815	141,550	35,389	30,323	(5,066)	21.4%	0
18	PUBLIC WORKS	96,388	94,720	23,681	12,332	(11,349)	13.0%	3,777
19	PARKING OPERATIONS	1,207,018	1,306,628	326,659	250,702	(75,957)	19.2%	18,515
20	PARKING FACILITIES	1,408,759	1,501,962	375,494	337,481	(38,013)	22.5%	59,345
22	PARKING ADMINISTRATION	405,539	521,115	130,283	117,145	(13,138)	22.5%	25,884
23	**TOTAL DEPARTMENT**	**3,299,519**	**3,565,975**	**891,506**	**747,983**	**(143,523)**	21.0%	**107,522**
24	**EXPEND. - NON-DEPART & MISC.**					0		
25	DEBT SERVICE	3,165,248	2,811,413	702,853	443,427	(259,426)	15.8%	0
26	DEPRECIATION	181,979	0	0	0	0	0.0%	0
27	TUITION REIMBURSMENT	5,000	5,000	1,250	0	(1,250)	0.0%	0
28	EMPLOYEE PAY RAISES	0	142,000	35,500	0	(35,500)	0.0%	0
29	SPECIAL PROJECTS	0	0	0	0	0	0.0%	0
30	RESERVE	15,000	10,000	2,500	0	(2,500)	0.0%	0
31	NON DEPARTMENTAL ADMINISTRATIVE	0	0	0	0	0	0.0%	0
32	NON DEPARTMENTAL BAD DEBT	0	0	0	0	0	0.0%	0
33	**TOTAL NON-DEPARTMENTAL**	**3,367,227**	**2,968,413**	**742,103**	**443,427**	(298,676)	14.9%	**0**
34	**TOTAL EXPENDITURES**	**6,666,746**	**6,534,388**	**1,633,609**	**1,191,410**	**(442,199)**	18.2%	**107,522**
35	**TRANSFERS OUT**							
36	TO GENERAL FUND	0	500,000	125,000	125,000	0	25.0%	0
37	TO RISK MANAGEMENT	100,000	100,000	25,000	25,000	0	25.0%	0
38	TO GENERAL ADMIN INFO TECH	138,554	140,112	35,028	35,028	0	25.0%	0
39	TO HEALTH INSURANCE	0	0	0	0	0	0.0%	0
40	TO WORKER'S COMP	0	0	0	0	0	0.0%	0
41	TO PURCHASING	20,000	0	0	6,195	6,195	0.0%	0
42	TO GENERAL TORT	0	0	0	0	0	0.0%	0
43	**TOTAL TRANSFERS OUT**	**258,554**	**740,112**	**185,028**	**191,223**	6,195	25.8%	**0**
44								
45	**TOTAL PARKING EXP & TRF**	**6,925,300**	**7,274,500**	**1,818,637**	**1,382,633**	**(436,004)**	19.0%	**107,522**
46								
47	**TOTAL SURPLUS (DEFICIT)**	**0**	**0**	**(11)**	**202,665**			

City of Columbia
Water/Sewer Summary - Revenue & Expenditures - Current to Prior Year Variance
As of 09/30/2015 **UNAUDITED**

#		ACTUAL PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	ACTUAL PRIOR YEAR THRU SEP 2014	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT TO PRIOR VARIANCE	% ANNUAL BUDGET
	REVENUE						
1	INTERGOVERNMENTAL REVENUES	0	0	0	8,606,581	8,606,581	0.0%
2	CHARGES FOR SERVICES	119,159,647	132,380,145	35,834,077	39,937,205	4,103,128	30.2%
3	FINES & FORFEITURES	379,213	300,000	82,366	163,953	81,587	54.7%
4	MISCELLANEOUS REVENUE	20,298	10,000	2,500	44,513	42,013	445.1%
5	INTEREST REVENUES	1,059,323	950,000	14,566	14,834	268	1.6%
6	RENTS & SALE OF PROPERTY	(1,340,370)	140,000	33,803	30,616	(3,187)	21.9%
7	CONTRIBUTIONS	3,872,664	0	0	8,100	8,100	0.0%
8	**TOTAL REVENUE**	**123,150,775**	**133,780,145**	**35,967,312**	**48,805,802**	**12,838,490**	36.5%
9	**TRANSFERS IN**						
10	FROM OTHER FUNDS	1,295	0	0	0	0	0.0%
11	UNAPPROPRIATED SURPLUS	0	0	0	0	0	0.0%
12	**TOTAL TRANSFERS IN**	**1,295**	**0**	**0**	**0**	0	0.0%
13							
14	**TOTAL WATER/SEWER REV & TRF**	**123,152,070**	**133,780,145**	**35,967,312**	**48,805,802**	**12,838,490**	**36.5%**
15							
16	**EXPENDITURES - DEPARTMENTS**						
17	FINANCE	3,660,935	6,337,286	726,686	876,887	150,201	13.8%
18	ECONOMIC & COMM DEV	2,552,743	1,212,213	612,716	267,589	(345,127)	22.1%
19	POLICE	546,364	619,719	110,342	119,967	9,625	19.4%
20	FIRE	372,847	461,997	63,180	93,195	30,015	20.2%
21	PUBLIC WORKS	918,256	1,477,031	352,729	159,250	(193,479)	10.8%
22	GENERAL SRVCS/SUPPORT SERVICES	1,503,935	1,647,279	262,904	274,330	11,426	16.7%
23	INFORMATION TECHNOLOGY	415,703	483,363	79,109	101,753	22,644	21.1%
24	ENGINEERING:ADMINISTRATION	1,393,082	1,367,675	315,337	311,513	(3,824)	22.8%
25	ENGINEERING:GENERAL SERVICES	1,161,210	2,987,491	220,589	376,227	155,638	12.6%
26	WATER CUSTOMER SERVICE	3,053,164	3,208,852	705,117	709,679	4,562	22.1%
27	WATER DISTRIBUTION & MAINTENANCE	9,158,960	10,536,566	1,873,635	1,849,619	(24,016)	17.6%
28	WASTEWATER MAINTENANCE	9,194,879	13,066,959	1,562,244	1,658,419	96,175	12.7%
29	COLUMBIA CANAL WTP	5,188,552	6,843,828	1,093,275	1,177,600	84,325	17.2%
30	LAKE MURRAY WTP	5,518,397	6,584,739	1,103,377	1,129,110	25,733	17.1%
31	METRO WWTP	12,994,033	18,517,187	2,176,277	2,009,068	(167,209)	10.8%
32	WATER MAINTENANCE PROJECTS	602,245	0	1,415	79,982	78,567	0.0%
33	SEWER MAINTENANCE PROJECTS	50,144	0	(137,179)	0	137,179	0.0%
34	WATER SYSTEMS IMPROVEMENTS	1,963,949	2,173,914	557,920	415,800	(142,120)	19.1%
35	WASTEWATER SYSTEMS IMPROVEMENTS	1,008,371	1,578,482	125,879	280,557	154,678	17.8%
36	REAL ESTATE WATER	283,192	231,117	95,028	48,112	(46,916)	20.8%
37	REAL ESTATE WASTE	162,384	218,383	14,462	46,829	32,367	21.4%
38	WATER/SEWER IMPROVEMENTS	3,825,867	0	0	0	0	0.0%
39	**TOTAL DEPARTMENT**	**65,529,212**	**79,554,081**	**11,915,042**	**11,985,486**	70,444	15.1%
40	**EXPENDITURES - NON-DEPARTMENTAL & MISC.**						
41	DEBT SERVICE	10,972,349	29,006,859	4,823,849	4,780,312	(43,537)	16.5%
42	DEPRECIATION	30,928,260	0	0	0	0	0.0%
43	TUITION REIMBURSEMENT	7,438	35,000	2,438	750	(1,688)	2.1%
44	TECHNOLOGY CONTINGENCY	524,649	250,000	0	0	0	0.0%
45	EMPLOYEE PAY RAISES	0	1,000,000	0	0	0	0.0%
46	EMPLOYEE TRAINING	50,000	50,000	0	0	0	0.0%
47	ECONOMIC DEVELOPMENT SPECIAL PROJECTS	103,500	78,500	0	0	0	0.0%
48	RESERVE	0	0	0	0	0	0.0%
49	ADMINISTRATIVE	296,327	0	0	0	0	0.0%
50	NON-DEPARTMENTAL BAD DEBT	1,417,512	631,000	1,121	2,941	1,820	0.5%
51	**TOTAL NON-DEPARTMENTAL**	**44,300,035**	**31,051,359**	**4,827,408**	**4,784,003**	(43,405)	15.4%
52							
53	**TOTAL EXPENDITURES**	**109,829,247**	**110,605,440**	**16,742,450**	**16,769,489**	**27,039**	15.2%
54							
55	**TRANSFERS OUT**						
56	TO GENERAL FUND	6,270,000	2,675,605	567,500	1,236,401	668,901	46.2%
57	TO CAPITAL PROJECTS FUND	137,480	0	0	0	0	0.0%
58	TO WATER/SEWER IMPROVEMENTS	0	19,394,367	0	0	0	0.0%
59	TO RISK MANAGEMENT	500,000	500,000	0	125,000	125,000	25.0%
60	TO GENERAL TORT	3,525	0	0	0	0	0.0%
61	TO HEALTH INSURANCE	541,401	0	0	0	0	0.0%
62	TO WORKER'S COMP	568,359	0	0	0	0	0.0%
63	TO CENTRAL STORES	0	150,000	0	37,500	37,500	25.0%
64	TO GEN ADM INFO TECH	454,733	454,733	0	113,683	113,683	25.0%
65	TO PURCHASING	355,874	0	77,480	81,982	4,502	0.0%
66	**TOTAL TRANSFERS OUT**	**8,831,372**	**23,174,705**	**644,980**	**1,594,566**	949,586	6.9%
67							
68	**TOTAL WATER/SEWER EXP & TRF**	**118,660,619**	**133,780,145**	**17,387,430**	**18,364,055**	**976,625**	**13.7%**
69							
70							
71	**TOTAL SURPLUS (DEFICIT)**	**4,491,451**	**0**	**18,579,882**	**30,441,747**		

City of Columbia
Water/Sewer Summary - Revenue & Expenditures - Actual to Budget Variance
As of 09/30/2015

UNAUDITED

		BUDGET PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	BUDGET CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL TO BUDGET VARIANCE THRU SEP 2015	% ANNUAL BUDGET	OPEN ENCUMBRANCES THRU SEP 2015
	REVENUE							
1	INTERGOVERNMENTAL REVENUES	0	0	0	8,606,581	8,606,581	0.0%	
2	CHARGES FOR SERVICES	125,928,595	132,380,145	33,095,037	39,937,205	6,842,168	30.2%	
3	FINES & FORFEITURES	300,000	300,000	75,000	163,953	88,953	54.7%	
4	MISCELLANEOUS REVENUE	10,000	10,000	2,500	44,513	42,013	445.1%	
5	INTEREST REVENUES	1,206,500	950,000	237,500	14,834	(222,666)	1.6%	
6	RENTS & SALE OF PROPERTY	140,000	140,000	35,000	30,616	(4,384)	21.9%	
7	CONTRIBUTIONS	0	0	0	8,100	8,100	0.0%	
8	**TOTAL REVENUE**	**127,585,095**	**133,780,145**	**33,445,037**	**48,805,802**	**15,360,765**	36.5%	
9	**TRANSFERS IN**							
10	FROM OTHER FUNDS	0	0	0	0	0	0.0%	
11	UNAPPROPRIATED SURPLUS	618,097	0	0	0	0	0.0%	
12	**TOTAL TRANSFERS IN**	**618,097**	**0**	**0**	**0**	0	0.0%	
13								
14	**TOTAL WATER/SEWER REV & TRF**	**128,203,192**	**133,780,145**	**33,445,037**	**48,805,802**	**15,360,765**	**36.5%**	
15								
16	**EXPENDITURES - DEPARTMENTS**							
17	FINANCE	6,444,339	6,337,286	1,584,328	876,887	(707,441)	13.8%	298,537
18	ECONOMIC & COMM DEV	2,811,011	1,212,213	303,055	267,589	(35,466)	22.1%	41,074
19	POLICE	659,258	619,719	154,932	119,967	(34,965)	19.4%	0
20	FIRE	472,442	461,997	115,501	93,195	(22,306)	20.2%	0
21	PUBLIC WORKS	1,677,136	1,477,031	369,260	159,250	(210,010)	10.8%	55,138
22	GENERAL SRVCS/SUPPORT SERVICES	1,945,672	1,647,279	411,823	274,330	(137,493)	16.7%	220,177
23	INFORMATION TECHNOLOGY	503,293	483,363	120,843	101,753	(19,090)	21.1%	5,978
24	ENGINEERING:ADMINISTRATION	1,387,677	1,367,675	341,919	311,513	(30,406)	22.8%	0
25	ENGINEERING:GENERAL SERVICES	1,725,179	2,987,491	746,876	376,227	(370,649)	12.6%	1,637,806
26	WATER CUSTOMER SERVICE	3,325,548	3,208,852	802,214	709,679	(92,535)	22.1%	1,402
27	WATER DISTRIBUTION & MAINTENANCE	11,318,814	10,536,566	2,634,142	1,849,619	(784,523)	17.6%	1,721,316
28	WASTEWATER MAINTENANCE	12,336,977	13,066,959	3,266,745	1,658,419	(1,608,326)	12.7%	2,637,523
29	COLUMBIA CANAL WTP	6,464,601	6,843,828	1,710,961	1,177,600	(533,361)	17.2%	1,424,989
30	LAKE MURRAY WTP	6,152,232	6,584,739	1,646,189	1,129,110	(517,079)	17.1%	1,376,244
31	METRO WWTP	17,969,778	18,517,187	4,629,300	2,009,068	(2,620,232)	10.8%	5,597,537
32	WATER MAINTENANCE PROJECTS	0	0	0	79,982	79,982	0.0%	0
33	SEWER MAINTENANCE PROJECTS	0	0	0	0	0	0.0%	(1)
34	WATER SYSTEMS IMPROVEMENTS	2,123,577	2,173,914	543,481	415,800	(127,681)	19.1%	16,719
35	WASTEWATER SYSTEMS IMPROVEMENTS	1,513,747	1,578,482	394,627	280,557	(114,070)	17.8%	15,713
36	REAL ESTATE WATER	228,948	231,117	57,783	48,112	(9,671)	20.8%	103
37	REAL ESTATE WASTE	218,091	218,383	54,598	46,829	(7,769)	21.4%	62
38	WATER/SEWER IMPROVEMENTS	0	0	0	0	0	0.0%	0
39	**TOTAL DEPARTMENT**	**79,278,320**	**79,554,081**	**19,888,577**	**11,985,486**	(7,903,091)	15.1%	**15,050,316**
40	**EXPENDITURES - NON-DEPARTMENTAL & MISC.**							
41	DEBT SERVICE	29,008,192	29,006,859	7,251,715	4,780,312	(2,471,403)	16.5%	0
42	DEPRECIATION	0	0	0	0	0	0.0%	0
43	TUITION REIMBURSEMENT	35,000	35,000	8,750	750	(8,000)	2.1%	0
44	TECHNOLOGY CONTINGENCY	286,467	250,000	62,500	0	(62,500)	0.0%	0
45	EMPLOYEE PAY RAISES	0	1,000,000	250,000		(250,000)	0.0%	0
46	EMPLOYEE TRAINING	50,000	50,000	12,500	0	(12,500)	0.0%	50,000
47	ECONOMIC DEVELOPMENT SPECIAL PROJECTS	103,500	78,500	19,625	0	(19,625)	0.0%	25,000
48	RESERVE	1,000,000	0	0	0	0	0.0%	0
49	ADMINISTRATIVE							
50	NON-DEPARTMENTAL BAD DEBT	750,000	631,000	157,750	2,941	(154,809)	0.5%	0
51	**TOTAL NON-DEPARTMENTAL**	**31,233,159**	**31,051,359**	**7,762,840**	**4,784,003**	(2,978,837)	15.4%	**75,000**
52								
53	**TOTAL EXPENDITURES**	**110,511,479**	**110,605,440**	**27,651,417**	**16,769,489**	**(10,881,928)**	15.2%	**15,125,316**
54								
55	**TRANSFERS OUT**							
56	TO GENERAL FUND	4,000,000	2,675,605	668,901	1,236,401	567,500	46.2%	
57	TO CAPITAL PROJECTS FUND	0	0	0	0	0	0.0%	
58	TO WATER/SEWER IMPROVEMENTS	12,736,981	19,394,367	4,848,592	0	(4,848,592)	0.0%	
59	TO RISK MANAGEMENT	500,000	500,000	125,000	125,000	0	25.0%	
60	TO GENERAL TORT			0				
61	TO HEALTH INSURANCE			0				
62	TO WORKER'S COMP			0				
63	TO CENTRAL STORES	0	150,000	37,500	37,500	0	25.0%	
64	TO GEN ADM INFO TECH	454,733	454,733	113,683	113,683	(0)	25.0%	
65	TO PURCHASING	0	0	0	81,982	81,982	0.0%	
66	**TOTAL TRANSFERS OUT**	**17,691,714**	**23,174,705**	**5,793,676**	**1,594,566**	(4,199,110)	6.9%	
67								
68	**TOTAL WATER/SEWER EXP & TRF**	**128,203,193**	**133,780,145**	**33,445,093**	**18,364,055**	**(15,081,038)**	**13.7%**	**15,125,316**
69								
70								
71	**TOTAL SURPLUS (DEFICIT)**	**(1)**	**0**	**(56)**	**30,441,747**			

City of Columbia
Stormwater Summary - Revenue & Expenditures - Current to Prior Year Variance
As of 09/30/2015

UNAUDITED

		ACTUAL PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	ACTUAL PRIOR YEAR THRU SEP 2014	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT TO PRIOR VARIANCE	% ANNUAL BUDGET
	REVENUE						
1	CHARGES FOR SERVICES	7,217,599	6,939,000	1,829,596	1,857,128	27,532	26.8%
2	FINES & FORFEITURES	3,550	15,000	0	0	0	0.0%
3	MISCELLANEOUS REVENUES	0	0	0	75,000	75,000	0.0%
4	INTEREST REVENUES	90,231	150,000	0	0	0	0.0%
5	RENTS & SALE OF PROPERTY	11,205	0	0	0	0	0.0%
6	INTERGOVERNMENTAL REVENUES	300,000	0	0	100,000	100,000	0.0%
7	UNAPPROPRIATED SURPLUS	0	0	0	0	0	0.0%
8	**TOTAL REVENUE**	**7,622,585**	**7,104,000**	**1,829,596**	**2,032,128**	**202,532**	28.6%
9	**TRANSFERS IN**						
10	FROM GENERAL FUND	500,000	0	0	0	0	0.0%
11	FROM HEALTH INSURANCE			0	0	0	0.0%
12	FROM GEN ADMIN IT			0	0	0	0.0%
13	**TOTAL TRANSFERS IN**	**500,000**	**0**	**0**	**0**	0	0.0%
14							
15	**TOTAL STORMWATER REV & TRF**	**8,122,585**	**7,104,000**	**1,829,596**	**2,032,128**	**202,532**	**28.6%**
16							
17	**EXPENDITURES - DEPARTMENTS**						
18	STREETS:STORM DRAIN MAINTENANCE	1,455,346	2,257,499	350,421	306,804	(43,617)	13.6%
19	SOLID WASTE STREET SWEEPING	686,089	984,897	158,082	142,900	(15,182)	14.5%
20	STORM WATER:OPERATIONS	20,408	0	950	6,245	5,295	0.0%
21	STORM WATER:ENGINEERING	1,321,175	2,288,363	206,933	329,760	122,827	14.4%
22	REAL ESTATE STORM WATER	64,846	87,046	5,213	18,777	13,564	21.6%
23	STORM DRAIN MAINTENANCE	117,591	0	16,376	7,735	(8,641)	0.0%
24	STORM DRAIN IMPROVEMENTS	152,488	0	0	0	0	0.0%
25	**TOTAL DEPARTMENT**	**3,817,943**	**5,617,805**	**737,975**	**812,221**	**74,246**	14.5%
26	**EXPENDITURES - NON-DEPARTMENTAL & MISC.**						
27	DEPRECIATION	790,049	0	0	0	0	0.0%
28	EMPLOYEE PAY RAISES	0	100,000	0	0	0	0.0%
29	ADMINISTRATIVE	22,700	0	0	0	0	0.0%
30	BAD DEBT EXPENSE	(1,264)	0	0	0	0	0.0%
31	**TOTAL NON-DEPARTMENTAL**	**811,485**	**100,000**	**0**	**0**	0	0.0%
32							
33	**TOTAL EXPENDITURES**	**4,629,428**	**5,717,805**	**737,975**	**812,221**	**74,246**	14.2%
34							
35	**TRANSFERS OUT**						
36	TO STORM WATER IMPROVEMENTS	0	1,386,195	0	0	0	0.0%
37	TO GENERAL TORT	266	0	0	0	0	0.0%
38	TO HEALTH INSURANCE	40,887	0	0	0	0	0.0%
39	TO WORKER'S COMP	42,923	0	0	0	0	0.0%
40	TO CAPITAL PROJECT FUND	0	0	0	0	0	0.0%
41	**TOTAL TRANSFERS OUT**	**84,076**	**1,386,195**	**0**	**0**	**0**	0.0%
42							
43	**TOTAL STORMWATER EXP & TRF**	**4,713,504**	**7,104,000**	**737,975**	**812,221**	**74,246**	11.4%
44							
45							
46	**TOTAL SURPLUS (DEFICIT)**	**3,409,081**	**0**	**1,091,621**	**1,219,907**		

