

SOUTH CAROLINA ECONOMIC POLICY CENTER

Short-Term Rental Ordinance Study

Proposal in Response to City of Folly Beach RFP 03-26

Submitted to	City of Folly Beach
Prepared by	South Carolina Economic Policy Center (EPiC), in collaboration with The Citadel Poll
Proposed team	Kara Jones Sarah Carroll Orgul Ozturk Mark Owens Branwell DuBose Kapeluck
Proposal deadline	September 28, 2026, 2:00 p.m.
Project completion	Final Council presentation by February 29, 2027



September 28, 2026

Aaron Pope
City of Folly Beach
21 Center Street, 2nd Floor
Folly Beach, SC 29439
Re: RFP 03-26 - Short-Term Rental Ordinance Study

Dear Mr. Pope and Members of City Council:

The South Carolina Economic Policy Center (EPiC), in collaboration with The Citadel Poll, respectfully submits this proposal to the City of Folly Beach. In this proposal, we describe the tasks we will complete to provide an evidence-based decision framework to evaluate how any future Short-Term Rental Cap Ordinance fits within the concerns of the City, residents, businesses, and other municipalities.

Our team combines our skills in economic-impact analysis and experience collecting public opinion through multiple interview modes to:

- Conduct economic impact analyses of the impact of the current cap, along with a current housing market analysis for Folly Beach.
- Mail and text invitations to a public survey of residents to offer generalizable evidence.
- Host two listening sessions with residences and businesses to get qualitative responses.
- Present a final public presentation of this effort and project the impact of possible amendments. This will also culminate in a peer reviewed decision-making matrix, review of regulations, and extensive policy evaluations.

We will do all of this to align with the interests of the City Council and staff and to weave in our local knowledge from a professor that has lived near Folly Beach for over 24 years.

We set forth a clear timeline and numerous phases to structure this project. We also commit to report on our progress every two weeks. Our team of scholars look forward to meeting with the Council and hosting listening sessions with various stakeholders to ensure the Council receives a robust set of useful tools to make informed decisions well beyond the final presentation in February.

Thank you for your consideration. We welcome the opportunity to partner with Folly Beach on this consequential study.

Sincerely,

Orgül Demet Öztürk, PhD

James A. Morris Professor of Economics
Director, South Carolina Economic Policy Center
Darla Moore School of Business, University of South Carolina

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1. Firm Description and Qualifications

EPiC is the South Carolina Economic Policy Center, a research-to-policy initiative within the Department of Economics at the Darla Moore School of Business. Its mission is to connect decision-makers in and beyond South Carolina with applied economic research. The EPiC team brings joint experience collaborating with local and statewide agencies and businesses, translating rigorous analysis into practical decisions. For this engagement, EPiC will collaborate with The Citadel Poll to integrate quantitative policy analysis with locally grounded public-opinion research.

Legal offeror	University of South Carolina, Department of Economics
Responsible office	Professor Orgul Oztuk Darla Moore School of Business, Room 452I
Primary researcher	EPiC will lead the research design, economic analysis, scenario modeling, and policy synthesis. The Citadel Poll will lead survey design, fielding, weighting, and reporting under the project team structure.
Subcontractors	The Citadel Poll's DuBose Kapeluck and Mark Owens will conduct the population studies and survey of the city. The materials for the survey will come from South Carolina based companies. No other subcontractors are anticipated unless approved by the City.
Insurance and contracting	The University of South Carolina will provide the required insurance and indemnification documentation before work begins.

2. Project Team

Institution	Team member	Primary responsibility	Relevant contribution
University of South Carolina / EPiC	Kara Jones	An STR subject-matter expert, she will handle analyses of STR regulation, property-tax compliance, housing-market analysis, and test selected scenarios.	A doctoral candidate in Economics at the University of South Carolina. Her research spans regional development, tourism, urban economics, and tax policy. Her STR research examines how third-party reporting and regulatory visibility affect property-tax compliance and host behavior.
University of South Carolina / EPiC	Orgul Ozturk	Research lead: applied economic analysis, project oversight, agency engagement, and quality assurance.	As the head of EPiC, she will lead the study design and integrate all workstreams. Dr. Ozturk brings experience collaborating with local and statewide agencies and businesses and connecting applied economic research to policy decisions.
University of South Carolina / EPiC	Sarah Carroll	Economic impact analysis; local government comparisons; staff coordination; attention to stakeholders; and policy translation.	Dr. Carroll has calculated economic impacts for many South Carolina policies and programs. She brings experience working with local and statewide agencies and businesses, supporting a study process that is responsive to staff needs and understandable to decision-makers and residents.
The Citadel	Branwell DuBose Kapeluck	Design and oversee the resident and stakeholder survey strategy; c the contextualizing the impact of survey results.	Dr. Kapeluck brings a vast amount of local knowledge and experience having taught at The Citadel since 2002. He is also an expert on urban politics, public administration, and government in South Carolina.

Institution	Team member	Primary responsibility	Relevant contribution
The Citadel	Mark Owens	Questionnaire design; fielding the survey; weighting the data; drafting the survey report.	Dr. Owens has conducted polling in the state, with media-market specific analyses since 2024. He also brings practical knowledge of local survey design and community sentiment measurement, having completed multiple projects in small geographic areas.

Resumes/CVs and a short organizational profile are included as attachments. The project manager will be Professor Orgul Ozturk and Dr. Mark Owens will serve as a local point of contact.

3. Relevant Prior Work and References

“Closing the Airbnb Tax Loophole” was the most recent policy brief published by the South Carolina Economic Policy Center (EPiC).¹ The research on short-term rental regulations center by the University of South Carolina’s Darla Moore School of Business was prepared to inform the public about this issue in public finance with research done by Kara Jones is a doctoral candidate in Economics. Her research on short-term rental markets also includes, “Exempt, Evade, Enforce: Unpacking Property Tax Dynamics in the Short-Term Rental Market,” which examines STR host behavior using Airbnb and VRBO data from 2015-2024 in Florida. The research evaluates how third-party reporting and regulatory changes influence compliance around a rental-day threshold tied to owner-occupied tax treatment. This experience is directly relevant to Folly Beach’s need to assess license categories, legal-residence status, compliance incentives, and the fiscal implications of ordinance design.

The expertise in public finance within the South Carolina Economic Policy Center (EPiC) will be enhanced by survey research to include local context in the evaluation of all the policy recommendations. A specialty of The Citadel Poll is to conduct survey research projects at the state level and in small geographic areas, like municipalities. The Citadel has the expertise to use different forms of communication to invite individuals to take a survey. The combination of modes not only allows individuals to complete a survey in the way they feel most comfortable, but each

¹ Source: Jones, Kara. 2026. EPiC Policy Brief, “Closing the Airbnb Tax Loophole” (September 2026).

invitation is also a contact that builds the legitimacy of the survey for those who are hesitant to participate.

The three references below represent past projects involving research at the municipal level. The references are complete with names, organizations, roles, phone numbers, email addresses, project dates, and a description of the team’s experiences studying small and specific geographic areas.