City of Columbia
Stormwater Summary - Revenue & Expenditures - Actual to Budget Variance
As of 09/30/2015

UNAUDITED

		BUDGET PRIOR YEAR FY 2014/15	BUDGET CURRENT YEAR FY 2015/16	BUDGET CURRENT YEAR THRU SEP 2015	ACTUAL CURRENT YEAR THRU SEP 2015	ACTUAL TO BUDGET VARIANCE THRU SEP 2015	% ANNUAL BUDGET	OPEN ENCUMBRANCES THRU SEP 2015
	REVENUE							
1	CHARGES FOR SERVICES	6,939,000	6,939,000	1,734,750	1,857,128	122,378	26.8%	
2	FINES & FORFEITURES	0	15,000	3,750	0	(3,750)	0.0%	
3	MISCELLANEOUS REVENUES		0	0	75,000	75,000	0.0%	
4	INTEREST REVENUES	150,000	150,000	37,500	0	(37,500)	0.0%	
5	RENTS & SALE OF PROPERTY	0	0	0	0	0	0.0%	
6	INTERGOVERNMENTAL REVENUES				100,000	100,000	0.0%	
7	UNAPPROPRIATED SURPLUS	0	0	0	0	0	0.0%	
8	**TOTAL REVENUE**	**7,089,000**	**7,104,000**	**1,776,000**	**2,032,128**	**256,128**	28.6%	
9	**TRANSFERS IN**							
10	FROM GENERAL FUND	500,000	0	0	0	0	0.0%	
11	FROM HEALTH INSURANCE		0	0	0	0	0.0%	
12	FROM GEN ADMIN IT		0	0	0	0	0.0%	
13	**TOTAL TRANSFERS IN**	**500,000**	**0**	**0**	**0**	0	0.0%	
14								
15	**TOTAL STORMWATER REV & TRF**	**7,589,000**	**7,104,000**	**1,776,000**	**2,032,128**	**256,128**	**28.6%**	
16								
17	**EXPENDITURES - DEPARTMENTS**							
18	STREETS:STORM DRAIN MAINTENANCE	2,316,700	2,257,499	564,376	306,804	(257,572)	13.6%	90,430
19	SOLID WASTE STREET SWEEPING	945,562	984,897	246,225	142,900	(103,325)	14.5%	10,155
20	STORM WATER:OPERATIONS	0	0	0	6,245	6,245	0.0%	
21	STORM WATER:ENGINEERING	1,803,048	2,288,363	572,093	329,760	(242,333)	14.4%	276,735
22	REAL ESTATE STORM WATER	86,915	87,046	21,763	18,777	(2,986)	21.6%	31
23	STORM DRAIN MAINTENANCE	0	0	0	7,735	7,735	0.0%	
24	STORM DRAIN IMPROVEMENTS	0	0	0	0	0	0.0%	491,299
25	**TOTAL DEPARTMENT**	**5,152,225**	**5,617,805**	**1,404,457**	**812,221**	**(592,236)**	14.5%	**868,650**
26	**EXPENDITURES - NON-DEPARTMENTAL & MISC.**							
27	DEPRECIATION	0	0	0	0	0	0.0%	0
28	EMPLOYEE PAY RAISES	44,000	100,000	25,000	0	(25,000)	0.0%	0
29	ADMINISTRATIVE	0	0	0	0	0	0.0%	0
30	BAD DEBT EXPENSE	0	0	0	0	0	0.0%	0
31	**TOTAL NON-DEPARTMENTAL**	**44,000**	**100,000**	**25,000**	**0**	(25,000)	0.0%	**0**
32								
33	**TOTAL EXPENDITURES**	**5,196,225**	**5,717,805**	**1,429,457**	**812,221**	**(617,236)**	14.2%	**868,650**
34								
35	**TRANSFERS OUT**							
36	TO STORM WATER IMPROVEMENTS	2,392,775	1,386,195	346,549	0	(346,549)	0.0%	0
37	TO GENERAL TORT		0	0	0	0	0.0%	0
38	TO HEALTH INSURANCE		0	0	0	0	0.0%	0
39	TO WORKER'S COMP		0	0	0	0	0.0%	0
40	TO CAPITAL PROJECT FUND	0	0	0	0	0	0.0%	0
41	**TOTAL TRANSFERS OUT**	**2,392,775**	**1,386,195**	**346,549**	**0**	**(346,549)**	0.0%	
42								
43	**TOTAL STORMWATER EXP & TRF**	**7,589,000**	**7,104,000**	**1,776,006**	**812,221**	**(963,785)**	11.4%	**868,650**
44								
45								
46	**TOTAL SURPLUS (DEFICIT)**	**0**	**0**	**(6)**	**1,219,907**			

City of Columbia
Bull Street Commons Summary - Revenue and Expenditures
As of 09/30/2015 Preliminary\Unaudited

Expenditures	Source	Amount
FY' 16 Expenditures		
FY' 15 Expenditures		
Professional Services		
Faegre Baker Daniels - Dev.\Lic. Agreement	GF - Legal Department	34,582.05
McNair - Dev. Agreement	GF - Finance	12,937.98
FY' 14 Expenditures		
Brailsford & Dunlavey - FS\Dev\Lic. Agreement	GF - Finance Department	45,064.66
Faegre Baker Daniels - Dev.\Lic. Agreement	GF - Legal Department	71,956.35
McNair - Dev. Agreement\Funding	GF - Legal Department	52,686.05
Tedder - Dev. Agreement	GF - Legal Department	33,810.98
Faegre Baker Daniels - Dev.\Lic. Agreement	GF - Legal Department	29,610.90
McNair - Lic. Agreement\Funding	WS - Finance Department	43,044.56
McNair - Lic. Agreement\Funding	WS - Finance Department	77,362.50
Brailsford & Dunlavey - FS\Dev\Lic. Agreement	WS - Finance Department	13,445.09
FY' 13 Expenditures		
Tedder - Dev. Agreement	GF - Legal Department	22,380.07
Total Columbia Common Expenditures		436,881.19

City of Columbia
Multi-Use Entertainment Venue
As of 09/30/2015 Preliminary\Unaudited

Revenue	Source	Amount
Bond Proceeds Revenue	**Bond**	29,922,839.30
COI (Cost of Issuance)		
Reporting Agencies		(48,000.00)
Attorney's		(481,750.00)
Financial Advisor		(202,206.64)
Trustee/Registrar/Paying Agent		(6,150.00)
Printing Costs		(1,809.16)
Debt Service Reserve Fund Surety		(26,864.38)
Underwirter Loop Capital		(137,529.35)
Interest Earned		9,046.47
		29,027,576.24

Expenditures	Source	Amount	Encumbrances
Professional Services			
Populous Group LLC	**Bond**	1,917,981.02	539,781.60
F&ME Consultants	**Bond**	165,727.50	4,032.50
CCEB Venue Partners	**Bond**	6,983,154.00	20,882,698.00
S&ME Inc	**Bond**	8,980.00	
The State	**Bond**	265.66	58.34
Dennis Corporation	**Bond**	22,078.75	63,041.20
Total Multi-Use Entertainment Venue Expenses		9,098,186.93	21,489,611.64
Bond Balance		19,929,389.31	

Water\Sewer\Stormwater Expenditures	
SD841001 BS Drainage Improvements	1,425,591.99
SS730101 Bull Street	126,690.41
WM431501 Bull Street Water System Improvement	20,705.42

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE:	**January 19, 2016**
DEPARTMENT:	**Utilities and Engineering**
FROM:	***Joey Jaco, Director of Utilities and Engineering***
SUBJECT:	**Sanitary Sewer Overview: Pre and Post Flood Conditions and Impacts to Crane Creek**
FINANCIAL IMPACT:	
STRATEGIC GOALS:	**Invest in Infrastructure**

Clean Water 2020
Columbia's Clear Vision For Clean Water

Sanitary Sewer Overview: Pre and Post Flood Conditions and Impacts to Crane Creek

Joey Jaco, PE
Director of Utilities & Engineering
January 19, 2016

City of Columbia, S.C. — We Are Columbia

BUILD COLUMBIA
The Blueprint for a World Class City

1

Overview

- Capacity Assurance Program Impacts
- Challenges Since October 2015 Floods
- Current Status of Crane Creek Project
- Looking Forward

We Are Columbia
Clean Water 2020 — Columbia's Clear Vision For Clean Water
BUILD COLUMBIA — The Blueprint for a World Class City

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CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE:	**January 19, 2016**
DEPARTMENT:	**City Clerk**
FROM:	***Erika Moore, City Clerk***
SUBJECT:	**City Council Chambers**
PRESENTER:	**Mr. David Knoche, General Services Director**
FINANCIAL IMPACT:	
STRATEGIC GOALS:	**Improve Communication, Invest in Infrastructure**

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Clerk**

FROM: ***Erika Moore, City Clerk***

SUBJECT: **Overview of Fiscal Year 2015/2016 Hospitality Tax Budget**

PRESENTER: **Ms. Melisa Caughman, Budget and Program Management Director**

FINANCIAL IMPACT:

ATTACHMENTS:

- FY 15-16 HT Budget 1-13-16 (PDF)

CITY OF COLUMBIA HOSPITALITY TAX	ACTUAL FY 11/12	ACTUAL FY 12/13	ACTUAL FY 13/14	ACTUAL FY 14/15	AMENDED FY 15/16	ESTIMATES FY 16/17 [2]
REVENUE						
HOSPITALITY TAX	8,772,819	9,434,072	9,766,442	10,429,065	10,399,760	11,498,044
HOSPITALITY TAX LATE FEES	16,652	16,859	18,187	21,573	15,000	15,000
INTEREST	19,324	23,196		4,907		
TOTAL REVENUE	**8,808,795**	**9,474,127**	**9,784,629**	**10,455,545**	**10,414,760**	**11,513,044**
TRANSFERS IN						
FROM FUND BALANCE		-			839,688	0
TOTAL TRANSFERS IN	**0**	**0**	**-**	**-**	**839,688**	**-**
TOTAL GENERAL FUND REV & TRANS	**8,808,795**	**9,474,127**	**9,784,629**	**10,455,545**	**11,254,448**	**11,513,044**
% Growth	***4.9%***	***7.6%***	***3.5%***	***6.9%***		***5.0%***
EXPENDITURE						
HOSPITALITY COMMITTEE *(include prior year carry forwards)*	2,296,880	2,772,843	2,127,212	2,718,663	2,444,345	2,260,000
LINE ITEM AGENCIES	2,146,600	1,948,600	2,314,200	2,601,265	2,555,057	2,555,057
CITY COUNCIL ALLOCATIONS	625,458	491,213	1,273,896	988,247	659,500	*379,500*
TOTAL HOSPITALITY ALLOCATIONS	**5,068,938**	**5,212,656**	**5,715,308**	**6,308,175**	**5,658,902**	**5,194,557**
TRANSFER TO GENERAL FUND	1,000,000	2,800,000	3,000,000	2,569,143	3,000,000	3,000,000
DEBT SERVICE	2,602,324	1,346,949	1,346,949	2,642,567	2,595,546	2,600,643
TOTAL TRANSFERS OUT	**8,765,096**	**9,359,605**	**10,062,257**	**11,519,885**	**11,254,448**	**10,795,200**
TOTAL SURPLUS/(DEFICIT)	***43,699***	**114,522**	**(277,628)**	**(1,064,340)**	**0**	**717,844**
BEGINNING FUND BALANCE	2,022,910	2,066,609	2,181,131	*1,903,503*	*839,163*	
ENDING FUND BALANCE	2,066,609	2,181,131	1,903,503	*839,163*	*(525)*	

NOTES

1 Assumes 5.% revenue growth annually based on past 4 year actuals
2 Reflects Council allocations as of 1/5/16 and annual appropriations

SECTION 6-1-730. Use of revenue from local hospitality tax.

(A) The revenue generated by the hospitality 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 and renourishment;

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

(5) advertisements and promotions related to tourism development; or

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

(B)(1) In a county in which at least nine hundred thousand dollars in accommodations taxes is collected annually pursuant to Section 12-36-920, the revenues of the hospitality tax authorized in this article may be used for the operation and maintenance of those items provided in (A)(1) through (6) including police, fire protection, emergency medical services, and emergency-preparedness operations

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Clerk**

FROM: ***Erika Moore, City Clerk***

SUBJECT: **Hospitality Tax Study**

PRESENTER: **Mr. David A. Cárdenas Ph.D., Assistant Professor and Research Associate for the University of South Carolina School of Hotel, Restaurant & Tourism Management**

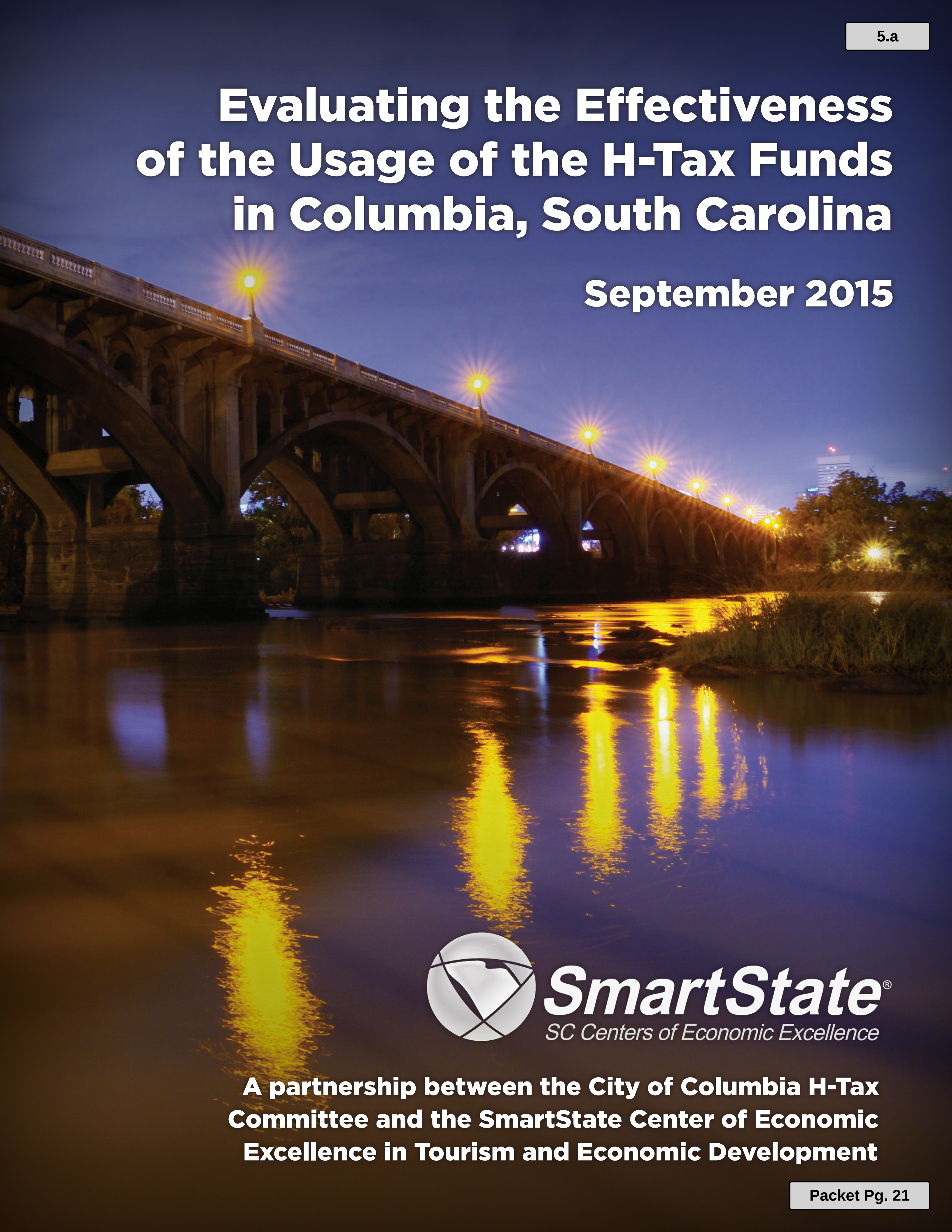
FINANCIAL IMPACT:

ATTACHMENTS:

- H tax final report (PDF)

Evaluating the Effectiveness of the Usage of the H-Tax Funds in Columbia, South Carolina

September 2015



SmartState®
SC Centers of Economic Excellence

A partnership between the City of Columbia H-Tax Committee and the SmartState Center of Economic Excellence in Tourism and Economic Development

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EXECUTIVE SUMMARY

The City of Columbia has been collecting and allocating hospitality tax (H-Tax) dollars for over a decade. Hospitality tax dollars are generated by a 2% tax on prepared food and beverages sold in the city and collections are used to promote tourism to help attract visitors to the region with the goal of increasing the region's economic base. The City Council has established an eleven-member Hospitality Tax Advisory Committee that reviews all applications and forwards recommendations to City Council, and in 2015 that committee requested that the SmartState Center of Economic Excellence in Tourism and Economic Development serve as an impartial, external body to evaluate the effectiveness of the process.

In an effort to evaluate the effective usage of the H-Tax funds, a mixed-methodology research approach was used by the Center that included: an in-depth literature review and examination of best practices; an examination of the data collected by the Council from a questionnaire they sent to all 2013 H-Tax recipients in August 2013; data collection from both residents and visitors at H-Tax sponsored events in 2015; and qualitative data collected from both focus groups and interviews with the committee, as well as observations of the application process.

The literature supports the use of hospitality tax dollars to promote tourism and foster community enrichment, and researchers tend to agree that investment in events and festivals can be an effective use of tax dollars. One study, specifically focused on South Carolina, found that the use of tax funds for the promotion of the arts, cultural events, and other tourism-related events is a successful strategy, enabling tourism growth, while feeding a virtuous cycle that yields still greater tourism dollars for the community. The same study suggested that long-term interests are best served by allocating tourism taxes toward initiatives that will provide special reasons for visitors to come to their community.

Analysis of the data collected from H-Tax recipients by the City of Columbia, suggested that the average grant received was around $65,000 in 2013, the average attendance was approximately 35,000, and just over half of the attendees were visiting from outside of Columbia. Not surprisingly, respondents indicated that their event improved the quality of life for the community, and suggested that if funding was discontinued it would negatively impact their marketing efforts and could impact the size of the event and/or cause the event to be cancelled. Respondents said that the H-Tax process could be improved by going online with a revised timeline, and by having different application criteria for new events/organizations.

From the two focus groups with members of the H-Tax Committee, several key themes emerged. Much conversation focused on the evaluation of applicants, a process that the committee felt was thorough and fair. Discussion also centered on the involvement of the council in this process. The committee would prefer council respect committee judgments and not make political decisions (by overruling the committee's decisions). Members of the committee also felt improvements could be made in the education or training of applicants – before, during and after the event. Some discussion focused on the measures used by event organizers to gauge the success of their respective events, and how these measures need to improve. Finally, some felt a lack of visioning from the City of Columbia hampered the H-Tax process.