Reference 1	Professor Scott Curtis, Director of the Lt. Col. James Near Center on Climate Studies at The Citadel, (843) 953-6781, wcurtis1@citadel.edu A grant was given to The Citadel Poll to enhance data collection in coastal areas to examine patterns in how the public has adapted to the current climate in South Carolina. The first wave of this work took place in May 2026.
Reference 2	Professor Ken Wink at The University of Texas at Tyler, (903) 566-7368, kwink@uttyler.edu Dr. Mark Owens was contracted to complete a project for UT Tyler’s client Neighbors Working Together. The survey included interviews with 403 adults in Smith County, Texas (population, 259,000 residents).
Reference 3	Dr. Emily Goldmann, Clinical Associate Professor of Epidemiology at Boston University, (617) 358-3728, esg@bu.edu Dr. Mark Owens led the Southern Cities Study, which interviewed 1,688 adults in Atlanta, Austin, Dallas, Houston, and New Orleans. This project focused on the acceptance of wearing masks and stress from perceptions of discrimination early in the COVID-19 pandemic. An article based on this survey was published in the <i>Journal of Affective Disorders</i> and has been cited in academic articles 73 times.

4. Work Plan and Milestones

Timing	Milestone	City decision point
October 2026	Kickoff; records/data request; Council pre-study work session(s); confirm study charter.	Approve scenarios, success criteria, sources, and decision-matrix framework.

Timing	Milestone	City decision point
November 2026	Data assembly, ordinance timeline, baseline analysis, and survey/instrument design.	Review data gaps and approve survey fielding plan, if used.
December 2026	Cap impact analysis; contextual trends; stakeholder research; preliminary peer review.	Receive interim briefing on emerging results and scenario assumptions.
January 2027	Scenario modeling; decision matrix; draft recommendations and implementation options.	Review preliminary matrix and clarify questions for final study.
February 2027	Final study and presentation; post-study in-person Council work session.	Select preferred alternatives for adoption consideration.

This work plan is designed to meet the City’s stated deadline while preserving time for Council alignment and quality review. Any material delay in obtaining requested administrative data, approvals, or third-party data licenses will be raised promptly with a mitigation plan.

5. Impact Analysis of Existing Policy & Future Options

The research team has been assembled to evaluate the impacts of the 2023 Short-Term Rental Cap and examine the impact of possible amendments through several studies using the best and most appropriate methodology. The team will use empirical analyses and resident interviews to provide the City of Folly Beach with a decision matrix, implementation recommendations, and a review of comparable regulations.

There is a team member with the appropriate subject area expertise to provide each of the requested concerns. This includes the expertise to evaluate effects on the local housing market, the financial position of license holders, long-term rentals and legal residences, municipal revenues and costs, local business revenue, neighborhood livability, and resident satisfaction.

Each study will carefully communicate the effect of a Short-Term Rental policy since January 1, 2022, and inform immediate, medium, and long-term projections. The studies will also apply the current policy categories that distinguish owner-occupied short-term rental (OSTR) licenses, which permit up to 72 rental nights annually for legal residences, from investor short-term rental (ISTR) licenses, which permit unlimited rental nights and are capped at 800. Additionally, we

bring to this study a local knowledge that will also allow us to contextualize the findings with observed variation that may exist from Center Street to the Washout neighborhoods.

Our approach is intentionally designed around those decision needs. After a brief meeting with the City to ensure our research design is approved, we will provide updates about the progress of the program every two weeks from November 1 to February 15. This approach is set up to ensure the final presentation, before February 27, 2027, is as dynamic and informed as it can be for everyone in the audience.

6. Technical Approach and Scope of Work

Phase 1 - Discovery and Council Alignment

We would like to hold at least three work sessions with Council and consult closely with City staff (in-person or on Zoom). Before analysis begins, we will document a shared study charter that fixes the scenario language, success criteria, primary outcomes, data sources, comparison geographies, and decision rules. This upfront agreement protects the City from an analysis that is technically sound but misaligned with Council intent.

- Translate the six amendment areas into precise policy scenarios that cost-benefit analyses can be allied to identify the number of alternatives within each area that are easily understood by the community.
- Establish baseline expectations, measurement windows, and thresholds for immediate, medium-term, and long-term projections.
- Confirm data access, privacy protections, and how survey invitations can encourage broad participation while using specific protocols to avoid any undue influence on the sample.
- Agree on the weighting or prioritization method to be used in the final decision matrix.

Phase 2 - Baseline, Cap Impact, and Market Context

We will construct a pre- and post-Cap profile using the January 2022-to-present period. The analysis will combine a Folly Beach time series with carefully selected contextual trends for the Charleston metropolitan area and national markets. Rather than attributing every observed change to the Cap, we will explicitly consider confounding forces such as interest rates, insurance costs, post-pandemic travel patterns, seasonal demand, housing supply, and regional economic conditions.

Depending on final data availability, we will use descriptive trend analysis, event-study or difference-in-differences comparisons, matched comparison areas, and scenario-based financial modeling. We will clearly distinguish observed effects, modeled effects, and qualitative stakeholder findings. Each method will be documented in plain language and in a technical appendix sufficient for review.

The survey responses from the project will ensure the policy advice is informed by the City of Folly Beach’s residents. The importance of ensuring the validity of the local resident opinions extends from the unique demographics of Folly Beach compared to any other sea island in the area. According to the American Community Survey 2024 5-year estimates, the residential population on Folly Beach has the highest portion of residents working in the arts and food service, outside of Tybee Island, Georgia.

Phase 3 - Scenario Modeling and Decision Matrix

For each Council-approved alternative, we will estimate direction, magnitude, and uncertainty across the City’s agreed metrics. We will model the immediate period (0-12 months), medium term (1-3 years), and long term (3+ years). Where data cannot support a single precise estimate, we will provide low, central, and high cases linked to explicit assumptions.

The decision matrix will present each scenario against the agreed success criteria, show tradeoffs transparently, and separate evidence strength from policy preference. It will be designed as an implementation tool: Council will be able to see not only which alternatives score highly, but why, under which assumptions, and what administrative changes each alternative would require.

Phase 4 - Comparable Ordinances and Implementation

We will review short-term rental ordinances and implementation practices in comparable coastal, popular among tourists, and small municipality settings. The review will focus on policy language and operational lessons relevant to Folly Beach: caps and waiting lists; owner occupancy verification; transfer, replacement, and inheritance rules; multifamily and commercial treatment; hardship pathways; enforcement; data sharing; fees; and periodic review provisions.

Table 1: Comparable Coastal Municipal Areas

City	STR Ord. Establish ed	Population (Census 2020)	Housing Units (ACS 2024)	Occupied Units (ACS 2024)	Arts, Ent., & Food	Retail
Folly Beach	2023	2,078	2,221	619	17.5	6.8
Edisto Island	2020	1,033	2,160	613	12.6	4.4
Fripp Island*	2020	963	1,602	442	8.8	11.5
Hilton Head	2023	37,661	30,112	18,326	14.7	12.6
Isle Of Palms	2020	4,347	4,588	2,043	11.0	4.0
Kiawah Island	2019	2,013	3,865	1,211	4.3	11.9
Sullivans Island	2003	1,891	1,088	798	7.5	4.2
St. Simons, GA	2019	14,982	11,233	7,829	11.3	12.4
Tybee Island, GA	2024	3,114	3,227	1,464	19.3	5.3

* A Beaufort County ordinance covers the unincorporated Fripp Island

This is important, because the City of Folly Beach is truly a unique community along the sea islands of South Carolina and Georgia. A quick review of Census data from the cities below shows

that the City of Folly Beach has a population size that is like Kiawah Island but twice as large as Edisto Island. The population estimates for area of employment on the island are also unique, because 17.5 percent of those in the City of Folly Beach work in the Arts, entertainment, and recreation, and accommodation and food services industry. That is the highest concentration along the sea islands, except for Tybee Island, Georgia. The larger comparison of neighboring municipalities is also relevant, because communities in this area have updated their short-term rental ordinances as recently as the summer of 2026.

Phase 5 - Reporting and Council Work Session

We will deliver a clear written study, a decision-making matrix workbook, a public slide presentation, and a final in-person work session with Council. The work session will explain the Cap impact results, methodology, scenario rankings, and implementation choices, and will facilitate a structured discussion of preferred alternatives.

7. Preliminary Data, Sources, and Methodologies

Impact area	Potential data types and sources	Preliminary analytical approach
Housing market	MLS/listing data; property transactions; assessed values; building permits; rental listings; Census/ACS; regional comparators.	Trend and composition analysis; matched/geographic comparison where feasible; assess shifts in prices, inventory, tenure, and long-term rental availability.
License holders and legal residences	City license records; renewal, expiration, transfer, and hardship records; county assessor/tax records subject to access; voluntary owner survey/interviews.	Cohort analysis of pre-Cap license holders; scenario cash-flow comparisons; track changes in legal residence claims and OSTR/ISTR status.
Municipal revenue and costs	City finance, business-license, accommodation-tax, permit, code enforcement, public safety, sanitation, parking, and administrative records.	Revenue/cost attribution framework; incremental-cost analysis; sensitivity analysis for license, tax, compliance, and enforcement assumptions.

Impact area	Potential data types and sources	Preliminary analytical approach
Local businesses and tourism	Accommodation demand indicators; STR platform or licensed data if available; visitor/tourism data; survey interviews; sales tax aggregates where available.	Seasonality adjusted trend analysis; scenario demand shifts; qualitative evidence on visitor spending and operating conditions.
Livability and satisfaction	The resident survey and listening sessions will give insight to options for a cap through structured interviews. We will also review public records regarding complaints and code enforcement records, public safety calls, parking/noise data.	Scientifically designed survey with weighting plan; theme coding; trend analysis of complaints and service demands; disaggregate results by residency and license status when appropriate.

Our final data selections will be confirmed with Council and staff during the pre-study work session.

8. Amendment Scenarios and Modeling Plan

In our initial meeting with the Council, we will work to authorize one base case example and one to three clearly distinct alternatives in each area to guide our detailed analysis. The establishment of a base case example keeps the model focused, anchors all comparisons, and gives greater context for decisions.

In the table below we provide the scenario we feel best represent each of the six amendment areas identified in the RFP in the center column. The column on the right explains the metrics we will use to measure the policy impact of each policy in the given scenario framework.

Amendment area	Preliminary scenario framework	Key metrics
Existing cap	Current policy as the base case; possible implementation/enforcement variants.	License mix; housing availability; revenues/costs; complaints; fairness to existing holders.

Amendment area	Preliminary scenario framework	Key metrics
72-day rentals for all properties	All properties eligible for a limited rental option; variants defined by eligibility and verification.	Long-term rental conversion risk; legal residence claims; license holder financial effects; compliance burden.
Multifamily/commercial exemption	Exemption by zoning district, use type, project characteristics, or other Council defined conditions.	Housing units affected; visitor capacity; business activity; neighborhood impacts; administration.
ISTR replacement continuity	Retain ISTR status after replacement under defined timing, ownership, and rebuilding rules.	License certainty; redevelopment incentives; ISTR inventory; equity; and enforcement.
ISTR transferability	Transfer on sale, family transfer, inheritance, or defined successor events.	Asset value; market concentration; cap integrity; administrative burden; legal/operational feasibility.
Hardship exceptions	Broaden qualifying circumstances and review process; define duration, proof, and appeal rules.	Equity; transparency; caseload; consistency; number of additional licenses and cap effects.

9. Contextualizing the Cap Against Broader Trends

A central risk in STR policy evaluation is mistaking a broader market change for a local ordinance effect. We will use multiple comparison strategies rather than relying on a single before-and-after chart. Final selection will depend on data availability and diagnostics, but will include the following elements:

- Time-series analysis that separates seasonal patterns from longer-run change and identifies timing around key ordinance milestones.
- Charleston and national benchmarks for housing, tourism, and macroeconomic conditions.
- Matched or comparison-community analysis when an appropriate peer group can be identified and pre-policy trends are sufficiently similar.
- Sensitivity tests that show how conclusions change under reasonable alternative assumptions about demand, supply, compliance, and enforcement.

- A transparent evidence-based rating for each finding, which will provide strong quantitative support, directional evidence, or qualitative insight.

10. Stakeholder Engagement and Public-Opinion Research

The project will use stakeholder input as evidence, not as a substitute for evidence. DuBose Kapeluck and Mark Owens, who manage The Citadel Poll, will implement a survey design that enables City Council to hear from residents, property owners, license holders, businesses, and other affected groups in a way that is transparent about sample, weighting, and limitations. The team will also recommend targeted interviews or small-group sessions when they add insight into implementation realities.²

Before fielding any survey, the team will submit a proposed questionnaire, sampling plan, anticipated response target, weighting approach, outreach methods, schedule, and reporting format for City review. The final report will disclose methodology and avoid overinterpreting small or unrepresentative respondent groups.

The survey will follow a set of structured protocols that are intended to validate each participant without creating a hurdle for their participation. This household population survey of Folly Beach will invite all residences on the island with a letter that includes all details residents of the household need to complete the survey. Each letter will include a short and accessible URL associated with sc.edu or poll.citadel.edu, where they will find a link to enter the survey. The survey will then ask a person to verify the short code on the letter. Should a person prefer to access the survey directly, a QR code will also be in the letter, which will take a resident to directly to their unique survey entry. Our budget and research design anticipate sending letters to all the 1,349 unique addresses in the address-based sample we can purchase and as many as 900 follow-up emails for those who do not participate in the first two weeks.

We will then send a text message (SMS) to the households which have a known mobile phone number matched to the address. This mode is an attempt to deliver the same survey in a different way. We will use the same access codes paired with the address from the mailed letters. Each text message will introduce the project, provide a link to enter the survey, and remind the residents of their unique access code. The benefit of using a list of addresses with an open survey is that a person can enter a unique code is that the survey can remain anonymous, but we can place which geographic area a survey came from. Then for any questions where a person is required to state their name and street address, they could choose to do so. The unique codes are important to maintain eligibility and ensure quality control of the survey from any bias. Dr. Owens will be able

² This approach follows how a 2017 Taskforce used public opinion to advise the City of Charleston. Two surveys were conducted ([HomeAway 2017](#); [SurveyMonkey 2017](#)) and listening sessions was held ([Post & Courier 2017](#)).

to make sure that the codes correspond with known addresses and monitor how often a code is used. A valuable benefit to this mail-to-web and text-to-web distribution is that we distribute the survey through the Qualtrics software platform that also captures the geographic place a survey is taken (with a close approximation to protect the privacy of each survey participant. The survey is designed to give multiple paths for a resident to participate at their convenience and share their thoughts independently.