The surveys from the events revealed that both residents and visitors reflected very positively on the events they attended, hearing about the events primarily via social media and friends and family. They would all highly recommend the event they attended to their friends and relatives, and plan to return in the future. The majority of visitors from outside Columbia said that their main purpose for the trip was to attend the event, and after visiting, they had a very favorable image of the city and would recommend Columbia to others. Residents felt that the events supported by the H-Tax improve their quality of life, increase the variety of entertainment in Columbia, make it a more interesting place to live in, and bring the community together.

We have made several recommendations based on these findings, the most important one being that funding should be continued, and if possible additional events be funded. It is clear that both residents and visitors experienced a very high level of satisfaction with the events and that these events are thus enhancing the reputation and image of the city. In fact, Columbia's events could be used more as "a selling point" to attract new residents and new businesses to the city. A comprehensive economic impact study that would put a dollar value on the H-Tax return on investment would give further ammunition to the city for justifying an expansion of the program.

We would also recommend that the application process be reorganized and simplified with an evaluation tool used to validate committee decisions and make the funding assessments more transparent. We have created such a rubric that could be adopted to assist in the evaluation process. We also recommend that the entire process be converted to an electronic online format - from the application, to the training, to the evaluation. This will reduce the amount of paper used and will increase efficiency. As outside interference from the City Council into committee affairs seems to be prevalent and at times undermines the process, a system should be put in place that allows for the City Council to maintain some control and access over funds, while giving the committee the ability to provide a valid and transparent recommendation for funding.

Training programs for applicants should be expanded. It is recommended that a series of Web seminars be developed to assist the applicants in completing their application as well as in the planning and managing of their events. A formal mentorship program should be developed to help new organizations develop their event. Effective evaluation of events utilizing consistent evaluation measures is also needed to provide critical information to the committee that could inform future funding decisions for H-Tax events. Finally, we would recommend a review of both the composition of the committee, and of the current timeline.

PURPOSE AND METHODOLOGY

The aims of this project were to: 1) evaluate the past use of H-Tax funds for events / festivals / activities through the survey collected by the H-Tax Committee; 2) measure the level of satisfaction related to the host organizations and the activity/event of current attendees of H-tax funded activities/events; 3) measure community members' perceptions of the host organizations and current H-Tax funded activities/events with specific focus on their perceived contribution to quality of life (QOL) within the Columbia community; 4) develop an assessment tool/rubric to assist the H-Tax Committee to efficiently and effectively evaluate organizations and events that receive H-Tax funding; and 5) provide recommendations to the City Council on tangible ways to improve the H-Tax process to optimize the use of funds to improve the quality of life of the community and to increase revenue by attracting additional tourists to Columbia through the use of H-Tax funds.

The following mixed-methodology research approach was used to achieve the project objectives:

1) The research team analyzed the data collected by the City Council via a questionnaire that was sent to all 2013 H-Tax fund recipients in August 2013. The research team tabulated results of the returned surveys to analyze both the quantitative and qualitative data elements based on fiscal responses, attendance, and perceived impact on the organization and community.
2) The research team conducted focus groups with the H-Tax committee members, observed the application process.
3) In-depth literature review and examination of best practices was carried out to assist the development of an assessment tool so that the committee can effectively and efficiently evaluate each of the organizations and activities/events that receive H-Tax funding. A new assessment rubric was developed accordingly to allow the committee to evaluate the applications of the organizations and events in terms of their economic and social impacts on the local community.
4) Two surveys - one for the visitors and one for community residents were developed based on the literature review and focus groups / interviews / observations. The questions aimed to examine attendees' perception and image of the events and organizations, and the influence of these events on residents' quality of life. The research team collected data at six H-Tax sponsored events/festivals during the period of March 2015 through July 2015, including the Shag Extravaganza (3/29/15), Olympia Fest (4/18/15), Black Expo (5/8/15), Rosewood Crawfish Festival (5/2/15), SC Book Festival (5/16/15), and Tasty Tomato Festival (7/18/15). Intercept method was used in these events and festivals to collect the data (see Appendix 1).

LITERATURE REVIEW AND BEST PRACTICES

The literature tends to support the use of hospitality tax dollars to promote tourism and foster community enrichment.[1] [2] One study, specifically focused on South Carolina, found that the use of tax funds for the promotion of the arts, cultural events, and other tourism-related events is a successful strategy, enabling tourism growth, while feeding a virtuous cycle that yields still greater tourism dollars for the community.[3] The study suggested, at least for smaller tourism communities, that their long-term interests are best served by allocating tourism taxes toward initiatives that will provide special reasons for visitors to come to their community. Festivals and special events seem to provide the best path for growth, leading to a healthy tourism sector that can directly and indirectly be an economic engine for the community.

Other researchers agree that investment in events and festival can be the most effective use of tax dollars.[4] [5] Special events have become one of the fastest growing types of tourist attractions, due to their uniqueness and the celebratory and festive ambience they provide, presenting visitors "the opportunity to participate in a collective experience which is distinct from the everyday life."[6] Events provide tourists a way to experience diverse cultural forms while providing the host city a hook to attract tourism revenue.[7] From a community's perspective, the literature notes that festival based tourism can generate significant economic benefits, filling local hotel rooms and restaurants while generally requiring minimal capital investment by taking advantage of existing infrastructure. In addition, from an intangible perspective, successful festivals can serve as a way to increase quality of life for residents and build community pride and cohesiveness.[8] [9] Popular events provide tourists a reason to visit thus serving as catalysts to increase demand for food and beverages, generating increased tax revenue and feeding the virtuous cycle that proponents of these taxes espouse.[10] Finally, planned events are regarded as a key element in a destination image and brand strategy.[11]

However, it has been recognized that caution must be exercised to insure that hospitality taxes are properly employed,[12] with some arguing that hospitality taxes should only be spent in consideration with their potential for attracting discretionary visitors - and that not all communities have the potential to do this successfully.[13] In addition, how well collectors of such taxes are spending these funds, remains, for the most part, unanswered.[14]

ANALYSIS OF 2013 DATA SUPPLIED BY H-TAX RECIPIENTS (DATA COLLECTED BY THE H-TAX 2004-2013 SURVEY)

In 2013, a survey was conducted by staff at the City of Columbia of the events/festivals that had received H-Tax funding between the years of 2004-2013. The questionnaire consisted of 14 questions and included both quantitative and qualitative items. Seventy-one completed surveys were analyzed. Most of the surveys had a significant amount of missing data and the respondents varied in the manner they responded to the questions. Not all events/organizations submitted data. Based on the data collected, the average amount of monies received was $65,243 ranging from $2,056 to $682,453 (see Table 1). The average attendance was 35,576 and the events/organizations indicated that 53% of the attendees were visitors. On average events/organizations had developed 13 partnerships within and around the community (see Appendix 2.1 and 2.2 for additional data on surveys).

Table 1: Descriptive analysis of key variables

Item	Mean	Median	Mode	SD
Average $ received	$65,243	$19,000	$5,000	$116,570
Average attendance	35,576	7,043	1,000	83,860
Percent of visitors	53%	50%	50%	23%
Total Partnerships	13	5	2	19

Wordle was used to generate "word clouds" from the answers to the other questions given to H-Tax recipients. The clouds give greater prominence to words that appear more frequently in the source text. Respondents indicated that they contributed to the H-Tax fund by having their attendees dine at local restaurants and stay in hotels, by attracting out of state visitors, and by partnering with local vendors (see Figure 1). Many respondents indicated that if funding was discontinued it would negatively impact their marketing efforts and could impact the size of the event and/or cause the event to be cancelled (see Figure 2).

Figure 1: Contributions to H-Tax

Figure 2: Impact if funding decreased

Events/organizations were asked how they planned on making the event/organization financially sustainable, with most indicating that they would look for alternative funding sources, search for corporate funding and expand on their current programs (see Figure 3). Respondents also indicated that they believe their event/organization contributed to the community's quality of life by providing educational opportunities, art appreciation, cultural diversity, and by building a sense of community (see Figure 4).

Figure 3: Vision for sustainable funding

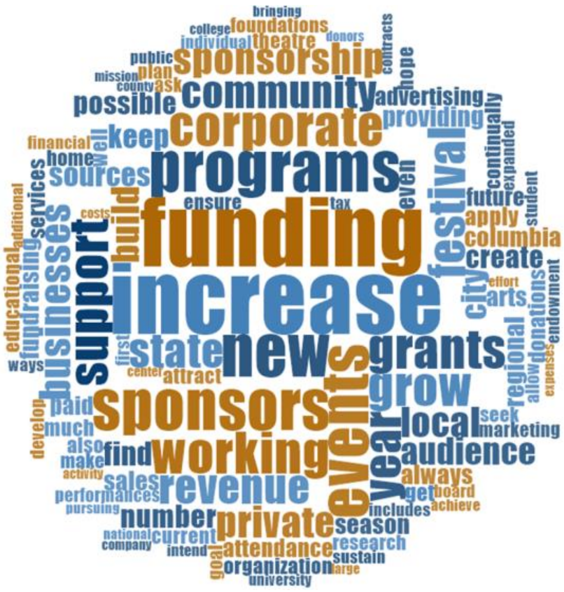


Figure 4: How event contributes to the quality of life

Finally events/organizations were asked how to improve the H-Tax process and they indicated that the timeframe needs to be revised, different standards be applied to new events/organizations, that the process should be electronic, and that the agencies funded should accomplish H-Tax goals (see Figure 5).

Figure 5: Recommendations to improve the H-Tax

QUALITATIVE DATA RESULTS

The research team conducted two focus groups with members of the H-Tax Committee – a committee that contained a few current and past applicants. Several key themes emerged from these discussions. Much conversation focused on the evaluation of applicants, a process that the committee felt was thorough and fair. Criteria taken into account include the type and location of events, past performance, the potential of the event to bring in people and revenue, the distribution of events across the community, the potential for community enrichment, and the presentation made by applicants. *"The idea is to bring tourists into Columbia that spend money in restaurants to put back into the pot. So we are looking at "Will they bring people in?" and some bring a couple hundred in and some bring several thousand people in. But it is all important just the same."*

Much discussion also centered on the involvement of the council in this process. The committee would prefer council respect committee judgments and not make political decisions (by overruling the committee's decisions). At the very least, the committee members expressed that they would like to see more respect for the competitive process and their hard work. Some suggested that this might come about if more of the council were involved in the evaluation process itself – by attending presentations for example – thus obtaining more understanding for the process. *"Personally I would like to see a strengthening in the appreciation for, respect for the competitive process, as it exists now. I think that's an important component of the way these funds are allocated."*

Members of the committee also felt improvements could be made in the education or training of applicants – before, during and after the event. In fact, a mentoring process is just being put in place to try to alleviate some of these concerns. Currently the committee offers a workshop that is intended to guide aspirants through the application process. However, attendance is not a requirement for submission of an application, and it was felt that those that really needed the guidance did not attend. *"Of course as always, the people who really needed to be there, were not there".*

Related to this last point, some discussion focused on the measures used by event organizers to gauge the success of their respective events. Given the importance of this data, it was felt that only a minority of organizers conduct robust data collection during and after their events. This then represents a problem when these events apply for funding the following year. *"So we want an actual budget and the actual attendance. You project what you think it will be right now and you see what it was last year and the year before. But what we want in the final report is real numbers: Actual budget, actual attendance. It's just difficult. There are so many free events. It is very difficult and we try to help them to figure out a way to do that. That's our challenge."*

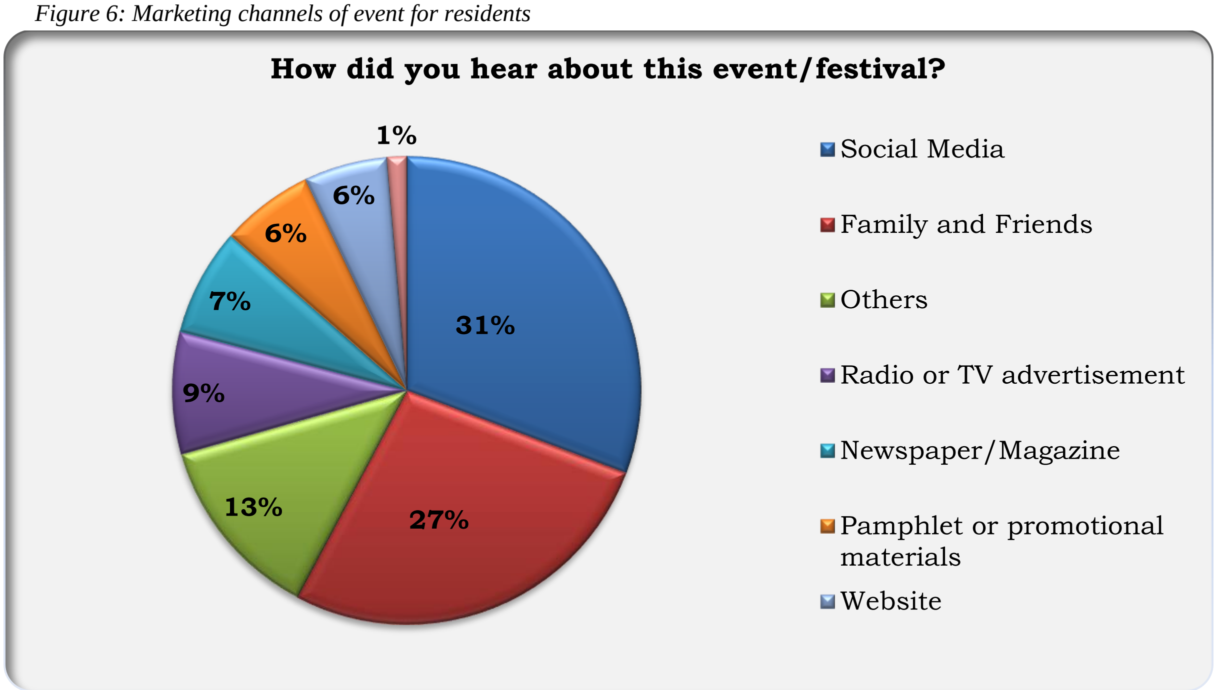
Finally, there were some committee members who felt a lack of visioning from the City of Columbia hampered the H-Tax process. *"I don't think the City of Columbia has a focus for its future and I think that's detrimental to every arts groups, every cultural group. We don't know how we can mesh together to help the city to achieve its goal. You take a small city, town like Branson, Mo. that nobody has really ever heard of and they decided to take specific genre of music and develop it as their cultural tourism package, now people know about Branson. Mo. We have nothing like that."*

DESCRIPTIVE ANALYSIS OF H-TAX (RESIDENTS) RESULTS

PART 1: EVENT EVALUATION:

Residents were asked about basic facts related to the event they were attending. According to responses, a majority of the residents had attended this event in the past (51%). Residents reported having attended approximately four events on average in Columbia last year (see Appendix 3.1). The top three reasons for attending the event were: 1) to have fun (181); 2) to enjoy relaxing entertainment (159); and 3) to support local events (157). The lowest ranked reasons for attending the event were: 1) my family likes to go there (41); 2) other (29); and 3) they charge reasonable prices (25) (see Appendix 4.1). Residents heard about the event primarily from: 1) social media (30.74%); 2) friends and family (27.03%); and 3) others (12.84%), as opposed to via: 1) a pamphlet or other promotional materials (6.42%); 2) websites (5.74%); and 3) just passed by (1.35%) (see Figure 6).

Figure 6: Marketing channels of event for residents



Residents were asked to rank their perceptions of the event on various features using a scale of one to seven. In general, residents perceived the benefits to be relatively high (mean score of 5.46 out of 7). The top perceived benefits of the event were: 1) increases the variety of entertainment in Columbia (5.97); 2) makes Columbia a more interesting place to live in (5.88); and 3) brings the community together (5.87). The lowest perceived benefits of the event were: 1) leads to the development of new facilities which can be used by local residents (5.04); 2) gives Columbia an international identity (4.91); and 3) improves the quality of local services (e.g., police, medical and utilities) in the area (4.88) (see Table 2).

Table 2: Perceived benefits to the community as reported by residents

Top ranked benefits to the community perceived by residents		**Lowest ranked benefits to the community as perceived by residents**	
Increases the variety of entertainment in Columbia, SC	5.97	Leads to the development of new facilities which can be used by local residents	5.04
Makes Columbia, SC a more interesting place to live	5.88	Gives Columbia, SC an international identity	4.91
Brings the community together	5.87	Improves the quality of local services (e.g. police, medical and utilities) in the area	4.88

On the contrary, residents perceived the drawbacks to hosting the event were on average very low (2.48 out of 7). The top perceived drawbacks were: 1) causes difficulty in parking (2.98); 2) causes traffic congestion (2.92); and 3) leads to increased litter in the area (2.86). Residents were least concerned about: 1) causes damage to the environment (2.18); 2) causes higher crime levels in the area (2.08); and 3) brings too many tourists to the area (2.04) (see Table 3).

Table 3: Perceived drawbacks by residents

Top perceived drawback of hosting event as reported by residents		**Lowest perceived drawback of hosting event as reported by residents**	
Causes difficulty in parking	2.98	Causes damage to the environment	2.18
Causes traffic congestion	2.92	Causes higher crime levels in the area	2.08
Leads to increased litter in the area	2.86	Brings too many tourists to the area	2.04

In terms of the perceived impacts of the event, residents showed a high tolerance (6.02 out of 7). The top perceived impacts were: 1) I consider myself to be tolerant of this event (6.24); 2) this event injects positive energy into the community (6.24); and 3) all things considered, the benefits of this event outweigh the costs (6.20). The lowest ranked perceived impacts were: 1) the organizers of this event are effectively managing it to minimize its negative impacts (5.99); 2) I am not personally inconvenienced by this event (5.76); and 3) the negative impacts of this event have been decreasing in recent years (5.25) (see Table 4).

Table 4: Impact that this event has on the community as perceived by residents

Top rated impacts of the event as perceived by residents		**Lowest rated impacts of the event as perceived by residents**	
I consider myself to be tolerant of this event	6.24	The organizers of this event are effectively managing to minimize its negative impacts	5.99
This event injects positive energy into the community	6.24	I am not personally inconvenienced by this event	5.76
All things considered, the benefits of this event outweigh the costs	6.20	The negative impacts of this event have been decreasing in recent years	5.25

The respondents reported a relatively high involvement in the planning and execution of the event (5.51 out of 7). Residents suggested that the event: 1) makes me want to tell others about what we have to offer in Columbia (5.87); 2) makes me feel more connected to my community (5.83); and 3) fosters a sense of 'community spirit' within me (5.80). Residents were less concerned about the following: 1) I feel like I have an outlet to share my concerns about event development in the region (5.05); 2) I feel like my vote makes a difference in how events are developed in the region (4.99); and 3) I feel like I have access to the decision making process when it comes to event development in the region (4.95) (see Table 5).

Table 5: Resident involvement in planning and execution of event

Top perceived involvement in planning and execution of event by residents		**Lowest perceived involvement in planning and execution of event by residents**	
Makes me want to tell others about what we have to offer in Columbia, SC	5.87	I feel like I have an outlet to share my concerns about event development in the region	5.05
Makes me feel more connected to my community	5.83	I feel like my vote makes a difference in how events are developed in the region	4.99
Fosters a sense of 'community spirit' within me	5.80	I feel like I have access to the decision making process when it comes to event development in the region	4.95

The overall attitude of residents toward the event/festival was very favorable (6.31). Furthermore, residents were very supportive of Columbia hosting events and festivals (6.54 out of 7).

PART 2: EVENT QUALITY AND QUALITY OF LIFE

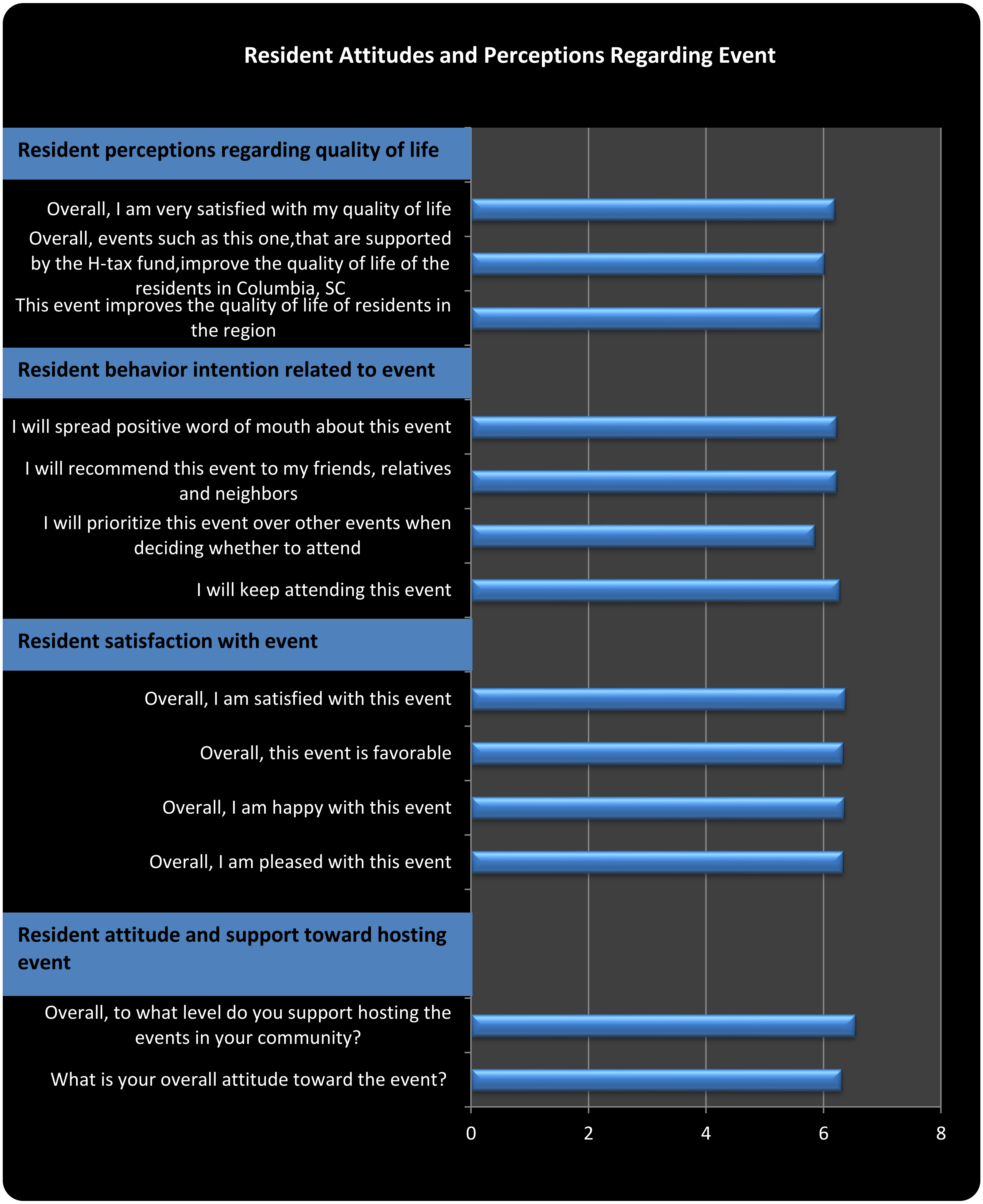
On average, residents felt that the level of quality of the event was very high (5.99 out of 7). The top three impressions were: 1) the event/festival is fun (6.31); 2) the event/festival location is appropriate for its purpose (6.20); and 3) the event/festival is well organized (6.15). The least favorable impressions were: 1) the restrooms are well maintained (5.67); 2) the prices of the event products are reasonable (5.64); and 3) the parking facility is convenient (5.51) (see Appendix 4.2).

Similarly, resident visitors were very satisfied with the event (6.35 out of 7). Specifically, they were: 1) very pleased with the event (6.33); 2) were very happy with the event (6.35); 3) perceived the event very favorably (6.33); and 4) were very satisfied with the event/festival (6.37) (see Figure 7).

Furthermore, respondents indicated a very strong behavior intention related to the event (6.14 out of 7), although it was a bit lower than the overall satisfaction score. Average responses indicate that residents are very likely to attend this event in the future (6.27). They would highly prioritize the event over other events when deciding whether to attend (6.35). They would highly recommend the event to their friends, relatives and neighbors (6.33), and they are highly likely to spread positive word of mouth messaging about the event (6.37) (see Figure 7).

Overall, residents perceived that the event improved the quality of life of the residents in the region (5.96). In terms of the events that were supported by the H-Tax fund, residents perceived that they all improve the quality of life for residents in Columbia (6.01). Finally, residents showed a very high satisfaction with their quality of life overall (6.19) (see Figure 7).

Figure 7: Resident attitudes and perceptions regarding events



PART 3: DEMOGRAPHICS

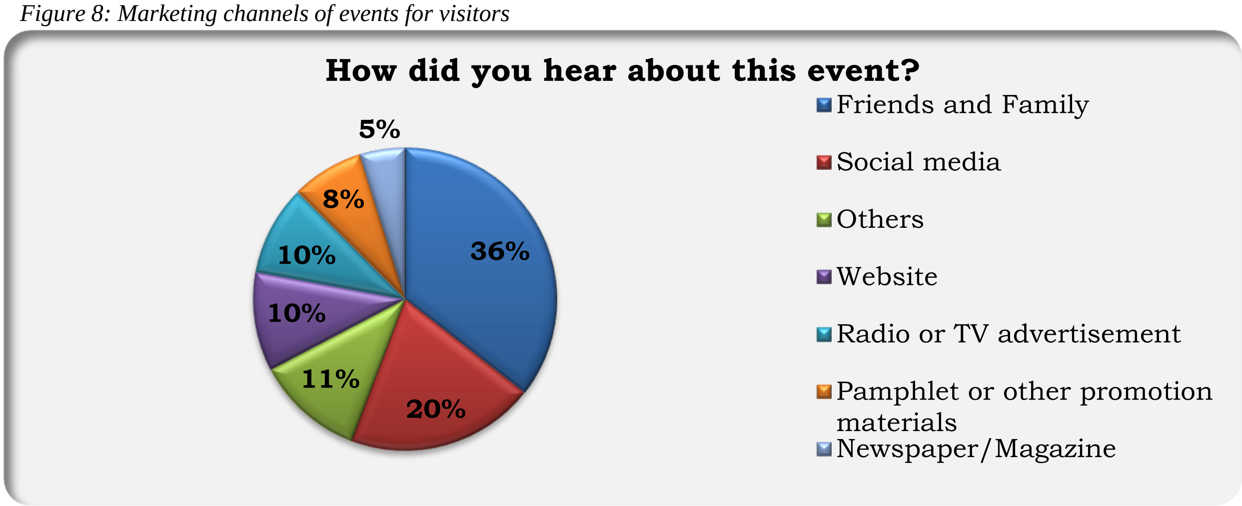
Resident survey respondents were predominantly female (67%), married (42%), rather than single (39%), or widowed, divorced or separated (19%). The respondents were mainly Caucasian (62%). Age ranges of respondents included the single largest group of 21-40 years old (44%), followed by 41-60 years old (30%), 61 years and older (16%), and the smallest group, 20 years old and younger (2%). The mean age was 43 years old, and the mean length of residence was 21 years. The majority of respondents reported earning a Bachelor's degree (33%), followed by a Masters or Doctoral degree (31%), some college or Associate degree (26%), and a high school degree or lower (8%). The reported 2014 annual household income were mainly distributed between $20,000 - $60,000. The majority of respondents were employed full-time (64%) (see Appendix 5.1).

DESCRIPTIVE ANALYSIS OF THE H-TAX (VISITORS) RESULTS

PART 1: EVENT EVALUATION

Visitors were asked about basic facts related to their event. According to responses, a majority of the visitors had attended an event in the past (90.5%), and most visitors attended approximately one to three events (70.3%) in Columbia last year (see Appendix 3.2). Moreover, 77.9% of the visitors reported that their main purpose for this trip to Columbia was to attend this event. The top three reasons for attending the event were: 1) to have fun (70.10%); 2) to enjoy relaxing entertainment (61.0%); 3) to meet people (48.6%); and 4) to enjoy a friendly atmosphere (48.6%). The lowest ranked reasons for attending the event were: 1) cultural improvement (18.2%); 2) my family likes to go there (18.2%); and 3) other (18.2%) (see Appendix 4.3). Visitors heard about the event primarily from: 1) friends and family (48.10%); 2) social media (27.30%); and 3) others (15.60%), rather than: 1) a pamphlet or other promotional materials (10.40%); 2) newspaper/magazine (6.50%); or 3) just passed by (0.00%) (see Figure 8).

Figure 8: Marketing channels of events for visitors



On average, visitors felt that the level of quality of the event was relatively high (5.73 out of 7). The top three impressions were: 1) the event is fun (5.95); 2) the event area is clean (5.94); 3) the event is well organized (5.87); and 4) the event location is appropriate for its purpose (5.87). The least favorable impressions were: 1) the signage enhanced my understanding of event information and directions (5.57); 2) the parking facility was convenient (5.53); and 3) the products (souvenirs, food) offered at the event are varied (5.37) (see Appendix 4.4).

Overall, visitors reported a relatively high image of the event they attended (6.31 out of 7). Visitors felt that the event in Columbia was 1) pleasant (6.14), 2) friendly (6.07), and 3) relaxing (6.0) while the lowest rated items included 1) attractive (5.92), 2) diverse (5.79) or 3) arousing (5.65) (see Appendix 4.5).

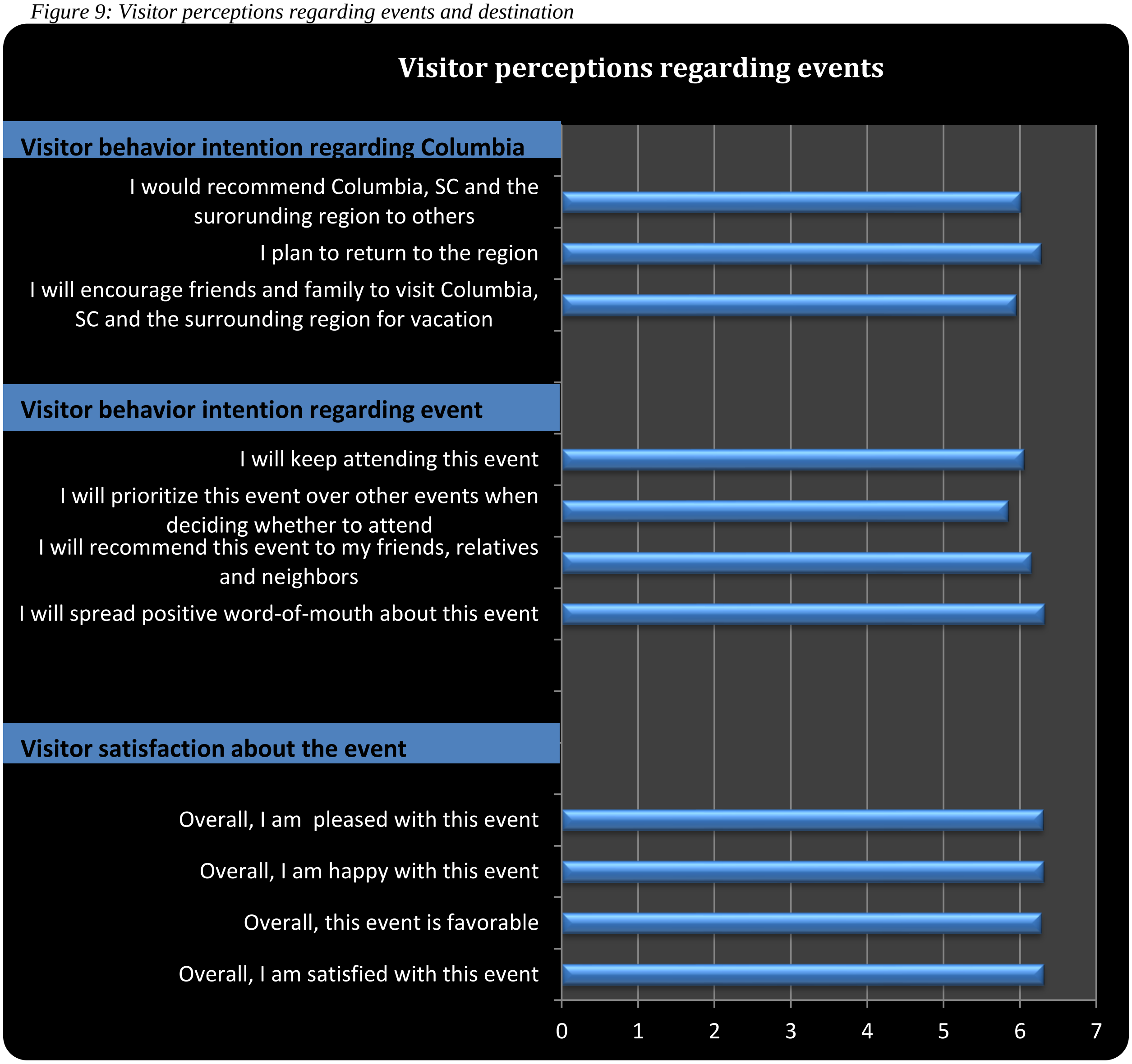
Visitors reported that the top three reasons for making the event attended memorable were 1) the local people are friendly (6.09), 2) I am interested in the main activities of this trip experience (6.07), and 3) my current trip experience in Columbia is exciting (5.97) while the lowest three rated items were: 1) I am experiencing something new (5.09); 2) my current trip experience is different from previous experiences (5.05); or 3) my current trip in Columbia is a once-in-a lifetime experience (4.56) (see Appendix 4.6).

Furthermore, visitors reported being very satisfied with the event (6.30 out of 7). Specifically, they were: 1) very pleased with the event (6.30); 2) were very happy with the event (6.31); 3) perceived the event very favorably (6.28); and 4) were very satisfied with the event (6.31) (see Figure 9).

As expected, visitor respondents indicated a very strong behavior intention related to the event (6.09 out of 7), although it was a bit lower than the overall satisfaction score. Average responses indicate that residents are very likely to attend this event in the future (6.05). They would highly prioritize the event over other events when deciding whether to attend (5.84). They would highly recommend the event to their friends, relatives and neighbors (6.15), and they are highly likely to spread positive word of mouth messaging about the event (6.32) (see Figure 9).

Visitors indicated a very strong behavior intention related to Columbia and its surrounding regions, where these events were held (6.08 out of 7). Average responses indicate that visitors plan to return the region in the future (6.01). They would highly recommend Columbia and the surrounding region to others (6.27) and they will encourage friends and family to visit Columbia and the surrounding region for a vacation (5.95) (see Figure 9).

Figure 9: Visitor perceptions regarding events and destination

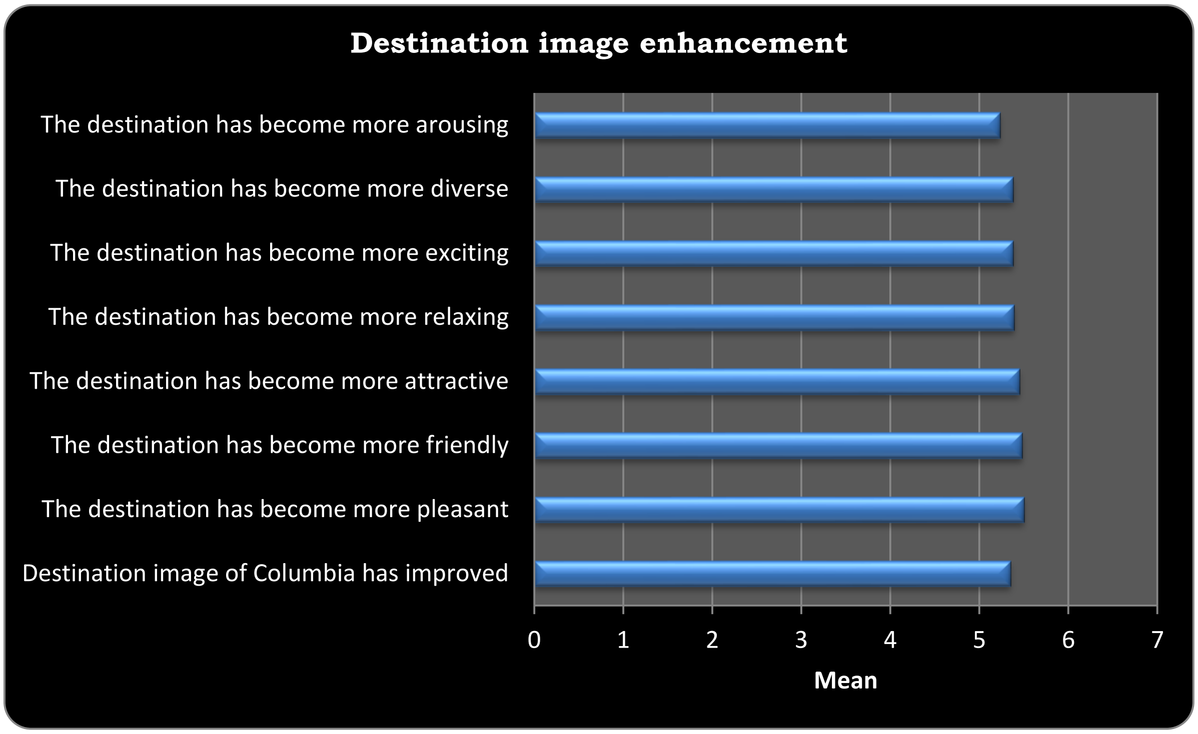


PART 2: DESTINATION IMAGE ENHANCEMENT

Overall, visitors perceived that the event image was congruent with the destination image of Columbia (5.65 out of 7). Specifically, visitors thought the image of the event and image of Columbia and the surrounding region are similar (5.53); the image of the event and image of Columbia and surrounding region are consistent (5.65); and the image of the event and image of Columbia and surrounding region are fit (5.77) (see Appendix 4.7).

Furthermore, visitors perceived that the events, supported by the hospitality tax fund, improved the overall destination image of Columbia and the surrounding region (5.35 out of 7). Specifically, these events make the destination more pleasant (5.50), friendly (5.48), attractive (5.45), relaxing (5.39), exciting (5.38), diverse (5.38), and arousing (5.23) (see Figure 10).

Figure 10: Destination Image Enhancement



PART 3: DEMOGRAPHICS

The total sample size of visitors survey was 81, of which 4 were invalid, thus 77 questionnaires entered the formal data analysis. The demographics of the sample are captured in Appendix 5.2. There were more female (67.1%) than male (32.9%) respondents surveyed. More than two-thirds (68.9%) of participants are Caucasian; around one-fourth (24.3%) are African-American; and the remainder are Hispanic, Multi-racial and Asian (6.8%). The educational level of participants was considered highly educated with 60.8% of participants having achieved either a Bachelor's degree or a Master's or Doctoral degree. 31.1% achieved some college or an Associate Degree, with the remaining 8.1% representing those who have their high school diploma. Most of the participants are married (53.9%), while 23.7% are single and have never been married before. The remaining 22.4% are widowed, divorced, or separated. Regarding age, slightly more than half (52.2%) of the sample are between the age between 50 and 68, followed by the age groups of 18-37 and 38-49, with the same proportion of 17.4%. The remaining respondents are over 68 years of age (13%). In terms of the annual household income, the sample is averagely distributed between the income groups below $150,000, however, only 4.6% of the respondents have an annual household income over $150,000. As for the respondent's occupational status, most are employed full-time (45.3%), followed by the retired (28.0%) and those employed part-time (14.7%), while respondents that are temporarily unemployed/looking for work, student and other occupations make up a relatively small proportion with 12% of the total (see Appendix 5.2).

RECOMMENDATIONS

OVERALL RECOMMENDATIONS

The data strongly indicates that participants are extremely satisfied with the events funded by the H-Tax dollars and that the events significantly increase the image of Columbia, SC. The most important recommendation we can provide based on the data collected is that funding should be continued, and if possible additional events should be developed and funded. It was clear that both residents and visitors had experienced a very high level of satisfaction with the events, and the events also increase the visibility and reputation of the city.