The resident survey that we have designed operates to reach the whole population, not simply a random sample. Therefore, the results can be interpreted directly as what the city would like or has observed. For those who frequently follow polls and are attuned to checking the margin of error, that does not apply in the same way in a population survey. Pollsters report the margin of error, because the entire population did not participate but also only a portion of the population was invited to participate. For this study we will still use the margin of error to guide our goals in designing a project with precise results. As a guide, 325 surveys would be needed to maintain a margin of error of plus or minus five percent when interpreting the results, when the population is 2,000 residents. Around that mark, the margin of error will decrease by 0.2 as 25 more completed surveys are found or increase by 0.2 if 25 fewer surveys are completed. As a reference, the November 2025 election saw almost 1,250 ballots cast.

The key to a useful questionnaire is that it is short, simple, and all questions serve a purpose for the City. Our initial suggestion to the Council is to organize closed-ended questions into segments like:

Demographic information, which requires questions that ask age, education, gender and race. We also encourage including questions about length of residence in the state that have served The Citadel Poll well. This way the analysis can be broken down to show who has moved to an area in the last 5 years, 5 to 10 years ago, more than 10 years ago, or always lived there. The residency question also becomes more valuable when it is paired with a short question to determine if someone was moving back to the area they lived in before or is new. This last piece of demographic information serves as an important detail to see what other areas of the country residents might be most familiar with when we offer national and state comparisons to Folly Beach.

Applicability of the Short-Term Rental Ordinance, which can be measured by whether a respondent resides on Folly Beach and if they own other rental properties (short-term or long-term). It is also valuable to give residents an opportunity to acknowledge if they have noticed a cluster of short-term rentals in their immediate surroundings. These answers will be useful to justify if the survey responses are representative of the empirical trends that can be found from a comparison of where permits were given on the island.

Livability and satisfaction, which require a few different perspectives to understand the local concern about ways rental properties should be considered. The questions can focus on the value of tourism to Folly Beach's economy as well as the costs for the municipality. There should be a space to focus questions about what is observed near the place of residence and what has been observed (or is expected) for other areas of the island, especially Center Street. This is also a time in the survey where it is rational to ask a respondent whether they have noticed an improvement in their local neighborhood after the initial ordinance was adopted in 2023.

Approval of STR ordinance options, this segment will require a question about the cap on short term rentals and each of the five other proposed amendments (72-day limit, exemptions, replacement of a unit, transfer of a license, and hardship exceptions. Our advice is to breakdown the questionnaire to focus on each individual choice, for example residents would be asked about the exception for multifamily or additional dwelling units (ADUs) separately from commercially zoned properties.

In addition to the survey, we have proposed hosting two listening sessions where the public opinion experts from The Citadel will lead semi-structured interviews along the same topics as the resident survey. The listening sessions will also provide a venue to engage business owners about what immediate, midterm, and long-term concerns they have about uncertainty of what Short-Term Rental Ordinance will be put in place.

11. Deliverables

Deliverable	Purpose	Format
Study charter and data plan	Records Council agreement on scenarios, outcomes, sources, methods, schedule, and decision rules.	Brief memo after pre-study work session.
Baseline and Cap impact analysis	Explains observed change from January 1, 2022, to present and its relationship to the Cap.	Written study with methods appendix and supporting exhibits.
Local Survey of Adults	Ensure the validity of assumptions about how the local population understands the STR policies.	Summary memo, topline estimate report, and raw data.
Scenario projections	Estimates immediate, medium-, and long-term impacts of Council-approved alternatives.	Scenario workbook/matrix plus narrative.
Decision matrix and recommendations	Ranks alternatives against City-defined success criteria and identifies implementation implications.	Council-ready matrix and recommendations.
Comparative ordinance review	Provides policy language and implementation lessons from similar communities.	Annotated policy review appendix.
Public presentation and final work session	Reviews results, answers questions, and facilitates selection of preferred alternatives.	Slide deck and in-person Council session.

12. Pricing and Cost Transparency

Cost component	Proposed fee / rate	Notes
EPiC research, analysis, and reporting	\$30,981	Includes project management, economic analysis, ordinance review, report writing, and presentation preparation.
The Citadel Poll survey services	\$21,995	All aspects of the survey are included in this quote. This encompasses survey design, fielding the survey, weighting, analysis, and finalizing a report. It also covers the listening sessions and demographic research the two professors will provide.
Total not-to-exceed project fee	\$52,976	A budget narrative shares the specific items that sum to this amount.

A. Senior Personnel with EPiC at the University of South Carolina:

1. Project Manager: Dr. Orgul Ozturk will be responsible for the following components: (1) overseeing grant activities; (2) coordinating logistics within the project team; and (3) quality assurance.

Salary is based on a flat rate of \$5,000.

2. Dr. Sarah Carroll will be responsible for the following grant activities: (1) economic impact analyses; (2) assists in communications with the City of Folly Beach; and (3) translating policy information.

Salary is based on 1 month for a total of \$10,000.

B. Graduate Student Personnel at the University of South Carolina:

Kara Jones (Ph.D. candidate in Economics) will be responsible for the following grant activities: (1) housing market analysis; (2) testing scenario methods of STR regulations; and (3) evaluating property-tax compliance.

Salary is based on 20 hours of work per week for 12 weeks at the rate of \$25 per hour for graduate assistance for a total of \$6,000.

C. Fringe Benefits:

The fringe benefits for Dr. Sarah Carroll and Dr. Orgul Ozturk are a total of \$7,140.

The fringe benefits for a graduate student are \$24.

D. In-Direct Costs:

The USC Business Partnership Foundation has an indirect rate of 10% on contracts with the Darla Moore School of Business. This is a total of \$2,817

E. Other Direct Costs related to the collaboration with The Citadel Poll.

1. Senior Personnel:

Dr. DuBose Kapeluck will be responsible for the following grant activities: (1) oversee the resident survey strategy; (2) leading the listening sessions; and (3) contextualize the impact of survey results.

Salary is based on one-half of one month salary for a total of \$5,698.

Dr. Mark Owens will be responsible for the following grant activities: (1) questionnaire design; (2) fielding the survey; (3) weighting the data; (4) drafting the survey report; and (5) transcribing responses from the listening sessions.

Salary is based on one-half of one month salary for a total of \$4,324.

2. Fringe Benefits:

Salaries for employees at The Citadel have a 37.31% fringe rate.

The fringe benefits for Dr. DuBose Kapeluck and Dr. Mark Owens are a total of \$3,740.

3. Institutional in-direct and overhead expenses.

The Citadel has a negotiated indirect fixed rate of 45% based on salaries and fringe, which is a total of \$6,193.

4. Other Direct Costs (Lists, Mailings, and Messages)

- Purchase a list of 1,349 mailing addresses in the City of Folly Beach. A quoted cost of \$608.

- Print and mail 2,200 letters and envelopes. A quoted cost of \$1,182.
- Send 1,500 SMS survey invitations. A quoted cost of \$250.

13. Statement of pending legal actions:

There are no pending legal actions that apply to the South Carolina Economic Policy Center (EPiC) or The Citadel Poll.



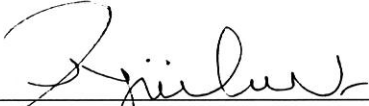
REQUEST FOR PROPOSALS (RFP 03-26)
CITY OF FOLLY BEACH SHORT-TERM RENTAL ORDINANCE STUDY

Vendor Name: ORGUL OZTURK / SC Economic Policy Center ^{Department of Economics}

Offeror Representations

I certify that:

1. I am an agent of the company authorized to make representations on behalf of the company.
2. I have read and understand the solicitation.
3. I have not in any way colluded with anyone to obtain information that would give me an unfair advantage over others or set pricing for the proposal.
4. I (alongside the Company) am qualified to perform the services required by the solicitation.