- Overall participants were very satisfied with the events. However, two areas of concern surfaced that require additional resources and training: parking and traffic congestion. Event organizers need increased support to develop more efficient parking plans and provide a clearer understanding of the traffic patterns. It is recommended that organizers be provided with options and training on alternative transportation methods.

- Residents indicated a relatively high level of involvement in the planning and execution of the events. However the lowest ranked item was "I feel like I have access to the decision making process when it comes to event development". Systems should be developed to not only involve but also to actively engage and empower residents to provide input and be a part of the decision making process of Columbia area events. This would start by ensuring that decisions made are transparent and valid. Residents should be invited to attend planning meetings and be encouraged to provide their input when developing new events for the community.

- It is clear from the results of the resident survey, that the events increased residents' perception of their quality of life and enhanced the liveability of the community. We believe this information should be used to market the city and should be shared with the community. The community should be proud of its events and they should be "a selling point" to attract new residents and new businesses to the city.

- The results of the surveys indicate that the events were a major attractor to visitors. Eighty percent of the respondents to the visitor survey indicated that the main reason for traveling to Columbia was because of the event; none of them were just "passing by". This provides a strong justification for the continued funding of these types of events, and if possible, an increase in funding to help attract more visitors to the community.

- Marketing and promotion are critical to event success. One area that should be given special attention and should be included in the applicant training sessions is the use of social media as a primary marketing tool. Social media ranked as the highest method used by residents and as the second highest method used by visitors to get information about the events. We believe this will only increase in the future, while the use of pamphlets and other printed promotional materials will reduce in significance as communication tools.

APPLICATION PROCESS

Observations indicate that the evaluation process of applicants is currently cumbersome and inefficient. We would recommend that the application process be reorganized and simplified. First, we recommend that one staff person and/or intern be dedicated to managing the application process. This person will track the applications, track the organizations that receive funding, compile the critical data in a concise format, and then forward the information needed to assist the committee in making funding decisions. This pre-planning on the front end should lead to a more efficient process throughout. Further, the committee should consider implementing tools that would serve to justify their decisions and help control some of the political interferences of the past.

We recommend that once an application has been completed, the assigned point person should create a standardized informational sheet, a ‘cheat sheet’ if you will, for each organization that allows the committee members and City Council the ability to quickly review the critical information about the organization and easily compare organizations using these consistent measures. In addition to the preliminary work (training participation, history of funding, past attendance etc.) and this ‘cheat sheet’, an evaluation tool should be created to validate committee decisions and make the funding decisions more transparent. With this in mind, we have created a rubric that could be adopted to assist in the evaluation process (see Appendix 6). The rubric is composed of 5 major criteria and weighted based on the data we collected, past research and best practices. We propose that those 5 categories include: Application and Training, Organization Qualities and Feasibility of Event Plan, Economic Impact, Community Enrichment and Budget/Use of Funds.

One of the primary goals of the H-Tax is to bring visitors to the city to ‘replenish the pot’ to stimulate the local economy leading to sustainable economic development. However, it is noted that the definition of “tourist” as defined by the city is currently inconsistent with the nationally designated definition of “tourist.” Currently, the accepted definition of tourist by the city is an individual who has traveled outside of the district where they reside, but the standard definition of “tourist” is limited to those traveling at least 50 miles from their usual environment or for an overnight stay (regardless of travel). For an accurate assessment of the numbers of tourists drawn to the city through H-Tax supported event, the definition of “tourist” must be congruent with the national standard.

During the process of evaluation we recommend that:

- Applications should be numbered and reviews should be made anonymous, if possible. Reviewers should not be provided with the name of the applicant or the applicant organization. The evaluation should be based on the merit of the application and the documents received only.

- To maintain integrity and reduce any perceived conflict of interest, the highest and lowest scores submitted by the reviewers should be dropped from the scoring total and an average score should be calculated based on the remaining reviews.

- Applications receiving a score of exemplary (80 to 101) should receive between 75% and 100% of their requested funding amount; applicants receiving a fair score (60 to 79) 74% to 50% of their requested funding amount; and applications that receive a poor score between (0 to 59) 0% to 49% of the requested funds.

- We believe that the initial evaluation of funding should be determined <u>before</u> the interviews. Once all the applications are submitted, the committee should evaluate each application prior to the interview phase. After the applications are reviewed and scored, a mean score should be calculated for each application. The application score also should be provided to the committee before the interview phase. This will allow the committee to see how the applicant ranks among the application pool. This will help each committee member develop focus and targeted questions during the interview phase based on the strengths or weaknesses of the application submitted.

- The application and rubric should be in an electronic format and created to be user-friendly with drop-down menus, pre-populated inputs and programming that will calculate raw scores into averages. These electronic documents should be linked to collate data and avoid the need to re-enter data. This protocol will help to ensure that the evaluations are de-identified and confidential.

- A standard system or set of questions/criteria should be utilized during the interview process to evaluate the applicants. We would recommend that the committee provide the organizations with a set script or guidelines that they should follow when they present to the committee during the interview. This will make it easier to evaluate each group uniformly given that they will likely present different material.
- We recommend that the entire process be converted to an electronic online format - from the application, to the training, to the evaluation. This will reduce the amount of paper used and will increase efficiency. A tracking database should be created that includes

each organization's information. The database can then be used to track historical data, and be used to compare between years and amongst organizations. In fairness to organizations that do not have a computer or internet access, the committee should provide a number of alternative options for access such as: provide a list of public computer terminals available around the city; provide an opportunity to borrow a laptop; or have a space within the city offices where the applicant can come to complete the application.

- Applications should be categorized in clusters, organized based on both the type of activity and the size of the event. Each cluster should have clear evaluation criteria, and those criteria should be public information.
- As outside interference from the city council into committee affairs seems to be prevalent and at times undermines the process, a system should be put in place that allows for the city council to maintain some control and access over funds, while giving the committee the ability to provide a valid and transparent recommendation for funding. One recommended solution would be to set aside a portion of the funds at the beginning of the funding period for the council to use as discretionary funds to support H-Tax projects/events that they deem worthy. The remaining funds should be distributed in a transparent and equitable manner based on the established set of criteria/standards.

TRAINING

- Training programs for applicants should be expanded. It is recommended that a series of Web seminars be developed to assist the applicants in completing their application as well as in the planning and managing of their events. Seminars should include topics such as how to successfully complete the application, how to properly track the number of attendees (residents and tourists) of an event, how to develop local partnerships within the community, how to measure the impacts (economic, cultural, and environmental) of the event on the community, and how to move towards a financially sustainable event. At least one face-to-face training workshop should also be offered in the community during the application period to answer specific questions not addressed in the webinars.

- A formal mentorship program should be developed to help new organizations develop their events. The mentorship program should connect well established organizations/events with new and/or developing organizations/events to help provide them with tools and guidance to improve and enhance the events in Columbia.

- Effective evaluation of events utilizing consistent evaluation measures would provide critical information to the committee that could inform future funding decisions for H-Tax events. A document should be produced that acts as a guide for these organizations to implement an effective evaluation and required for each organization accepting H-Tax funds. An example is one produced by the Georgia Council for the Arts used for arts organizations in Georgia (see Appendix 7). The focus of this document is on evaluation – how to collect relevant data, how to analyze it etc.

FINAL THOUGHTS TO CONSIDER

The selection committee appears to be comprised of many well-qualified individuals from diverse backgrounds representing the constituents of Columbia. However, for optimal efficiency for group consensus/decision making, we would recommend that a maximum of 7 members that represent the various sectors (i.e. hospitality, arts and culture, economic development, etc.) serve on the selection committee. In order for the selection committee to remain objective, a specific protocol for selecting committee members could be developed and adopted, thus eliminating any potential conflicts of interest.

The Council and the H-Tax Committee may want to consider discussing a revised timeline. Both H-Tax recipients and some committee members expressed dissatisfaction with the current timeline. Some suggested that organizations are not hosting events in July and August just because of the way decisions on funding are currently made, and this is detrimental to the city given the obvious importance of events and festivals for improving the image of Columbia.

Finally, City Council should consider commissioning a comprehensive economic impact study that would put a dollar value on the H-Tax return on investment, a study that could be replicated every five years. Such a study would give further ammunition to the city for justifying an expansion of the program. It is clear that events and organizations supported by the H-Tax are enhancing the quality of life for residents of Columbia, but unknown is the economic impact of the program. Given previous studies of this nature, one could anticipate seeing at least a 10:1 return on investment on dollars allocated. [15, 16, 17]

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UNIVERSITY OF SOUTH CAROLINA

Event Evaluation Survey
Resident

The SmartState Center of Economic Excellence in Tourism and Economic Development at the University of South Carolina is an **independent** research organization seeking your views about effectiveness of events sponsored by Hospitality Tax in Columbia, South Carolina.

We would appreciate you taking approximately   minutes to provide your honest feedback and input. Your opinions are very important to us and all responses are anonymous. Thank you!

PART 1: EVENT EVALUATION

1. Have you attended this event/festival in the past?

1. Yes
2. No

2. Approximately, how many events/festivals in Columbia, SC did you attend last year?

1. ___________

3. Which of following describes your reasons for attending this event/festival? (please circle all that apply)

1) Relaxing entertainment	2) Do something special	3) Be part of community
4) Support local events	5) Meeting people	6) Spending time as a family
7) Friendly atmosphere	8) Have fun	9) Eating and drinking
10) Active involvement in the event	11) Cultural improvement	12) Close to where I live
13) They charge reasonable prices	14) I like the activities they offer	15) My family likes to go there
16) Other (Please specify) __________________		

4. How did you hear about this event/festival?

1) Social media (such as Facebook, Twitter, and Intagram)
2) Website
3) Pamphlet or other promotion materials
4) Radio or TV advertisement
5) Friends and Family
6) Just passed by
7) Newspaper/Magazine
8) Others (Please Specify)______________

5. **The following questions are about the benefits of this event/festival in your community. Please tell us how much you agree or disagree with each statement.** ***(1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)***

This event/festival…	**Strongly Disagree**			**Neutral**			**Strongly Agree**
a. Provides employment opportunities in the community	1	2	3	4	5	6	7
b. Increases personal income of local residents	1	2	3	4	5	6	7
c. Increases trade for local businesses	1	2	3	4	5	6	7
d. Promotes Columbia, SC as a tourism destination	1	2	3	4	5	6	7
e. Improves the appearance of the area	1	2	3	4	5	6	7
f. Improves the quality of local services (e.g., police, medical and utilities) in the area	1	2	3	4	5	6	7
g. Makes Columbia, SC a more interesting place to live in	1	2	3	4	5	6	7
h. Increases the pride of local residents in their community	1	2	3	4	5	6	7
i. Leads to the development of new facilities which can be used by local residents	1	2	3	4	5	6	7
j. Leads to a wider range of goods available in the shops	1	2	3	4	5	6	7
k. Brings the community together	1	2	3	4	5	6	7
l. Leads to higher levels of service offered by local businesses	1	2	3	4	5	6	7
m. Enhances local residents' spirit of hospitality	1	2	3	4	5	6	7
n. Gives residents an opportunity to meet new people	1	2	3	4	5	6	7
o. Increases the awareness/recognition of the local culture	1	2	3	4	5	6	7
p. Increases the variety of entertainment in Columbia, SC	1	2	3	4	5	6	7
q. Improves the understanding of different people and cultures by residents	1	2	3	4	5	6	7
r. Gives Columbia, SC an international identity	1	2	3	4	5	6	7

6. **The following statements are about the costs of this event in your community. Please tell us how much you agree or disagree with each statement.** ***(1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)***

The event/festival…	**Strongly Disagree**			**Neutral**			**Strongly Agree**
a. Is a burden for me due to the hospitality tax collected for investing in this event	1	2	3	4	5	6	7
b. Diverts public funds from more worthwhile projects	1	2	3	4	5	6	7
c. Brings too many tourists to the area	1	2	3	4	5	6	7
d. Leads to higher rents for local residents due to the high demand for accommodation during the event	1	2	3	4	5	6	7
e. Increases prices in shops	1	2	3	4	5	6	7
f. Inflates real estate prices	1	2	3	4	5	6	7
g. Causes damage to the environment	1	2	3	4	5	6	7
h. Increases noise levels	1	2	3	4	5	6	7
i. Causes difficulty in parking	1	2	3	4	5	6	7
j. Leads to increased litter in the area	1	2	3	4	5	6	7
k. Visitors to event are inconsiderate of local residents	1	2	3	4	5	6	7
l. Causes traffic congestion	1	2	3	4	5	6	7

	1	2	3	4	5	6	7
m. Causes overcrowding and makes it difficult to use local facilities	**1**	**2**	**3**	**4**	**5**	**6**	**7**
n. Causes higher crime levels in the area	**1**	**2**	**3**	**4**	**5**	**6**	**7**

7. Please indicate how you feel about the impacts of this event/festival has on the community. (1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)

	Strongly Disagree			**Neutral**			**Strongly Agree**
a. I am not personally inconvenienced by this event	**1**	**2**	**3**	**4**	**5**	**6**	**7**
b. This event does not disrupt my routine	**1**	**2**	**3**	**4**	**5**	**6**	**7**
c. The local economy benefits from this event	**1**	**2**	**3**	**4**	**5**	**6**	**7**
d. Local residents have as much right as other tourists to enjoy themselves in this event	**1**	**2**	**3**	**4**	**5**	**6**	**7**
e. The organizers of this event are effectively managing it to minimize its negative impacts	**1**	**2**	**3**	**4**	**5**	**6**	**7**
f. It is logical for Columbia, SC to host this event	**1**	**2**	**3**	**4**	**5**	**6**	**7**
g. I consider myself to be tolerant of this event	**1**	**2**	**3**	**4**	**5**	**6**	**7**
h. All things considered, the benefits of this event outweigh the costs	**1**	**2**	**3**	**4**	**5**	**6**	**7**
i. The negative impacts of this event have been decreasing in recent years	**1**	**2**	**3**	**4**	**5**	**6**	**7**
j. This event injects positive energy into the community	**1**	**2**	**3**	**4**	**5**	**6**	**7**

8. Please indicate your involvement in planning and execution of the event/festival. (1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)

This event/festival…	**Strongly Disagree**			**Neutral**			**Strongly Agree**
a. Makes me proud to be from the region	**1**	**2**	**3**	**4**	**5**	**6**	**7**
b. Makes me feel special because people travel to see the unique features of my home community	**1**	**2**	**3**	**4**	**5**	**6**	**7**
c. Makes me want to tell others about what we have to offer in Columbia, SC	**1**	**2**	**3**	**4**	**5**	**6**	**7**
d. Reminds me that I have a unique culture to share with visitors	**1**	**2**	**3**	**4**	**5**	**6**	**7**
e. Makes me want to work to keep Columbia SC special	**1**	**2**	**3**	**4**	**5**	**6**	**7**
f. Makes me feel more connected to my community	**1**	**2**	**3**	**4**	**5**	**6**	**7**
g. Fosters a sense of ‘community spirit’ within me	**1**	**2**	**3**	**4**	**5**	**6**	**7**
h. I feel like I have a voice in regional event/festival development decisions	**1**	**2**	**3**	**4**	**5**	**6**	**7**
i. I feel like I have access to the decision making process when it comes to event development in the region	**1**	**2**	**3**	**4**	**5**	**6**	**7**
j. I feel like my vote makes a difference in how events/festivals are developed in the region	**1**	**2**	**3**	**4**	**5**	**6**	**7**
k. I feel like I have an outlet to share my concerns about event development in the region	**1**	**2**	**3**	**4**	**5**	**6**	**7**

9. What is your overall attitude toward this event/festival?

Extremely Unfavorable			Neutral			Extremely Favorable
1	2	3	4	5	6	7

10. Overall, what is your level of support for hosting this event/festival in Columbia, SC?

Strongly Oppose			Neutral			Strongly Support
1	2	3	4	5	6	7

PART 2: EVENT QUALITY AND QUALITY OF LIFE

1. For each description listed below, circle the number to the right that best describes your perceptions on the event/festival quality. (1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)

	Strongly Disagree			Neutral			Strongly Agree
a. The event/festival is fun	**1**	**2**	**3**	**4**	**5**	**6**	**7**
b. The event/festival staff provides good visitor information	**1**	**2**	**3**	**4**	**5**	**6**	**7**
c. The prices of the event products are reasonable	**1**	**2**	**3**	**4**	**5**	**6**	**7**
d. The event/festival is well organized	**1**	**2**	**3**	**4**	**5**	**6**	**7**
e. The promotional advertisements are well prepared	**1**	**2**	**3**	**4**	**5**	**6**	**7**
f. The event/festival is well managed	**1**	**2**	**3**	**4**	**5**	**6**	**7**
g. The signage enhanced my understanding of information and directions	**1**	**2**	**3**	**4**	**5**	**6**	**7**
h. The event/festival products are high-quality	**1**	**2**	**3**	**4**	**5**	**6**	**7**
i. The event/festival is varied.	**1**	**2**	**3**	**4**	**5**	**6**	**7**
j. The parking facility is convenient	**1**	**2**	**3**	**4**	**5**	**6**	**7**
k. The restrooms are well maintained	**1**	**2**	**3**	**4**	**5**	**6**	**7**
l. The event/festival area is clean	**1**	**2**	**3**	**4**	**5**	**6**	**7**
m. The surrounding environment is great	**1**	**2**	**3**	**4**	**5**	**6**	**7**
n. The event/festival location is appropriate for its purpose	**1**	**2**	**3**	**4**	**5**	**6**	**7**
o. The products (souvenirs, food) offered at the event/festival are varied	**1**	**2**	**3**	**4**	**5**	**6**	**7**
p. The experiential event/festival is wonderful	**1**	**2**	**3**	**4**	**5**	**6**	**7**
q. The public space is organized.	**1**	**2**	**3**	**4**	**5**	**6**	**7**
r. The event/festival area is beautiful	**1**	**2**	**3**	**4**	**5**	**6**	**7**

2. **For each description listed below, circle the number to the right that best describes your satisfaction about this event. (1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)**

	Strongly Disagree			Neutral			Strongly Agree
a. Overall, I am pleased with this event/festival	**1**	**2**	**3**	**4**	**5**	**6**	**7**
b. Overall, I am happy with this event/festival	**1**	**2**	**3**	**4**	**5**	**6**	**7**
c. Overall, this event/festival is favorable	**1**	**2**	**3**	**4**	**5**	**6**	**7**
d. Overall, I am satisfied with this event/festival	**1**	**2**	**3**	**4**	**5**	**6**	**7**

3. **For each description listed below, circle the number to the right that best describes your behavior intention about this event. (1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)**

	Strongly Disagree			Neutral			Strongly Agree
a. I will keep attending this event/festival	**1**	**2**	**3**	**4**	**5**	**6**	**7**
b. I will prioritize this event/festival over other events when deciding whether to attend	**1**	**2**	**3**	**4**	**5**	**6**	**7**
c. I will recommend this event/festival to my friends, relatives and neighbors	**1**	**2**	**3**	**4**	**5**	**6**	**7**
d. I will spread positive word of mouth about this event/festival	**1**	**2**	**3**	**4**	**5**	**6**	**7**

4. **This event/festival improves the quality of life of residents in the region?**

Strong Disagree			**Neutral**			**Strongly Agree**
1	2	3	4	5	6	7

5. **Overall, events/festivals such as this one, that are supported by hospitality tax fund, improve the quality of life of resident in the Columbia SC.**

Strong Disagree			**Neutral**			**Strongly Agree**
1	2	3	4	5	6	7

6. **Overall, taking everything into account, I am very satisfied with my quality of life.**

Strong Disagree			**Neutral**			**Strongly Agree**
1	2	3	4	5	6	7

PART 3: DEMOGRAPHICS

1. **Please indicate your current residency zip code: _______________**

2. **What is your gender?** 1) Male 2) Female

3. **What year were you born? _______________**

4. **How many years have you lived in the region? _______________**

5. **What is your marital Status?**

   1) Single (never married) 2) Married 3) Widowed/Divorced/Separated

6. **What is your ethnic group?**

   1) Caucasian 2) African-American 3) Hispanic 4) Asian
   5) Native American 6) Multi-racial 7) Other *(please specify)*:___________

7. **What is the highest level of education you have completed? Please mark only one.**

   1) High school degree or lower 2) Some college or Associate degree
   3) Bachelor's degree 4) Master/Doctorate degree

8. **Total 2014 annual household income:**

   1) Less than $20,000 2) $20,000-$40,000 3) $40,001-$60,000
   4) $60,001-80,000 5) $80,001-$100,000 6) $100,001-$150,000
   7) $150,001 - $200,000 8) $200,001 - $300,000 9) $300,001 or above

9. **What is your current employment status?**

   1) Employed full-time
   2) Employed part-time
   3) Homemaker/housewife
   4) Temporarily unemployed/looking for work
   5) Retired
   6) Student
   7) Other (Please specify)___________________

10. **Do you have any other views about the event/festival? Please feel free to write about them.**

____
____
____
____

11. **Do you have any other views about the event/festival? Please feel free to write about them.**

____
____
____
____

THANK YOU FOR COMPLETING THE SURVEY

UNIVERSITY OF SOUTH CAROLINA

Event Evaluation Survey
Visitor

The SmartState Center of Economic Excellence in Tourism and Economic Development at the University of South Carolina is an **independent** research organization seeking your views about effectiveness of events sponsored by Hospitality Tax in Columbia, South Carolina.

We would appreciate you taking approximately 15 minutes to provide your honest feedback and input. Your opinions are very important to us and all responses are anonymous. Thank you!

PART 1: TRIP QUESTIONS

1. **In the past year, including this trip how many times have you visited Columbia in South Carolina?**
   1) 1 time
   2) 2-3 times
   3) 4-5 times
   4) More than 5 times

2. **In the past year, how many times have you attended an event/festival in Columbia, SC?** ______________

3. **How many days/nights do you plan to stay in Columbia for this trip?**
   ______________ **Days**
   _______________**Nights**

4. **What's your main purpose for this trip to Columbia?**
   1) Attending this event/festival 2) Others (non-related to this event/festival)

5. **Which of following describes your reason for attending this event/festival? (please circle all that apply)**

1) Relaxing entertainment	2) Do something special	3) Be part of community
4) Support local events	5) Meeting people	6) Spending time as a family
7) Friendly atmosphere	8) Have fun	9) Eating and drinking
10) Active involvement in the event	11) Cultural improvement	12) Close to where I live
13) They charge reasonable prices	14) I like the activities they offer	15) My family likes to go there
16) Other (Please specify) __________________		

6. **How did you hear about this event/festival?**
   1) Social media (such as Facebook, Twitter, and Instagram) 2) Website
   3) Pamphlet or other promotion materials 4) Radio or TV advertisement
   5) Friends and Family 6) Just passed by
   7) Newspaper/Magazine 8) Others (Please Specify)______________

PART 2: EVENT EVALUATION

1. **For each description listed below, circle the number to the right that best describes your perceptions on the event quality.** ***(1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)***

	Strongly Disagree			Neutral			Strongly Agree
a. The event/festival is fun	1	2	3	4	5	6	7
b. The event/festival staff provides good guidance services	1	2	3	4	5	6	7
c. The prices of the event products are reasonable	1	2	3	4	5	6	7
d. The event/festival is well organized	1	2	3	4	5	6	7
e. The promotional advertisements are well prepared	1	2	3	4	5	6	7
f. The event/festival is well managed	1	2	3	4	5	6	7
g. The signage enhanced my understanding of information and directions	1	2	3	4	5	6	7
h. The event/festival products are high-quality	1	2	3	4	5	6	7
i. The event/festival is varied	1	2	3	4	5	6	7
j. The parking facility is convenient	1	2	3	4	5	6	7
k. The restrooms are well maintained	1	2	3	4	5	6	7
l. The event/festival area is clean	1	2	3	4	5	6	7
m. The surrounding environment is great	1	2	3	4	5	6	7
n. The event/festival location is appropriate for its purpose	1	2	3	4	5	6	7
o. The products (souvenirs, food) offered at the event/festival are varied	1	2	3	4	5	6	7
p. The experiential event/festival is wonderful	1	2	3	4	5	6	7
q. The public space is organized	1	2	3	4	5	6	7
r. The event/festival area is beautiful	1	2	3	4	5	6	7

2. **What's your impression of this event image? Please circle the corresponding number for each word set that you feel best describes the image of this event you are attending now (for example,** ***1 = boring, and 7= exciting*****).**

Boring	1	2	3	4	5	6	7	Exciting
Distressing	1	2	3	4	5	6	7	Relaxing
Snobbish	1	2	3	4	5	6	7	Friendly
Plain	1	2	3	4	5	6	7	Diverse
Sleepy	1	2	3	4	5	6	7	Arousing
Unattractive	1	2	3	4	5	6	7	Attractive
Unpleasant	1	2	3	4	5	6	7	Pleasant

3. On a scale of 1 to 7, what is your overall image of this event you are attending now?

Least Favorable			Neutral			Most Favorable
1	2	3	4	5	6	7

4. Thinking about your current trip in Columbia SC, please indicate the extent to which you agree or disagree with each of the following statements. (*1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)*.

	Strongly Disagree			Neutral			Strongly Agree
a. I am thrilled about having a new experience in Columbia, SC	**1**	**2**	**3**	**4**	**5**	**6**	**7**
b. I am indulged in the activities participated	**1**	**2**	**3**	**4**	**5**	**6**	**7**
c. I really enjoyed this tourism experience in Columbia, SC	**1**	**2**	**3**	**4**	**5**	**6**	**7**
d. My current trip experience in Columbia is exciting	**1**	**2**	**3**	**4**	**5**	**6**	**7**
e. My current trip in Columbia is a once-in-a lifetime experience	**1**	**2**	**3**	**4**	**5**	**6**	**7**
f. My current trip experience is unique	**1**	**2**	**3**	**4**	**5**	**6**	**7**
g. My current trip experience is different from previous experiences	**1**	**2**	**3**	**4**	**5**	**6**	**7**
h. I am experiencing something new	**1**	**2**	**3**	**4**	**5**	**6**	**7**
i. I have good impressions about the local people	**1**	**2**	**3**	**4**	**5**	**6**	**7**
j. I am closely experienced the local culture	**1**	**2**	**3**	**4**	**5**	**6**	**7**
k. The local people are friendly	**1**	**2**	**3**	**4**	**5**	**6**	**7**
l. My trip experience is liberating	**1**	**2**	**3**	**4**	**5**	**6**	**7**
m. I enjoyed a sense of freedom	**1**	**2**	**3**	**4**	**5**	**6**	**7**
n. My trip experience is refreshing	**1**	**2**	**3**	**4**	**5**	**6**	**7**
o. This current trip makes me feel revitalized	**1**	**2**	**3**	**4**	**5**	**6**	**7**
p. I am doing something meaningful in this trip	**1**	**2**	**3**	**4**	**5**	**6**	**7**
q. I am doing something important in this trip	**1**	**2**	**3**	**4**	**5**	**6**	**7**
r. I am learning something about myself	**1**	**2**	**3**	**4**	**5**	**6**	**7**
s. I am visiting places where I really wanted to go	**1**	**2**	**3**	**4**	**5**	**6**	**7**
t. I am enjoying activities which I really wanted to do	**1**	**2**	**3**	**4**	**5**	**6**	**7**
u. I am interested in the main activities of this trip experience	**1**	**2**	**3**	**4**	**5**	**6**	**7**
v. I am exploring new things in this trip	**1**	**2**	**3**	**4**	**5**	**6**	**7**
w. I am gaining knowledge from this trip	**1**	**2**	**3**	**4**	**5**	**6**	**7**
x. I am experiencing new cultures in this trip	**1**	**2**	**3**	**4**	**5**	**6**	**7**

5. Take a moment to think about this event/festival. Think about the various images and experiences you encounter or see during the event/festival (e.g. event site, event pamphlet and other promotion materials, staff's T-shirt, banner, and billboard screen). Circle the item that best indicates the extent to which you agree or disagree with the following statement. (1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)

	Strongly Disagree			Neutral			Strongly Agree
a. Local products are visible at the event/festival	1	2	3	4	5	6	7
b. Local food is offered at the event/festival	1	2	3	4	5	6	7
c. Local customs/culture are part of the event/festival	1	2	3	4	5	6	7
d. Local landmarks of the region are apparent at the event/festival	1	2	3	4	5	6	7
e. Local symbols/rituals are part of the event/festival	1	2	3	4	5	6	7
f. Local celebrities/icons are visible during the event/festival	1	2	3	4	5	6	7
g. The event/festival is held at a local attraction/setting	1	2	3	4	5	6	7
h. Local attributes/characteristics are visible during the event/festival	1	2	3	4	5	6	7

6. For each description listed below, circle the number to the right that best describes your satisfaction about this event. (1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)

	Strongly Disagree			Neutral			Strongly Agree
a. Overall, I am pleased with this event/festival	1	2	3	4	5	6	7
b. Overall, I am happy with this event/festival	1	2	3	4	5	6	7
c. Overall, this event/festival is favorable	1	2	3	4	5	6	7
d. Overall, I am satisfied with this event/festival	1	2	3	4	5	6	7

7. For each description listed below, circle the number to the right that best describes your behavior intention about this event. *(1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)*.

	Strongly Disagree			Neutral			Strongly Agree
a. I will keep attending this event/festival.	1	2	3	4	5	6	7
b. I will prioritize this event/festival over other events when deciding whether to attend.	1	2	3	4	5	6	7
c. I will recommend this event/festival to my friends, relatives and neighbors.	1	2	3	4	5	6	7
d. I will spread positive word of mouth about this event/festival.	1	2	3	4	5	6	7

PART 3: DESTINATION IMAGE ENHANCEMENT

1. Since attending this event/festival has your overall destination image of Columbia, SC and region changed?

Much Worse			No Change			Much Better
1	2	3	4	5	6	7

2. Do you think your experience at the event/festival changes your impression of Columbia, SC, and surrounding region? Circle the item that best indicates the extent to which you agree or disagree with the following statement. (*1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)*

	Strongly Disagree			Neutral			Strongly Agree
a. The destination has become more exciting	1	2	3	4	5	6	7
b. The destination has become more relaxing	1	2	3	4	5	6	7
c. The destination has become more friendly	1	2	3	4	5	6	7
d. The destination has become more diverse	1	2	3	4	5	6	7
e. The destination has become more arousing	1	2	3	4	5	6	7
f. The destination has become more attractive	1	2	3	4	5	6	7
g. The destination has become more pleasant	1	2	3	4	5	6	7

3. Think about this event/festival and Columbia SC and surrounding region. Please circle the number that best indicates the extent to which you agree or disagree with the following statement. (*1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)*.

	Strongly Disagree			Neutral			Strongly Agree
a. The image of the event/festival and image of Columbia, SC surrounding region are similar	1	2	3	4	5	6	7
b. The image of the event/festival and image of Columbia, SC and surrounding region are consistent	1	2	3	4	5	6	7
c. The image of the event/festival and image of Columbia, SC and surrounding region are fit.	1	2	3	4	5	6	7

4. Please circle the number that best indicates the extent to which you agree or disagree with the following statement. *(1=Strongly Disagree, 4=Neutral, 7=Strongly Agree)*

	Strongly Disagree			Neutral			Strongly Agree
a. I would recommend Columbia, SC and the surrounding region to others	1	2	3	4	5	6	7
b. I plan to return to the region	1	2	3	4	5	6	7
c. I will encourage friends and family to visit Columbia SC, and the surrounding region for a vacation.	1	2	3	4	5	6	7

PART 4: DEMOGRAPHICS

1. **Please indicate your current residency zip code: ____________**

2. **What is your gender?** 1) Male 2) Female

3. **What year were you born? _______________**

4. **What is your marital Status?**

   1) Single (never married) 2) Married 3) Widowed/Divorced/Separated

5. **What is your ethnic group?**

   1) Caucasian 2) African-American 3) Hispanic 4) Asian
   5) Native American 6) Multi-racial 7) Other *(please specify)*:___________

6. **What is the highest level of education you have completed? Please mark only one.**

   1) High school degree or lower 2) Some college or Associate degree

   3) Bachelor's degree 4) Master/Doctorate degree

7. **Total 2014 annual household income:**

   1) Less than $20,000 2) $20,000-$40,000 3) $40,001-$60,000

   4) $60,001-80,000 5) $80,001-$100,000 6) $100,001-$150,000

   7) $150,001 - $200,000 8) $200,001 - $300,000 9) $300,001 or above

8. **What is your current employment status?**
   1) Employed full-time
   2) Employed part-time
   3) Homemaker/housewife
   4) Temporarily unemployed/looking for work
   5) Retired
   6) Student
   7) Other (Please specify)____________________

7. **Do you have any other views about the event? Please feel free to write about them.**

____
____
____
____

THANK YOU FOR COMPLETING THE SURVEY!

APPENDIX 2: DESCRIPTIVE ANALYSIS OF KEY VARIABLES FOR 2013 DATA SUPPLIED BY H-TAX RECIPIENTS

Appendix 2.1: Descriptive analysis on mean of variables with time:

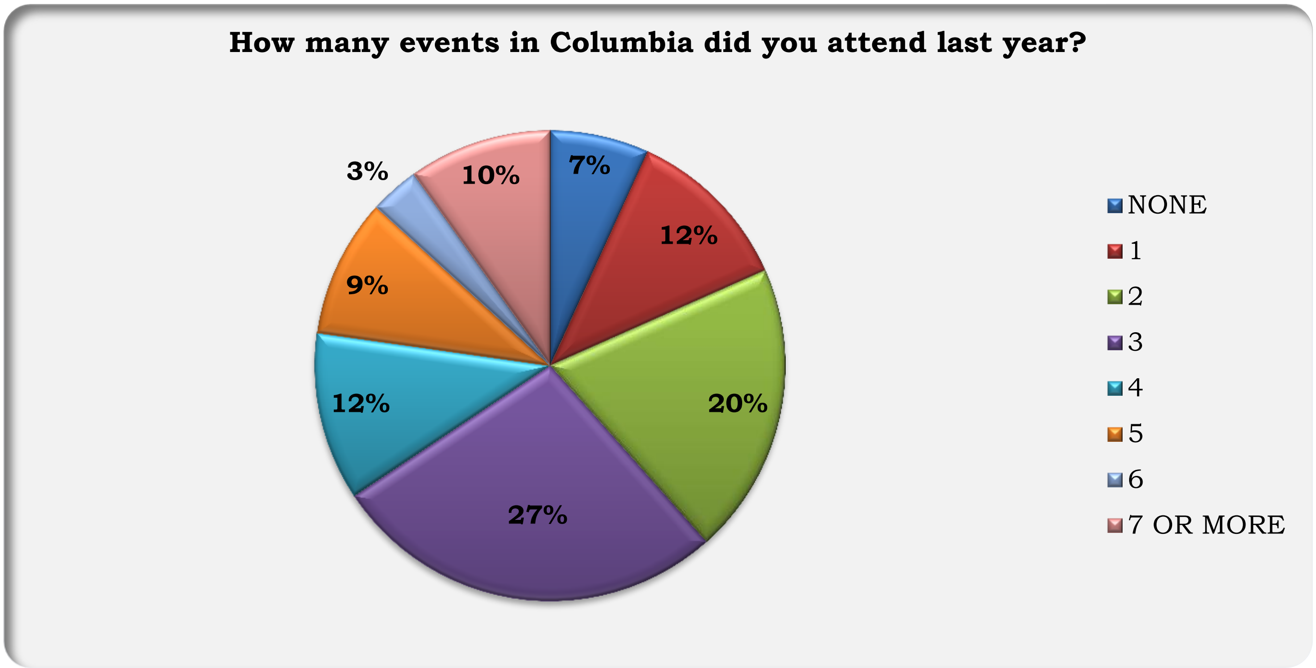
Mean	2004 2005	2005 2006	2006 2007	2007 2008	2008 2009	2009 2010	2010 2011	2011 2012
Total city dollars received	$82,680	$106,716	$93,812	$84,978	$110,899	$93,877	$84,364	$68,408
% of event budget	32%	31%	34%	34%	33%	35%	32%	35%
% of org. budget	23%	19%	22%	21%	28%	27%	24%	24%
Other funding	$373,968	$375,566	$405,669	$326,805	$360,208	$329,510	$293,520	$267,449
Other revenue	$403,045	$399,410	$440,499	$404,569	$355,915	$274,307	$382,211	$627,170
Total attendance	51,792	51,782	49,411	44,664	38,670	32,148	41,431	56,041
% of visitors	48%	52%	51%	50%	52%	55%	54%	54%

Appendix 2.2: Descriptive analysis on standard deviation of variables with time:

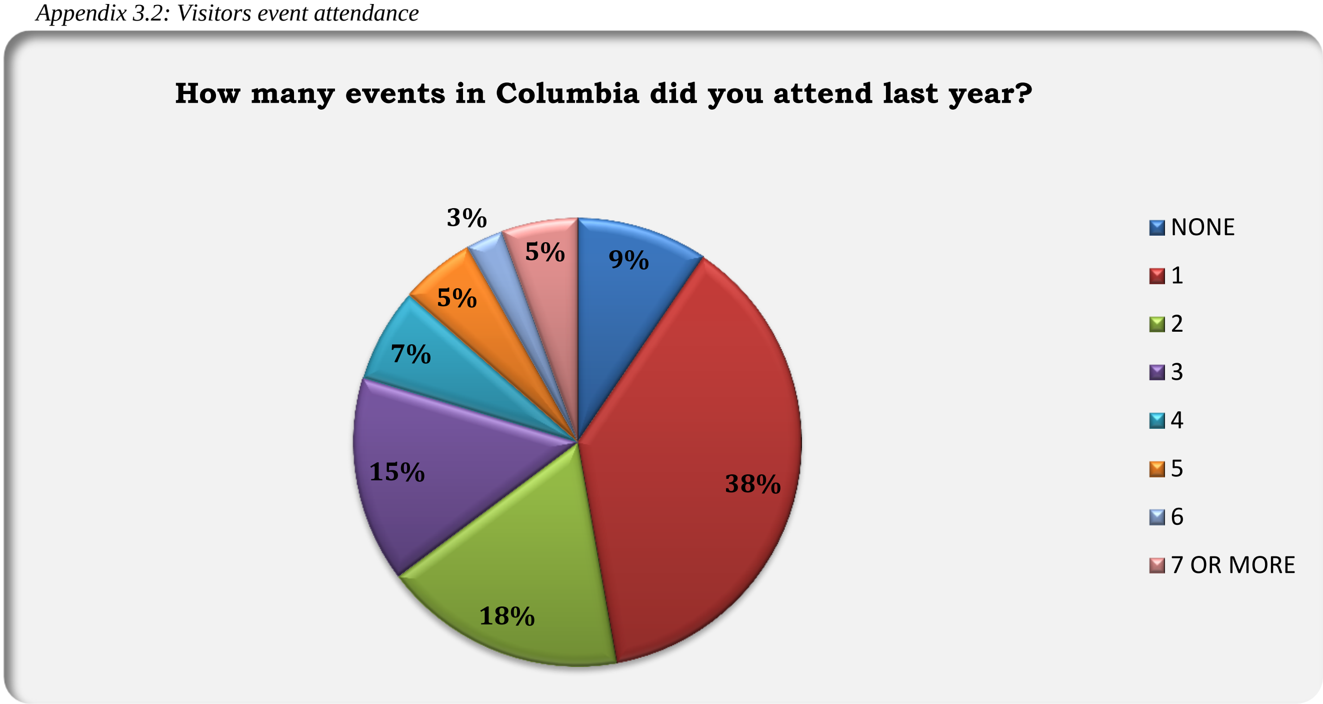
Standard Deviation	2004 2005	2005 2006	2006 2007	2007 2008	2008 2009	2009 2010	2010 2011	2011 2012
Total city dollars	$1,379,623	$156,109	$144,626	$149,422	$154,354	$145,034	$138,645	$126,449
% of event budget	24%	21%	21%	22%	28%	22%	23%	24%
% of orgs. budget	26%	19%	19%	21%	27%	24%	23%	22%
Other funding	$626,882	$730,800	$799,215	$737,429	$731,815	$725,876	$699,187	$689,208
Other revenue	$549,375	$651,693	$732,399	$686,027	$659,968	$607,268	$1,007,309	$1,827,186
Total attendance	82,427	80,724	78,613	77,810	74,196	67,163	95,629	165,256
% of visitors	25	24	26	28	26	25	22	23