 9/28/2026
Authorized Signature for Bidder/Offeror & Date

Before me, the Undersigned, a Notary Public, for and in the County and State aforesaid, personally appeared _____ and made oath.

Sworn to and Subscribed before me

this 28 day of September, 2026



Notary Public in and for South Carolina

exp. 4/4/27

**Request for Taxpayer
Identification Number and Certification**

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) UNIVERSITY OF SOUTH CAROLINA SYSTEM	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☒ Other (see instructions) STATE GOVERNMENT	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) 3 Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) C <i>(Applies to accounts maintained outside the United States.)</i>
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐	
	5 Address (number, street, and apt. or suite no.). See instructions. 1600 HAMPTON STREET, CONTROLLER'S OFFICE 6TH FLOOR	Requester's name and address (optional)
6 City, state, and ZIP code COLUMBIA, SC 29208		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
			-				-			
or										
Employer identification number										
5	7		-	6	0	0	1	1	5	3

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person <i>Mandy M Killeen</i>	Date 01-05-2026
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.–China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.–China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called “backup withholding.” Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under “*By signing the filled-out form*” above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or “doing business as” (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner’s name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

RESEARCH LETTER OF AGREEMENT

Between: City of Folly Beach

And: University of South Carolina
1600 Hampton Street, Suite 805
Columbia, SC 29208
Contact: Brad Manzo
Phone: 803-777-4452
E-mail: bmanzo@mailbox.sc.edu

Project Period: 11/1/2026 - 3/15/2027

Total Funding: \$X

1. SCOPE OF WORK –
As appropriate to the call. As described in the attached proposal.
2. KEY PERSONNEL –
As appropriate to the call. As described in the attached proposal
3. DIRECTION OF RESEARCH –
As appropriate to the call. As described in the attached proposal.
4. FUNDING AND PAYMENT –
As appropriate to the call. As described in the attached proposal.
5. INTELLECTUAL PROPERTY - The Sponsor and USC agree that, if patentable discoveries or inventions should result from work performed under this Agreement, USC shall retain the entire right, title and interest to each subject invention, except that the Sponsor shall have a non-exclusive, non-transferable, irrevocable, paid-up license to use such discoveries or inventions.

USC is free to copyright any books, publications, or other copyrightable materials developed in the course of or under this agreement, but the Sponsor shall receive a royalty-free, non-exclusive and irrevocable right to reproduce, publish, or otherwise use, and to authorize others to use, the work for Sponsor purposes.
6. PUBLICATIONS - USC engages only in research that is compatible, consistent and beneficial to USC's academic role and mission and therefore, significant results of research activities must be reasonably available for publication. USC agrees to keep confidential any Sponsor proprietary information supplied to it by the Sponsor during the course of research under this Agreement. In any such publication full credit shall be given the Sponsor and every person having made a significant contribution to the results obtained.

7. SPONSOR CONFIDENTIAL/PROPRIETARY INFORMATION - Upon commencement of the Economic Impact Study, USC will receive confidential and/or proprietary information from or about Project Explorer. USC agrees to maintain the confidentiality of such information and to use it solely for purpose of the Economic Impact Study. Confidential information shall not be disclosed to any third party without prior written consent, except as required by law. These confidentiality obligations shall survive the completion or termination of this engagement.

8. NOTICES - All notices and communications in connection with this Agreement will be addressed to the following:

Folly Beach City Council

Name:

Title:

Phone:

Email:

University of South Carolina

Name: Brad Manzo

Title: Sponsored Programs Administrator

USC Sponsored Awards Management

1600 Hampton Street, Suite 805

Columbia, SC 29208

Phone: 803-777-4452

Email: bmanzo@mailbox.sc.edu

9. TERMINATION - Either USC or Sponsor may terminate this Agreement by giving thirty (30) days written notice to the other. In the event of such termination, USC will cease further obligation of project funds and will take all reasonable steps to cancel or otherwise reduce outstanding obligations. Sponsor will be obligated to pay actual costs and firm commitments to the date of termination not to exceed the total value of this Agreement.

10. AMENDMENTS - Any amendments to this Agreement must be in writing and signed by authorized representatives of USC and Sponsor.

Agreement of USC and Sponsor in the terms stated above is indicated by signatures below.

Folly Beach

University of South Carolina

Lauren Angelo Duck

Assistant Director, SAM

Date: _____

Date: _____

KARA JONES

1014 Greene Street, Columbia SC, USA 29208

Email: karajones963@gmail.com | Website: kjonesecon.com

EDUCATION

Ph.D. Economics, University of South Carolina, expected May 2027

B.S.B.A. International Business and Economics, University of South Carolina Honors College, 2018

FIELDS OF SPECIALIZATION

Primary: Public Finance

Secondary: Regional Development, Urban Economics, Applied Microeconomics

DISSERTATION

Place, Policy, and Poverty: Essays on the Limits and Possibilities of Local Economic Intervention

Committee: Prof. Jason DeBacker (chair), Prof. Doug Woodward, Prof. Danna Thomas, Dr. Veronika Penciakova

JOB MARKET PAPER

["Exempt, Evade, Enforce: Unpacking Property Tax Dynamics in the Short-Term Rental Market."](#)

How does third-party reporting shape property tax compliance? Local governments rely primarily on property taxes for funding public services, yet compliance heavily relies on self-reported property use with little verification. STR hosts can exploit this verification gap by managing rental activity to retain owner-occupied exemptions. Using Airbnb and VRBO data from 2015–2024 in Florida, I apply a bunching estimator at the state's 30-day rental-day exemption threshold and exploit an enforcement shock to detect tax evasion. The enforcement shock sharply changes host behavior. Bunching near the threshold is negligible beforehand but grows substantially after, with hosts cutting bookings by more than 16 nights. This bunching behavior translates to estimated revenue effects of \$15 million over the analysis period. These results demonstrate that even lenient third-party reporting generates meaningful compliance gains and suggests that data-sharing could meaningfully strengthen compliance in decentralized tax systems.

PEER REVIEWED PUBLICATIONS

["Reindustrialization Meets Rural Reality: The Limits of FDI Led Development."](#)

Published at *Contemporary Economic Policy*. Jul 2026.

WORKING PAPERS

["Poverty Reduction or Relocation? Long-Run Neighborhood Change Following Place-Based Policy."](#)

"Efficacy of Local Flavored E-cigarette Bans." with Danna Thomas and Roxana Gonzalez-Cortes.

"Short Run Impacts of Place-based Economic Incentives." with Jason DeBacker.

OTHER PUBLICATIONS

["Game Theory and Why Economists Are Talking About 'Geeconomics' Again."](#)

Published at *Common Good*. June 2026.

["Closing the Airbnb Tax Loophole."](#) Policy Brief through [SC EPiC](#) (Economics Policy Center)

Darla Moore School of Business, University of South Carolina. September 2026.

TEACHING EXPERIENCE

Instructor, Honors College Senior Thesis Proseminar (undergraduate), University of South Carolina, Fall 2026

Instructor, Introduction to Economics (undergraduate), University of South Carolina, Spring 2026

Teaching Assistant, University of South Carolina, Fall 2021 – Spring 2026
Undergraduate level: Public Finance, Game Theory in Economics, Political Economy, Industrial Organization, Intermediate Microeconomics, Introduction to Economics, Introduction to Macroeconomics, Introduction to Microeconomics
Graduate level: Applied Microeconomics
Fulbright English Teaching Assistant, Escola Andoranna, 2018-2019

RESEARCH AND RELEVANT WORK EXPERIENCE

AEA 2025 Research Fellow, Federal Reserve Bank of Atlanta, Summer 2025
Global Business Development Intern, South Carolina Department of Commerce, Summer & Fall 2023
Senior Consultant – Change Management and Learning, IBM Consulting, 2019 - 2022

GRANTS AND AWARDS

Darla Moore School of Business Doctoral Fellows Award, 2024 & 2026 - \$12,000 fellowship
University of South Carolina Graduate School Travel Grant, 2022 & 2026 - \$1,300 grant
Research Fellowship at Atlanta Federal Reserve Bank, Summer 2025
Southeastern Annual Economic Conference Graduate Student Award, 2024
Special Sworn Status, U.S. Census Bureau, 2023 - Present
Smith Richardson Foundation, 2023 – 2027, Co-PI, \$276,834 grant
U.S. Fulbright Grantee: Andorra, 2018 – English Teaching Assistantship
Dean's Award for Undergraduate Achievement, 2018

CONFERENCE AND SEMINAR PRESENTATIONS

2027: American Economic Association (AEA) Conference (scheduled)
2026: Southern Regional Science Association Meeting (also a discussant), American Real Estate and Urban Economics Association International Conference, Clemson University Public Economics Workshop, Federal Statistical Research Data Center Annual Research Conference (scheduled), South Carolina State University (scheduled), College of Charleston (scheduled), Winthrop University (scheduled), Center for Economic Studies (scheduled), Southeastern Annual Economics Conference (scheduled)
2025: Evaluation of the Economic Impact from Short-Term Vacation Rentals Workshop, Atlanta Federal Reserve Bank, University of South Carolina Economics Department
2024: Southeastern Annual Economics Conference (also a discussant)
2022: Southeastern Annual Economics Conference

LANGUAGES

English (native), French (proficient), Spanish (intermediate), Mandarin Chinese (basic)

COMPUTATION SKILLS

Python, Stata, Latex, Git, SAS, Unix command line, zTree, WordPress

CERTIFICATIONS & MEMBERSHIPS

Ethical Human Research for Social and Behavioral Researchers (CITI Program), 2024 –2027
IBM Service Corps Alum, IBM, 2021
PhD Project, Member of Finance and Economics Doctoral Student Association
Association for Christian Economists, Member

ACADEMIC SERVICE

2026: Panelist for Fulbright Exploration Event, Fulbright Evaluation Committee Member – ETA to Senegal
2025: Fulbright Evaluation Committee Member – ETA to Belgium and Spain
2024: Fulbright Evaluation Committee Member – ETA to Andorra and Moldova, Volunteer SC High School Econ Day
2023 & 2022: Volunteer SC High School Econ Day

Sarah Isa Carroll

University of South Carolina | Darla Moore School of Business

1014 Greene Street | Columbia, SC 29201

Office: 803-777-5919

Email: sarah.carroll@moore.sc.edu

Education

Ph.D. Economics	University of Wisconsin-Milwaukee	2017
M.Sc. Economics	Justus-Liebig-University Giessen, Germany	2016
B.Sc. Economics	Philipps-University of Marburg, Germany	2011
Dissertation Title: The International Trade Credit Channel: Implications for Industry Performance		

Academic Positions

Clinical Associate Professor, University of South Carolina	2024-present
Clinical Assistant Professor, University of South Carolina	2017 to 2024
Graduate Instructor, University of Wisconsin-Milwaukee	2014-2017
Student research Assistant, Philipps-University of Marburg	2010-2011

Areas of Interest

Research: International Trade and Finance, Monetary Economics, Applied Econometrics

Teaching: Microeconomics, Macroeconomics, Economics of Personal Finance, International Finance, International Trade, Introductory Econometrics

Publications

Sarah Carroll, Rebecca Neumann, “*The importance of international trade credit for industry investment*”, Journal of Economics and Business, 2022.

Working Papers

2025: “*Transmission of US Monetary Policy Shocks to Saudi Arabia: Evidence From a Local Projections Approach*” joint with Matteo Passaponti

2024: “*Who can we rely on? Banks, Marketplace lenders, or People*” joint with Mahyar Ebrahimitorki, submitted.

2024: “*Understanding the Association between Preoperative Exercise Level and Post-Operative Outcomes of Mixed-Major Abdominal Surgery*” joint with Elizabeth Regan and Trado Mayson.

Technical Reports

2025: “Multipliers for the Effects of Preventing Unplanned Pregnancies: Socioeconomic effects of New Morning’s No Drama program in South Carolina” joint with Orgül Demet Öztürk, Kaleigh Strohl and Mohammad Jakaria

2025: “Economic ROI Analysis of Childcare Access and Workforce Investments in South Carolina” joint with Orgül Demet Öztürk and Jessica Brown

Teaching & Advising

Teaching

Principles of Microeconomics, Principles of Economics (Microeconomics and Macroeconomics), Principles of Macroeconomics, Economics of Personal Finance, Introduction to International Economic relations (intermediate international Trade and Finance class), International Monetary Economics, Introductory Econometrics.

Recipient of “*Alfred G. Smith Junior Award for Excellence in Teaching*”, Fall 2023

Advising

Nakhi, S., Master of Health Information Technology Internship Advisor (November 2024-August 2025)

Weisinger, L., Supervised research project funded by the Honor's college undergraduate student research grant; primary advisor “*Analyzing Chat GPT’s investment performance versus the Benchmark*” In-Process. (October 2023 - February 2026).

Dia, R., Undergraduate Honors Thesis Director, In-Process. (November 2023-May 2025)

Hynes, K., Undergraduate Honors Thesis Director, In-Process. (November 2023 - May 2025).

Huntley Crouch, A., Undergraduate Honors Thesis Director, In-Process. (November 2023 - January 2025).

Ebrahimitorki, M., PhD Thesis Committee Member and primary advisor, “*The effects of financial globalization during the financial crises, evidence from 2008 financial crisis and Covid 19 pandemic*”, In-Process. (January 2022 - January 2025).

Passaponti, M., Master’s Thesis advisor, “*Transmission of US Monetary Policy Shocks to Saudi Arabia: Evidence from a Local Projections Approach*” (January 2024-August 2024)

Wickremeratne, H. N., Master's Thesis Committee Member, “*The Global Production sharing and economic development: The nexus of preferential trade agreements and unilateral trade.*”, (February 2020 - July 2020).

Lees, O., Undergraduate Honors Thesis Director, “*Economic Valuation of the Great Barrier Reef*”, (April 2020 - May 2020).

Morris, J., Undergraduate Honors Thesis Director, *"Trade Finance in Emerging Markets"*, (August 2019 - April 2020).

Marousis, A., Undergraduate Honors Thesis Director, *"The Adoption of the Euro: Was Greece Destined to Fail?"*, (September 2018 - April 2019).

Starke, I., Undergraduate Honors Thesis Director, *"Central Bank Talk: The Evolution and Impact of Changes in Monetary Policy Communication"*, (September 2018 - April 2019).

Other student developmental activities

Student Experience Project community of practice. An initiative joint with the CTE and Provosts office to improve student experience, foster learning and increase student retention. (January 2025-ongoing)

Raising Scholars Cohort Program Mentor (August 2018 - May 2022).