APPENDIX 3: EVENT ATTENDANCE:

Appendix 3.1: Resident event attendance history



Appendix 3.2: Visitors event attendance



APPENDIX 4: RESULTS OF THE RESIDENT AND VISITOR SURVEY DATA COLLECTION

Appendix 4.1: Resident reasons for attending event

Residents top reasons for attending		**Residents lowest rated reasons for attending**	
Have Fun	181	My family likes to go there	41
Relaxing Entertainment	159	Other	29
Support Local Event	157	They charge reasonable prices	25

Appendix 4.2: Resident's perception of the level of quality of event

Residents' highest rated perceptions of quality		**Residents' lowest rated perceptions of quality**	
The event is fun	6.31	The restrooms were well maintained	5.67
The event location is appropriate for its purpose	6.20	Price of the event products are reasonable	5.64
The event was well organized	6.15	The parking facility is convenient	5.51

Appendix 4.3: Visitors reasons for attending this event

Visitors top reasons for attending		**Visitors lowest rated reasons for attending**	
Have Fun	70.1	Cultural improvement	18.2
Relaxing entertainment	61	My family like to go there	18.2
Meeting People Friendly atmosphere	48.6 48.6	Other	18.2

Appendix 4.4: Visitor's perceptions of the quality of the Event

Visitors top rated perceptions of the quality of the event		**Visitors lowest rated perceptions of the quality of the event**	
Event is fun	5.95	The signage enhanced my understanding of the information and directions	5.57
The event area is clean	5.94	The parking facility is convenient	5.53
The event is well organized The event location is appropriate	5.87 5.87	The products (souvenirs, food) offered at event varied	5.37

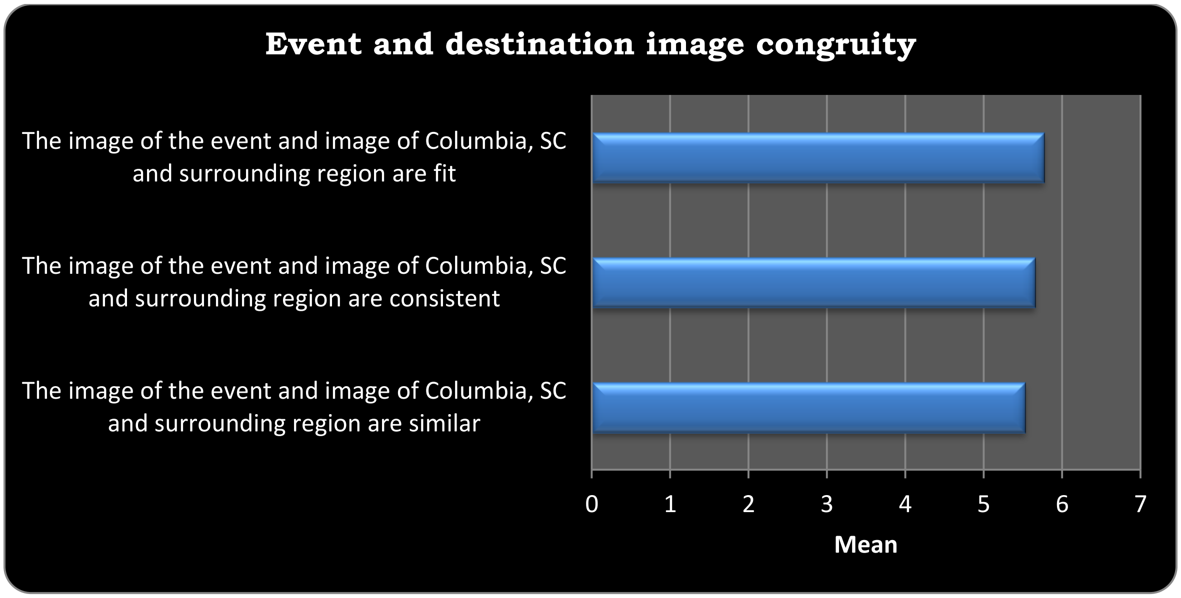
Appendix 4.5: Perception of event image reported by visitors

Highest rated images of event reported by visitors		**Lowest rated images of event as reported by visitors**	
Pleasant	6.14	Attractive	5.92
Friendly	6.07	Diverse	5.79
Relaxing	6.0	Arousing	5.65

Appendix 4.6: Visitors impression of what made the event memorable

Highest rated impressions from visitors that made the event memorable		**Lowest rated impressions from visitors that made the event memorable**	
The local people are friendly	6.09	I am experiencing something new	5.09
I am interested in the main activities of this trip experience	6.07	My current trip experience is different from previous experiences	5.05
My current trip experience to Columbia, SC is exciting	5.97	My current trip to Columbia, SC is a once-in-a-lifetime experience	4.56

Appendix 4.7: Event and Destination image congruity



APPENDIX 5: DEMOGRAPHICS

Appendix 5.1 Resident participant's demographics

	Frequency:	Percent:
Gender:		
Male	95	32.30%
Female	199	67.70%
Total	294	100.00%
Age:		
Less than 20	7	2.60%
21~40	130	47.40%
41~60	90	32.80%
61 or above	47	17.20%
Total	274	100.00%
2014 annual household income:		
Less than $20,000	45	16.50%
$20,000-$40,000	59	21.60%
$40,001-$60,000	36	13.20%
$60,001-80,000	35	12.80%
$80,001-$100,000	38	13.90%
$100,001-$150,000	29	10.60%
$150,001 - $200,000	9	3.30%
$200,001 - $ 300,000	15	5.50%
$300,001 or above	7	2.60%
Total	273	100.00%
Ethnicity:		
Caucasian	184	62.80%
African-American	74	25.30%
Hispanic	8	2.70%
Asian	12	4.10%
Native American	1	0.30%
Multi-racial	7	2.40%
Other	7	2.40%
Total	293	100.00%
Education:		
At least a High School degree	24	8.20%
Some college or Associate Degree	77	26.40%
Bachelor's degree	98	33.60%
Master's/Doctorate	93	31.80%
Total	292	100.00%
Marital Status:		
Single (never married)	114	38.80%
Married	125	42.50%
Widowed/Divorced/Separated	55	18.70%
Total:	294	100.00%

Occupation:		
Employed full-time	190	64.40%
Employed part-time	27	9.20%
Homemaker/housewife	9	3.10%
Temporarily unemployed/looking for work	6	2.00%
Retired	33	11.20%
Student	23	7.80%
Other	7	2.40%
Total	295	100.00%

Appendix 5.2: Visitor Participants' demographics

	Frequency:	**Percent:**
Gender:		
Male	25	32.9%
Female	51	67.1%
Total	76	100.0%
Age:		
18-37	12	17.4%
38-49	12	17.4%
50-68	36	52.2%
Over 68	9	13.0%
Total	69	100.0%
2014 annual household income		
Less than $20,000	10	15.4%
$20,000-$40,000	12	18.5%
$40,001-$60,000	10	15.4%
$60,001-80,000	10	15.4%
$80,001-$100,000	12	18.5%
$100,001-$150,000	8	12.3%
$150,001 - $200,000	1	1.5%
$300,001 or above	2	3.1%
Total	65	100.0%
Ethnicity:		
Caucasian	51	68.9%
African-American	18	24.3%
Hispanic	2	2.7%
Asian	1	1.4%
Multi-racial	2	2.7%
Total	74	100.0%
Education:		
At least a High School degree	6	8.1%
Some college or Associate Degree	23	31.1%
Bachelor's degree	15	20.3%
Master's/Doctorate	30	40.5%
Total	74	100.0%

Marital Status:		
Single (never married)	18	23.7%
Married	41	53.9%
Widowed/Divorced/Separated	17	22.4%
Total:	76	100.0%
Occupation		
Employed full-time	34	45.3%
Employed part-time	11	14.7%
Temporarily unemployed/looking for work	1	1.3%
Retired	21	28.0%
Student	3	4.0%
Other (Please specify)	5	6.7%
Total	75	100.0%

APPENDIX 6: H-TAX RUBRIC

City of Columbia H-Tax Rubric - Applicant Number: 001

Standards	3- Exemplary	2 - Fair	1 - Poor	Score	Weight	Total
Application and Training	Application and all required documents submitted by the deadline Organization attended training sessions. Record of training attendance has been confirmed	Applicant submitted a partial application and with most of the required documents by the deadline Applicant did not attend training.	Applicant submitted partial application with most of the required documents Applicant did not submit application by deadline Applicant did not attend training		X10	20
Org. Qualities and Feasibility of Event Plan	Organization demonstrates a high level of competence and ability to host the event Organization has a strong fiscal management plan (i.e. managed its previous funding with a high degree of efficiency) The event is well planned The event/ organization demonstrates collaboration with or plans to	The organization demonstrates an adequate level of competence and ability to host the event The organization has an adequate fiscal management plan The event plan is suitable with some minor concerns about the coordination of the event. Organization has limited plans to	The organization does not demonstrate an adequate level of competence and ability to host the event Organization has a poor fiscal management plan or no fiscal management plan The event plan is weak and there are serious concerns about the coordination of the event No partnerships or collaborations are		X10	20

	collaborate with other organization /events in the community.	collaborate with others in the community.	planned within the community.			
Economic Impact) ***(Compared to events of similar size)***	The proposed event is projected to have a significant economic impact on the community The proposed event has the ability to attract a significant number of tourists Event is projected to attract an increase in the number of attendees compared to previous years (if applicable) Economic and attendance figures provided are considered reliable and well justified.	The proposed event will have a minimal economic impact on the community The proposed event has the ability to attract a limited number of tourists The proposed event is projected to have consistent attendance numbers as in previous years. (if applicable) Economic and attendance figures provided are justified.	The proposed event will have a net-neutral economic impact on the community It is unlikely that the event will attract tourists Economic and attendance projections are unavailable and/or unreliable.		X10	20
Community Enrichment	The proposed event has the potential to substantially	The proposed event has the potential to increase the community's	As written, there is little evidence that the proposed event will increase the		X10	20

	increase the community's quality of life. The event provides the community with a unique and diverse experience that enhances and enriches the community's well-being.	quality of life. The event will potentially provide the community with a unique experience.	community's quality of life or enrich the community's well-being.			
Budget/ Use of Funds	The budget for the proposed event is consistent with the goals/purpose of the H-Tax funds The budget is well developed and appropriate for the proposed event Applicant has provided reasonable and justifiable budget projections The organization has a well-developed plan for becoming financially sustainable in the near future.	The budget for the proposed event is consistent with the goals/purpose of the H-Tax funds The budget is adequate for the proposed event Applicant has not provided a detailed and accurate justification for budget projections The organization has an adequate plan for becoming financially sustainable in the near future	The proposed event is not consistent with the goals/purpose of the H-Tax funds The budget projections are not consistent with the event planned Applicant has not provided adequate justification consistent with the budget projections. The organization does not have a feasible plan for become financially sustainable in the near future.		X10	20

Grand Total: ________

Reviewer's Notes:

Getting Started With Program Evaluation

A Guide for Arts Organizations

CONTENTS

Untitled, Tom Graffagnino
Georgia State Art Collection

This guide is a joint production of the Georgia Council for the Arts and the National Assembly of State Arts Agencies.

Georgia Council for the Arts
Office of the Governor

States Art
National Assembly of State Arts Agencies

Zebra Beach IV, Patrick McCay
Georgia State Art Collection

WHY EVALUATE?

What methods will you use to evaluate this program?

How will you monitor the effects of your program on participants?

What indicators will you use to measure your progress in attaining your goals?

Phrases like these will be familiar to many arts organizations, especially those that seek funding from public agencies or foundations. If your organization has not yet encountered an evaluation requirement of some kind, get ready! Evaluation has become a fact of life for nonprofit organizations in the 21st century. Like all other charitable groups, arts and cultural organizations are increasingly required to document what they accomplish and assess the impact of their programs.

When combined with good planning practices, however, evaluation is not just a reporting requirement imposed upon arts organizations by funders. It is also a tool for organizational learning—a tool that can help manage your programs, spend your funds wisely and help your constituents and potential investors understand your work.

This guide is designed to help arts organizations reap these evaluation benefits. Its intent is to provide introductory information and ideas that arts organizations may supplement with their own experience, as well as with the growing body of literature about program evaluation in the arts. Most of all, this guide is designed to invite your creative thinking and to encourage you to use evaluation to tell your story in authentic and compelling ways.

- **ENHANCE THE RESULTS OF YOUR PROGRAMS, MARKETING EFFORTS OR MANAGEMENT.** Evaluation can shed light on persistent challenges and reveal keys to success. It can also help you pinpoint what strategies provide the greatest return on your time and effort.
- **HELP GRANT-MAKERS AND DONORS UNDERSTAND YOUR WORK.** Evaluation results illustrate the impact of your programs. This information helps funders describe the community benefits that stem from their sponsorship. It also can help them justify future funding. Evidence of ongoing evaluation further shows that good planning and management practices are in place in your organization, which raises confidence among all of your investors.
- **DEMONSTRATE ACCOUNTABLE USE OF TAXPAYERS' DOLLARS.** State, federal and local governments bear additional responsibilities for ensuring that public dollars are being put to good use. When you receive funding from a state arts agency, the National Endowment for the Arts or any municipal or county agency, you become a steward of that public trust, too. Evaluation helps to demonstrate that the taxpayers' dollars you receive are in good hands.
- **ENGAGE YOUR STAKEHOLDERS.** Program participants —audience members, staff, volunteers, artists and teachers—all have insight to share. Involving stakeholders in your evaluation conveys that you value their input and reinforces connections among the people taking part in your program.
- **HELP COMMUNITIES RECOGNIZE THE VALUE OF THE ARTS.** Suzanne Callahan, in Singing Our Praises: Case Studies in the Art of Evaluation writes that research, "builds trust, understanding and visibility for the arts field, convincing those in the outside world of the value of what we do." (Callahan, p. 15) By evaluating their programs, conducting research and sharing knowledge with others, arts organizations deepen public appreciation for the role that the arts play in society.
- **MAKE THE CASE FOR MORE RESOURCES.** Evidence of what you are currently accomplishing—and what you could accomplish with additional resources—strengthens your requests for financial, human and material assistance. This is particularly important in the public sector, where funding is scarce and the arts must compete with a host of other pressing needs. Your evaluation efforts can help you and others advocate for the arts and prove that supporting culture is in the best interests of your state's citizens, children, families, businesses and communities.

WHAT IS "DATA" AND WHERE DO I GET IT?

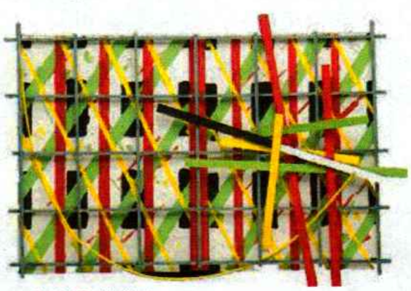
If you can observe it, it is data.

Data is factual information, especially information that is systematically organized and used to help someone make a decision. Most people associate the word "data" with numbers: dollars, demographics, percents or averages. Statistical or standardized information, usually called *quantitative* data, is part of most evaluations, but is by no means the only kind of information that is useful to arts organizations. While quantitative data can identify important trends or patterns, *qualitative* data is often needed to reveal the deeper meaning behind the numbers.

For instance, an audience survey can quantify the percent of people who might attend another performance at your venue. Until you probe for additional qualitative information, however, little about that data is actionable for you as an arts manager. Asking "Why or why not?" to elicit qualitative responses may reveal important insight, such as:

- The parking is terrible,
- I could not hear the dialogue,
- I only go to events when I can get a babysitter,
- I received this ticket as a gift and cannot afford to buy another, or
- I faithfully attend every choral event in our town.

Armed with such information, you can now decide which conditions you wish to address in the future. This is why a good evaluation typically blends different kinds of information: quantitative information to identify major trends, and qualitative information to provide depth of understanding.



Untitled, Patricia Hetzler
Georgia State Art Collection

ARTS DATA: A SAMPLER OF IDEAS

Participation data describes your audience and their experiences.

Number of individuals participating
Participant demographics
Home zip code or address
Motivation for attending
Opinions about the event or exhibit
Personal arts interests and preferences
Participant ratings of your customer service
Perceived barriers to participation
Etc...

Marketing data helps you attain your audience development goals and understand the effectiveness of your outreach.

Where did participants hear about this event?
Were tickets purchased via mail, on-line or in person?
What types of tickets were purchased?
Were outreach strategies to target markets successful?
Etc...

Financial data can help you calculate management efficiency and return on investment.

Admissions income
Memberships
Grants and contributions
Number of donors
Number of donors increasing their contributions
Project costs
Savings achieved
Etc...

Impact data helps you understand the effects of your program on participants and your surrounding community.

Perceived benefits to participation
Changes in behaviors or attitudes
Learning outcomes
School climate
Achievement, attendance or discipline of students
Audience spending on parking, meals or housing
Quality of life
Etc...

OUTCOMES
Measurable changes in a person or group's status, skills, attitudes, knowledge or circumstances.

OUTCOME GOALS
The changes you hope to achieve in your organization, in your community or among your program's participants. Outcome goals can be short-term or long-term. It is helpful to articulate them in your project plan or your organization's strategic plan.

INDICATORS
Selected data—quantitative or qualitative—that can be gathered to measure progress toward your outcome goals. You can choose any indicators, but make sure that they are both *relevant* to the outcome and *feasible* for you to collect.

Many different sources of data are available to arts organizations. A few examples include:

- **Admissions/enrollment records:** Many arts organizations track ticket sales or class enrollments through a database or spreadsheet program. Consider how you might mine this data in order to measure the extent of participation in your events. Are numbers increasing over time, holding steady or declining? Why? Do you systematically collect and record all the information that you and your funders need? Assess whether you should secure additional information to tell you more about your audience and assist you with marketing your programs.
- **Financial records:** Try to tally all financial transactions (including salaries) connected to your project. How do your expenses compare with your revenue? What areas are most expensive, but worth every penny? In what areas might cost-savings be achieved? Do you have specific financial goals for your organization or program? How close are you to achieving those goals? When developing your budgets at the beginning of your fiscal year, be sure they contain enough detail for you to realistically reflect on these questions and make sound financial management decisions.
- **Surveys:** Surveys, especially audience surveys, are common evaluation and marketing tools in the arts field. Often they are used to understand the composition of an organization's audience, but they also can be adopted to gather information on opinions, motivations, preferences, perceived barriers or other issues. The success of surveys usually hinges on two factors: the quality of the questions (crafting questions that are clearly understood and can be accurately answered) and the respondent pool (securing a response that is sufficiently large and diverse to be truly representative of your population).


Untitled, Maurice Blaine Caldwell
Georgia State Art Collection

- **Interviews:** Interviews may be conducted in person or on the telephone and are a good choice when the information you need is sensitive or confidential in nature, or when the respondent will appreciate personal attention. Interviews also offer you the flexibility to adapt the inquiry to individuals by omitting irrelevant questions or taking more time to probe key issues. To encourage candid responses, choose an interviewer who will be perceived as trustworthy by the interviewees.
- **Focus groups:** Focus groups are designed to elicit qualitative information from a small number of people through dialogue and group interaction. Five to ten individuals typically participate in a focus group, which are often used to probe the "why's and wherefores" of participants' behaviors or opinions. Focus groups are best led by a trained moderator— an impartial individual who is

knowledgeable about the subject and skilled in group facilitation techniques. If you want to conduct a focus group, you will need to develop a protocol in advance, to ensure that the conversations address the questions that matter most to you. Arrange for a transcript of the proceedings to enable analysis of the information.

- **Pre- and post-tests:** When designed around specific learning objectives, tests can measure the "before and after" skills, knowledge or perceptions of students in workshops, classes or other educational programs. A comparison of these two scores is one way of measuring the learning and skill outcomes of arts instruction.
- **Journals or portfolios:** Journals or portfolios provide a written or visual record of learners' experiences and achievements. Artists and arts teachers often cite the dual value of these assessment techniques. They not only help instructors measure skill development, but also are tools that encourage students to self-reflect on their own work.
- **Direct observations:** Observation is a useful way to gather real-time behavioral information using artists, teachers, staff or volunteers. Observers can be trained to look for specific actions, activities or behaviors during a class, performance or other event. Consistency is the key to observation success. Be sure that all observers are well-practiced and attentive. Provide a uniform checklist or log that helps them record what they see.