Leading and supervising Econ-day activity *"Stranded on a deserted Island"* (April 2022).

First Generation Interest Group advising. An initiative by the provost's office to improve retainment and integration of first-generation students with a particular focus on first generation students in the Darla Moore School of Business. (August 2019 - December 2019).

Presentations/Discussions

Annual Meeting Wisconsin Economics Association, October 2016

Midwest International Trade and Theory Meetings, May 2018

EcoMod Macroeconomic Modelling Conference, July 2018

"Shaping Globalization - Economic Consequences and Policy Responses", Workshop for early career Economists, Johannes Gutenberg University Mainz, Germany, December 2023

ORGÜL DEMET ÖZTÜRK

Professor and Department Chair
South Carolina Economic Policy Center (SC EPiC)- Director
James A. Morris Chair in Economics
Co-President, Scholar Strategy Network South Carolina Chapter
Economics Department, Darla Moore School of Business,
1014 Greene Street, Columbia, SC 29208
Phone# 803-777-4904, e-mail: odozturk@moore.sc.edu
<https://sites.google.com/view/orguldemetozturk/home>

EDUCATION

Ph.D. in Economics	University of Wisconsin-Madison	2006
M.S. in Economics	University of Wisconsin-Madison	2003
B.A. in Economics	Koc University-Istanbul, <i>summa cum laude</i>	2000
B.A. in Sociology	Koc University-Istanbul, <i>summa cum laude</i>	2000

RESEARCH INTERESTS

Economics of Crime, Public Policy Analysis, Health Economics, Economics of Education

JOB EXPERIENCE

Professor, Dept of Economics, DMSB, University of South Carolina	2023-current
Associate Professor, Dept of Economics, DMSB, U. of South Carolina	2015–2022
Assistant Professor, Dept of Economics, DMSB, U. of South Carolina	2006 –2014

OTHER APPOINTMENTS AND AWARDS

SC Chapter President (joint with Jason DeBacker), Scholar Strategy Network	2026-current
Director, South Carolina Economic Policy Center, U. of South Carolina	2024- current
James A Morris Chair in Economics, U. of South Carolina	2024- current
Department Chair, Dept of Economics, DMSB, U. of South Carolina	2022-current
Director, SC Habitat for Humanity Board of Directors	2025- current
Member, South Carolina Maternal and Infant Health Task Force	2024– current
Member, South Carolina Labor Force Participation Task Force	2022– current
Research Fellow, Institute for Research on Poverty	2021-current
Member, Research Consortium on Children and Families	2013–current
Affiliated Scholar, Center for Research in Nutrition and Health Disparities	2011 – current
Faculty Associate, Walker Institute of International Studies	2006 – current
(Incoming) Vice President of Southern Economic Association	2025– 2027
AEA CSWEP Board Member, Southern Representative	2023– 2026
BPF Moore Fellow	2021– 2024
Member, South Carolina Birth Defects Advisory Council Research Group	2018– 2020
Economics PhD Program Director	2014– 2022
Member, Children’s Wellbeing Consortium	2015–2017
Voice of Public Health (as a Midland Mutual Aid founding member)	
South Carolina Association of Public Health	2020
Alfred G. Smith Award for Teaching Excellence	2019
Professor of the Year DMSB Doctoral Student Association	2019

NON-PEER REVIEWED PUBLICATIONS AND NOTABLE MENTIONS OF RESEARCH:

When does it Count? The Timing of Food Stamp Receipt and Educational Performance in Mathematics [NPR, Hidden Brain, Morning Edition](#)

Eat (and Drink) Better Tonight: Food Stamp Benefit Timing and Drunk Driving Fatalities

NPR, Hidden Brain, Morning Edition

Does the Timing of Food Stamp Distribution Matter? A Panel-Data Analysis of Monthly Purchasing Patterns of US Households Wall Street Journal, Real Time Economics

Four Charts That Show Who Loses Out if the White House Cuts Food Stamps
The Conversation (picked up by Salon.com among other places)

The Shutdown Brought People Who Rely on SNAP and Extra Helping of Economic Hardship
The Conversation

Having COVID-19 or being close to others who get it may make you more charitable
The Conversation

PUBLISHED OR FORTHCOMING WORK (*chronological order*)

The Long Run Effects of a Comprehensive Teacher Performance Pay Program on Student Outcomes (with Ozkan Eren and Sarah Cohodes, forthcoming at **Journal of Public Economics**, Accepted December 2025) (NBER WORKING PAPER 31056)

The Impacts of “Baby-Friendly” Hospital Designations on Infant and Maternal Outcomes (with Lindsey Woodworth and Danna Thomas, forthcoming at **Management Science**, accepted August 2025)

In-kind Government Assistance and Crowd-out of Charitable Services: Evidence from Free School Meals (with Krista Ruffini and Pelin Pekgun, forthcoming **Journal of Public Economics**, accepted April 2025) (NBER WORKING PAPER 33562)

School Accountability and Long Run Criminal Activity and Economic Self Sufficiency (with Ozkan Eren, Naci Mocan and David Figlio) (*forthcoming* at **Journal of Human Resources** -accepted Dec 2023)

Student Accountability, Exit Exams, and Long-Run Outcomes, 2025 (with Ozkan Eren) **Journal of Human Resources** Vol60 Issue 3

When do part-time workers increase effectiveness? A study of food banks and the SNAP program outreach (with Luv Sharma, Pelin Pekgun and Sanjay Ahire, (2024) **Journal of Operations Management**) (Accepted March 2024)

The Impact of Test Computerization on Measured Student Performance and Achievement Gap (2022) (with John Gordanier and Crystal Zhan) **Education Finance and Policy** 1-21 https://doi.org/10.1162/edfp_a_00373

Parochial Altruism and Political Ideology (2022) **Political Psychology** (with Nancy Buchan, Gianluca Grimalda, and Marilyn Brewer) <https://onlinelibrary.wiley.com/doi/full/10.1111/pops.12852>

Exposure to COVID-19 is Associated with Increased Altruism, particularly at the Local Level (with Nancy Buchan, Gianluca Grimalda, Giulia Urso, Ariana Pinate and Marilyn Brewer) **Nature-Scientific Reports** 11, 18950 (2021). <https://doi.org/10.1038/s41598-021-97234-2>

Does Distributing SNAP Benefits Later in the Month Smooth Expenditures? (with John Gordanier and Chad Cotti **Food Policy**, Volume 104, July 2021, 102123, ISSN 0306-9192

Prescription Drug Monitoring Programs and Opioid Prescriptions for Disability Conditions (with Yuan Hong, Suzanne McDermott and Margaret Turk) **Applied Health Economics and Health Policy**, 19(3), 415-428, May 2021

Opioid Prescriptions and the Educational Performance of Children (with John Gordanier and Chad Cotti) *Social Science and Medicine* Volume 265, November 2020, 113406

Free Lunch for All! The Effect of the Community Eligibility Provision on Academic Outcomes (with John Gordanier, Breyon Williams and Crystal Zhan) *Economics of Education Review* Volume 77, August 2020, 101999

Before the Lunch Line: Behavioral Economic Interventions for Pre-Commitment (with Melayne McInnes, Christine Blake, Gabrielle Turner-McGrievy, Edward Frongillo) *Journal of Economic Behavior and Organization* Vol 176, August 2020, Pages 597-618

Hunger Pains? SNAP Timing, and Emergency Room Visits (with John Gordanier and Chad Cotti) *Journal of Health Economics*, 2020, Vol 71 Issue.1 pp.