CAN WHAT WE DO IN THE ARTS REALLY BE MEASURED?

"Can we measure joy? Yes we can. And by knowing where and how to look for it, how to document what we see and hear, and how to communicate that, we can create opportunities for more joy more often."

These are the words of Deborah Bedwell, director of Baltimore Clayworks, a nonprofit ceramic arts center housed in Baltimore, Maryland. Challenged by funders to evaluate the impact of their community arts program, the Clayworks staff decided to investigate not only the delivery of their services but also the effects of hands-on clay classes on local youth. To do this, Clayworks staff developed a list of indicators teachers would be able to observe and record among students when an authentic, engaging experience was taking place. A few of those items included:

- Shows work to peers
- Concentrates on techniques
- Holds work close to body
- Uses clay vocabulary

Basket, Kathy Gottlieb
Georgia State Art Collection

Clayworks also tracked students' enrollment, their completion of ceramic works, their completion of journals and whether they recruited friends and family members to participate in subsequent events and classes. Combined, this information painted a powerful portrait of the program's success. Using a logic model for their program also helped Clayworks clearly articulate their intended outcomes and focus their evaluation efforts where they would provide the most useful feedback for planning and further program improvement.

Similar stories can be shared by many arts organizations who have found creative ways to assess the arts participation experience of their constituents. None of these organizations is seeking to quantify the transcendent nature of the artistic experience. However, an evaluation that focuses exclusively on the mechanics of an arts program may leave a significant gap in our understanding of its full value and impact.

One useful way to add an artistic dimension to an evaluation is to brainstorm what might be *observable* about a participant's experience. For instance:

> An evaluation that focuses exclusively on the mechanics of an arts program may leave a significant gap in our understanding of its full value and impact.

- **How did individuals participate in your event?** Did they stay for the entire event? Did they attend multiple times? Did they watch attentively? Did they become physically involved? Did they take advantage of all participation opportunities, such as interactive exhibits, audio tours or artist discussions?
- **What reactions did your work evoke among participants?** What did they like the best? Like the least? What feelings, ideas or questions did their experience evoke?
- **What do you hope participants will learn about the art form or the artistic process, and how could that be measured?** Can students use the required tools, materials or instruments? Do they demonstrate mastery of certain exercises or techniques? Can they express key concepts? Do students exhibit creativity by engaging in experimentation or pursuit of their own original ideas?
- **What else might participants learn—about themselves, their fellow participants or the larger community—through your program?** Inviting personal reflections from participants can be a rich source of qualitative information.
- **What did the artists, performers, instructors or other project staff experience?** What did they learn, themselves? What reactions did they observe in others?

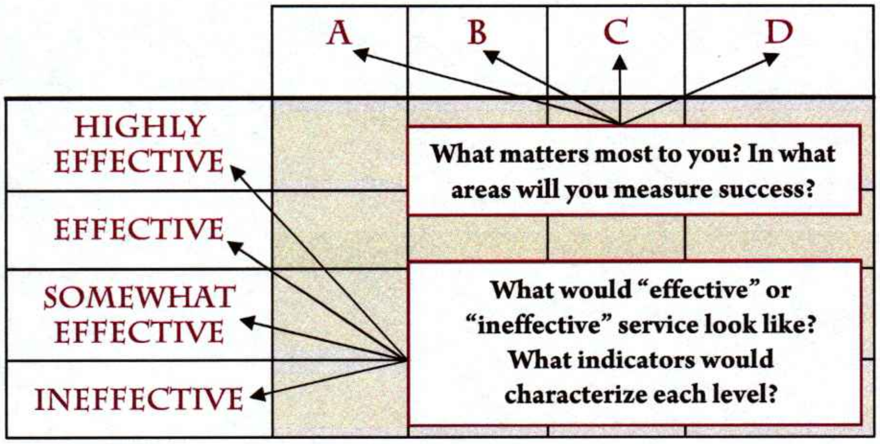
Remember that the most meaningful measures will be those that are authentic to your unique goals, constituency and art form. There are no "right" or "wrong" indicators to monitor. Measure what is relevant to you and aligns best with your program's goals and objectives.

EVALUATION FRAMEWORKS

Rubrics and logic models are two planning tools that can provide helpful structure for the evaluation of any arts program.

Widely used in the education sector as a tool for measuring student success in classroom settings, **rubrics** are a tool that many arts organizations have adapted to their unique arts programming and management environments. Simply defined, a rubric is a grid that articulates what project success and failure look like in concrete terms. Rubrics force an organization to focus on what is most worth measuring, rather than what is easiest to count.

RUBRIC FRAMEWORK



SAMPLE RUBRIC

(ACTIVITY: TEN-WEEK EXHIBIT)

	QUALITY OF EXHIBIT	ACTIVE VISITOR PARTICIPATION	ATTENDANCE
HIGHLY EFFECTIVE	▪ Memorable or evocative to visitors (75% or more of visitors can identify a "favorite" or "most interesting" work during exit interviews) ▪ Receives consistently high critical acclaim	▪ 80% or more of visitors used one or more interpretive tools (e.g., the audio guide, the children's treasure hunt, interactive exhibit features, or the exhibit catalog)	▪ Weekly admissions reached target numbers in all 10 weeks of the exhibit
EFFECTIVE	▪ 60% of visitors identify a "favorite" or "most interesting" work ▪ Most critical reviews favorable	▪ 70% of visitors used tools	▪ Weekly admissions reached target numbers in 8-9 weeks
SOMEWHAT EFFECTIVE	▪ 50% of visitors identify a "favorite" or "most interesting" work ▪ Mixed critical reviews	▪ 60% of visitors used tools	▪ Weekly admissions reached target numbers in 6-7 weeks
INEFFECTIVE	▪ 40% or fewer visitors identify a "favorite" or "most interesting" work ▪ Critical reviews consistently negative	▪ 50% or fewer of visitors used tools	▪ Weekly admissions reached target numbers in fewer than 6 weeks

Numerous cultural groups funded by the Geraldine R. Dodge Foundation in New Jersey have developed rubrics that not only help them describe their achievements to the foundation but, more importantly, enhance their ability to visualize success and manage their work to achieve their project goals. These New Jersey arts organizations developed rubrics to evaluate all dimensions of their work: student learning, a performance or exhibition, marketing practices, communications, board and community engagement… even office cleanliness!

How many columns or rows your rubric contains is not terribly important. What does matter, however, is choosing factors that are meaningful to your work and mission. Be as specific as possible about what you believe constitutes excellence, and challenge yourself to define what data or indicators will be associated with each performance level.

Comedy, Tragedy, Fear, K.G. McIntosh
Georgia State Art Collection

Logic models are another powerful tool that arts organizations harness for planning and evaluation. First popularized in the nonprofit sector by the United Way in the 1990s, logic models today offer a blueprint that helps many arts organizations articulate their desired outcomes and identify the inputs, activities and outputs necessary to achieve those goals. Logic models are especially useful because they encourage "planning backwards." By first describing your outcome goals, then describing the resources and activities you will pursue to achieve those ends, logic models help to keep your work on track. This approach also helps your evaluation stay tightly tuned to your program goals. Clarity and consensus about outcome goals is vital. If your outcomes are vague or have different meanings to different people, it will be very difficult to determine what evaluation strategies and data will be productive.

LOGIC MODEL FRAMEWORK

OUTCOME GOALS: What do we hope will change (for our constituents, community or organization) as a result of our work?

INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES
What people, partners, funds, materials or space will we need to achieve our outcomes?	What events, action steps or activities will happen during our program?	What does our program produce? Attendees, materials distributed, memberships renewed, artworks created, artist fees paid, funds raised, etc.	What actually changed for our constituents, community or organization? How does that inform future goals?

What indicators or data should we monitor throughout the process?
What data collection techniques will we employ to monitor those indicators?

SAMPLE LOGIC MODEL

OUTCOME GOAL: To improve the health and well-being of residents in the Senior Living Center through dance and creative movement.

INPUTS

- Two trained teaching artists
- Creative movement plan (approved by Center physician)
- Support team of Center nursing staff
- Space (recreation room, reserved 3 times weekly for 3 months)
- Artist fees ($200 per artist per session)

ACTIVITIES

- Planning meetings with coordinating physician and staff support team
- Promotion of program to patients, families and all Center staff
- Artist-led movement sessions (45 minutes, 3 times weekly for 3 months)
- Participant interviews
- Staff medical assessments (pre- and post-program) of clients
- Staff interviews

OUTPUTS

- Number of participating clients
- Number of clients participating in 8 or more sessions
- Number of Center staff participating or observing
- Interview reports
- Staff reports
- Artist observation logs and journals

OUTCOMES

- Clients actively participate within their abilities
- Participants interact with each other, artists and staff
- Participants say they enjoy the program
- Participants exhibit positive physical effects (increased range of motion, better circulation, stimulated appetite, more restful sleep)
- Staff perceives participation to be beneficial to clients
- Artists find the experience rewarding

ADVICE FOR THE BEGINNER

- **Design your evaluation at the *start* of the project or funding cycle.** Last-minute evaluations miss abundant opportunities to learn, interact with constituents and collect useful real-time feedback throughout the course of a project. Combining evaluation with your strategic planning maximizes the benefits of both.
- **Start small.** While comprehensive evaluation or large-scale research studies are sometimes appropriate, even modest evaluation efforts can reap significant rewards. Start by evaluating one program or project.

GETTING STARTED

1. **Articulate your outcome goals.** What are you trying to learn, change or accomplish with this program?
2. **Identify indicators.** What kinds of information might reveal your progress or challenges?
3. **Inventory what you already know.** Is there useful information already in place? Does your experience suggest certain factors would be worthwhile to investigate?
4. **Get ready to secure additional information.** What surveys, interviews, tests or other activities will need to take place?
5. **Brainstorm how you will use the information.** With whom should you share what information, and why? How do those factors shape your evaluation plan?
6. **Ask for help.** What staff, volunteers or consultants will you need to assist with data collection, analysis or reporting?

- **Build a data "mosaic" that is unique to your program.** Assemble a selection of indicators that are feasible to monitor and that can provide you with insight into your work and its effects. Quantitative and qualitative information complement one another, so be certain to include some of each.
- **Do not be afraid to "do-it-yourself."** Many kinds of evaluation can be conducted by your own staff, board or volunteers. Taking a hands-on approach means that your evaluation will greatly benefit from the knowledge and experience (of your programs, your audiences and your organization) that you bring to the task.
- **However, know when to ask for help.** Professional assistance is useful when you need to employ special research methods or conduct advanced analysis. The design of questions and sampling methods used for polls and surveys often can benefit from outside expertise, as can the facilitation of focus groups or other feedback forums. When evaluating sensitive issues, using a neutral "third party" evaluation also may help you to remain objective and avoid the perception (or the reality!) of bias.
- **Do not try to guess what your funders want to know.** First, consider *your* needs. Decide what methods and metrics will enhance your own learning and program success. Then, if you are not sure what additional information your funders need, ask. Most will be looking for evidence of good planning and evaluation practices and will be highly receptive to the indicators that are authentic for you. Grant makers often need specific information on your audiences, finances and economic impact, so you may have to collect additional data to comply with these requirements. But many grantees find this data collection much less onerous once systematic evaluation and performance measurement are in place.
- **Evaluation takes time, so plan accordingly.** Reserve time on your calendar to discuss and design the evaluation, train your data collectors, gather information and analyze it.

CULTIVATING A LEARNING CULTURE

- Establish an evaluation team.
- Encourage individual and group reflection.
- Make evaluation an ongoing effort.
- Share your results.

Ongoing evaluation can empower many different dimensions of your work: program design, audience development, promotional strategies, governance and fund-raising, just to name a few. These benefits, however, rarely accrue to an organization if one person alone is involved in the evaluation.

Consider who in your organization might become part of an evaluation team. Staff members, artists and teachers involved in a project are logical stakeholders. Board members, volunteers and former program participants may also be of assistance. Engage your crew in brainstorming about the challenges and opportunities they believe your program is facing. Then discuss how additional information or insight might facilitate the program's success. An evaluation team also can assist with the collection and analysis of information.

Look for ways to encourage your whole staff and board to reflect on their work at regular intervals. Sometimes the brightest ideas and epiphanies occur not during formal evaluation projects, but during routine staff and board meetings, or during informal discussions of questions such as:

- How is this program going?
- What are we doing very well?
- What could we be doing better?
- What are our hopes and aspirations for the future of this program?
- How can we get there?

Embedding such questions into your work on an ongoing basis helps your organization learn and grow over time. It also helps to build cohesion and a unified vision for your future success.

RECOMMENDED RESOURCES

Singing Our Praises: Case Studies in the Art of Evaluation
A comprehensive how-to book for the arts. Includes case studies from cultural organizations as well as practical advice on designing an evaluation, choosing indicators, collecting information, conducting surveys and working a logic model from start to finish. Written by Suzanne Callahan and commissioned by the Association of Performing Arts Presenters with funding from The Wallace Foundation.
www.forthearts.org/publications/singing.shtml

Measuring Joy
Baltimore Clayworks' executive director tells how evaluation using logic models helped her organization to strengthen their programs, allocate resources and tell the story of their impact on young lives. Originally published in the *National Arts Stabilization Journal* in 2000, this article is excerpted by the National Endowment for the Arts in "Lessons Learned: A Planning Toolsite."
www.nea.gov/grants/apply/out/joy.html

Outcome-Based Evaluation: A Working Model for Arts Projects
This guide for arts organizations describes an outcome-based evaluation process and includes examples from opera, dance and the media arts. Published by the National Endowment for the Arts.
www.nea.gov/grants/apply/out/index-out.html

Cultural Vitality in Communities: Interpretation and Indicators
This monograph introduces a definition of community cultural vitality that encompasses opportunities for arts participation, actual participation by the public and systems of support for cultural activity. Includes suggested indicators and sources of data. Written by Maria Rosario Jackson, Florence Kabwasa-Green and Joaquin Herranz. Published by the Urban Institute.
www.urban.org/publications/311392.html

Geraldine R. Dodge Foundation Assessment Initiative
This Web resource summarizes nine principles of meaningful measurement. Several sample rubrics are provided to illustrate key evaluation concepts.
www.grdodge.org/learning/assessment/index.htm

Arts Education Project Designer's Toolbook
Describes outcome measurement frameworks for arts education. Written by Michael Sikes and published by the Idaho Commission on the Arts.
www.arts.idaho.gov/ae/tool.aspx

Program Planning and Evaluation Using Logic Models in Arts Programs for At-Risk Youth
A profile of how logic models facilitate planning, forming collaborations, artist training and evaluation of program outcomes. Written by Steve Heulett and published by Americans for the Arts.
www.americansforthearts.org/NAPD/files/9491/Using%20Logic%20Models.pdf

More than Measuring
A long-term evaluation report that includes tips for designing evaluations in ways that build the capacity of communities to design and improve arts education programs for children and youth.
www.bigthought.org/

ACKNOWLEDGEMENTS

About the Artworks
The images contained in this publication are used with permission from the Georgia State Art Collection, which includes works of sculpture, photography, printmaking, painting, ceramics, jewelry, fiber and silver produced by Georgia artists. Managed by the Georgia Council for the Arts, the collection contains more than 600 original works. The collection is cataloged on-line through a partnership with Georgia Public Broadcasting and includes biographical information for many of the artists. Also included are lesson plans (consistent with core curriculum standards) that help educators use the materials to teach classroom units in the visual arts, language arts, science and Georgia history. www.gpb.org/stateart/home.htm

About the Georgia Council for the Arts
Georgia Council for the Arts Office of the Governor

The Georgia Council for the Arts (GCA) is a state agency with the mission to encourage excellence in the arts, support the arts' many forms of expression and to ensure that the arts are available to all Georgians. The agency strives for statewide coverage in the support of arts programming through grants, which are competitive applications for funding that are adjudicated by peers. The GCA charter also encourages the agency to provide services and programming that supports the arts, artists, and the arts organizations of Georgia.
www.gaarts.org/home.asp

About the National Assembly of State Arts Agencies
States art National Assembly of State Arts Agencies

The National Assembly of State Arts Agencies (NASAA) is the membership association of the nation's 56 state and jurisdictional arts agencies. NASAA provides knowledge services, representation and leadership programs that help state arts agencies fulfill their many citizen service roles. NASAA also serves as a clearinghouse for data and research about public funding and the arts. www.nasaa-arts.org

The work of the GCA and NASAA are supported and strengthened in many ways by funding and programming partnerships with the National Endowment for the Arts, which believes that a great nation deserves great art.

APPENDIX 8: PROJECT TEAM

PROJECT TEAM:

The SmartState Center of Economic Excellence in Tourism at the University of South Carolina is uniquely positioned to conduct this critical research. The Center is part of the S. C. Centers of Economic Excellence Program, established by the General Assembly in 2002 to perform research that will improve the state's economy through job creation. As part of the University's College of Hospitality, Retail, and Sport Management, the Center has access to accomplished tourism and economic research leaders and can utilize in-house technology that supports comprehensive data collection and analysis.

Dr. Simon Hudson holds the Center's endowed chair. He is internationally known and respected as a leading expert in tourism research and development. Dr. Hudson has written seven books, over 50 journal articles, and 20 book chapters. Dr. Simon Hudson's research focuses on tourism as a driver of economic development. He has led numerous research projects that involve assessment and analysis of components of tourism sectors in locations through the country, including two recent projects that analyzed tourism resources, opportunities and constraints in the South Carolina's Pee Dee region and in Aiken, S. C.

Dr. Fang Meng is an Assistant Professors attached to the Center. Her research mainly focuses on tourism destination marketing, branding, tourist behavior / experience, and international tourism. She has conducted extensive funded research projects at both regional and international levels, including South Carolina, Virginia, Ohio, and China. As a researcher and educator, Dr. Meng has strong methodological and statistical analysis skills.

Dr. David Cárdenas is an Assistant Professor at The Center. He has worked on numerous tourism development projects in South Carolina, Virginia, North Carolina, and internationally. His research interests include sustainable tourism development, community development, and consumer behavior. He has worked on numerous funded projects which have addressed a variety of critical issues such as sustainability analysis, market assessment, gender equity, economic viability, stakeholder involvement, and small business development.

Dr. Kevin So is an Assistant Professor at The Center. He has worked on multiple research projects on marketing topics such as service brand management, service experience, customer engagement, brand loyalty, internal branding, and word of mouth communications. He has extensive knowledge in advanced quantitative analysis.

PhD students: Hengyun Li, Rui Qi, Pei Zhang, Jeffery Kreeger and Yuan Wang.

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Council Office**

FROM: ***Elizabeth Gober,***

SUBJECT: **Yellow Shirts Program**

FINANCIAL IMPACT:

Funding for the Yellow Shirt Program has been provided through our Hospitality Tax.

The City Center Partnership has been funded $300,000 for the past two years for their Yellow Shirt program.

The Congaree Vista Guild was funded $150,000 in 14/15 specifically for yellow shirts. In 15/16, there was no allocation for this program so the Guild carried forward dollars to sustain the program until dollars could be identified. The most recent ask was for $225,000 less the carried forward dollars to complete the 15/16 year.

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Clerk**

FROM: ***Erika Moore, City Clerk***

SUBJECT: **Devine Street Association**

FINANCIAL IMPACT:

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Clerk**

FROM: ***Erika Moore, City Clerk***

SUBJECT: **Columbia Classical Ballet**

FINANCIAL IMPACT:

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Clerk**

FROM: ***Erika Moore, City Clerk***

SUBJECT: **Columbia Open Studios 2016**

FINANCIAL IMPACT:

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Clerk**

FROM: ***Erika Moore, City Clerk***

SUBJECT: **Discussion of Employment of an Employee**

FINANCIAL IMPACT:

Legal Department

CITY OF COLUMBIA

AGENDA MEMORANDUM

MEETING DATE: **January 19, 2016**

DEPARTMENT: **City Clerk**

FROM: ***Erika Moore, City Clerk***

SUBJECT: **Receipt of Legal Advice on Matters Covered by Attorney-Client Privilege**

FINANCIAL IMPACT:

1) *SS7231-12 Sanitary Sewer Easement Mechanical Clearing Project*

2) *Taboo*