Occupational Match Quality and Gender over Two Cohorts (with John Addison and Liwen Chen) *Industrial and Labor Relations Review* 2020 Vol 73 Issue: 3, pp.730-767

Changes in Globalization: How Should IB Educators Respond? (with Nancy Buchan and Elizabeth Ravlin) *AIB Insights*, 2020 Vol.20 Issue.1 pp15-23

16. The Impact of Information Technology and Communication on Medical Malpractice Lawsuits (with Luv Sharma and Carrie Queenan) *Production and Operations Management* Volume 28, Issue 10, October 2019, pp 2552-2572

Task Followers and Labor Market Outcomes (with John Gordanier and Liwen Chen) *Journal of Labor Research* June 2019, Volume 40, Issue 2, pp 181–201

When Does It Count? The Timing of Food Stamp Receipt and Educational Performance in Mathematics (with John Gordanier and Chad Cotti) *Economics of Education Review* Volume 66, October 2018, Pages 40-50.

Class Meeting Frequency, Start Times, and Academic Performance (with John Gordanier and Chad Cotti) *Economics of Education Review* Volume 62, February 2018, Pages 12-15

The Occupational Feminization of Wages (with John Addison and Si Wang) *Industrial and Labor Relations Review* Volume 71, Issue 1, January 2018, pp. 208-241

Does the Timing of Food Stamp Distribution Matter? A Panel-Data Analysis of Monthly Purchasing Patterns of US Households (with John Gordanier, Chad Cotti and Elena Castellari) *Health Economics* Volume 26, Issue 11 November 2017 Pages 1380–1393

Eat (and Drink) Better Tonight: Food Stamp Benefit Timing and Drunk Driving Fatalities (with John Gordanier and Chad Cotti; *American Journal of Health Economics* Fall 2016, Vol. 2, No. 4, Pages 511-534)

Development of a Structured Observational Method for the Systematic Assessment of School Food Choice Architecture (with Melayne McInnes, Christine Blake, Edward Frongillo, and Sonya Jones) *Ecology of Food and Nutrition* Vol.55 No.2 pp 119-140. 2016

Improved Targeting of Social Programs: An Application to a State Job Coaching Program for Adults with Intellectual Disabilities (with Melayne McInnes and Suzanne McDermott and Joshua Mann) *Eastern Economic Journal*. Vol.42, p.p.252-269. March 2016

The Role of Gender and Sector in Promotion and Pay over a Career (with John T. Addison and Si Wang) *Journal of Human Capital*, Vol. 8, No. 3, pp 280-317 Fall 2014

Welfare Reform and Children's Short Run Attainments-A Structural Approach (with Hau Chyi and Weilong Zhang) *Contemporary Economic Policy*, Volume 32, Issue 4, pages 729–751, October 2014

Job Promotion in Mid-Career: Gender, Recession and 'Crowding' (with John Addison and Si Wang) *Monthly Labor Review*, January 2014

The Effects of Single Mothers' Welfare Use and Employment Decisions on Children's Cognitive Development, (with Hau Chyi) *Economic Inquiry*, Vol.51, Iss.1, pp. 675-706, 2013

Minimum Wages, Labor Market Institutions, and Female Employment and Unemployment: A Cross-Country Analysis, (with John Addison) *Industrial and Labor Relations Review*, Volume 65, Number 4, 2012, pp.779-809

Confessions of an Internet Monopolist: Demand Estimation for a Versioned Information Good, (with Henry W. Chappell, Jr. and Paulo Guimarães), *Managerial and Decision Economics* Volume 32, Issue 1, pp.1-15, January 2011

Does Supported Employment Work? (with Melayne McInnes and Suzanne McDermott and Joshua Mann), *Journal of Policy Analysis and Management* Vol.29 Issue 3 pp.506-525, 2010

PUBLIC HEALTH PUBLICATIONS:

Physical Activity and Disability: An Analysis on How Activity Might Lower Medical Expenditures. (with Suzanne McDermott, Xinling Xu, Margaret Turk). *Journal of Physical Activity & Health*. 2018 Aug 1;15(8):564-571.

Skin Ulcers and Mortality among Adolescents and Young Adults with Spina Bifida in South Carolina during 2000-2010" (with Bo Chai, Suzanne McDermott, Joshua Mann, Julie Royer, James Hardin, Yinding Wang and Lijing Ouyang) *Journal of Child Neurology*, 2016 Mar ;31(3):370-7

Hospitalizations and Emergency Room Visits for Adolescents and Young Adults with Muscular Dystrophy, Living in South Carolina (with John Clarkson, Suzanne McDermott, Joshua Mann, Julie Royers, James Hardin, and Lijing Ouyang) *Muscle and Nerve*, 2015 Nov;52(5):714-21

Development of a Tool to Describe Overall Health, Social Independence and Activity Limitation of Adolescents and Young Adults with Disability (with Chelsea Deroche, Suzanne McDermott, James Hardin, Deborah Salzberg, Joshua Mann, and Julie Royer) *Research in Developmental Disabilities* 2015 V.38, 288-300

Emergency Department Visits and Inpatient Hospitalizations for Adolescents and Young Adults with Fragile X Syndrome (with Suzanne McDermott, Joshua Mann, Julie Royers and James Hardin) *American Journal of Intellectual and Developmental Disabilities* 2015, Vol. 120, No. 3, 230–243

3. Inpatient and Emergency Room Visits for Adolescents and Young Adults with Spina Bifida (with A. Turk, Suzanne McDermott, Margaret M. Holland, James W. Hardin, Judy K. Thibadeau) *American Journal of Physical Medicine & Rehabilitation*. 2015 Vol 7 (5), 499-511

Determinants of Health Care Utilization by Race among Teenagers and Young Adults with Muscular Dystrophy (with Suzanne McDermott, Joshua Mann, Julie Royers, James Hardin and Lijing Quyang) *Medical Care* October 2014; 52 (1) Supplement 3: i-ii, S1-S75 (Lead Author)

Use of State Administrative Data Sources to Study Adolescents and Young Adults with Rare Conditions (with Suzanne McDermott, Joshua Mann, Julie Royers, James Hardin, Lijing Ouyang and Julie Bolen) *Journal of General Internal Medicine* August 2014; 29(3): 732-738

WORKING PAPERS UNDER REVIEW

Out-of-Court and Long-Run Consequences of In-Court Judicial Biases (with Ozkan Eren and Randi Hjalmarsson)

Pro-environmental behavior and economic tradeoffs during the Covid-19 crisis: An experimental cross-country analysis (with Nancy Buchan, Adriana Pinate, Guilia Urso revisions requested at *Nature - Human Behavior*)

WORK IN PROGRESS

Vanishing Babies: Unintended Consequences of Baby-Friendly Hospital Designations on Maternal Behavior and Hospital Choice (with Lindsey Woodworth and Danna Thomas)

Effects of Education on Health (with Krzysztof Karbownik and Ozkan Eren)

Unequal Before the Law? Racial Discrimination in the Courthouse (with Ozkan Eren and Randi Hjalmarsson)

Community Eligibility Provisions and Financial Health of Families (with Krista Ruffini and Melinda Pitts)

RETIRED WORKING PAPERS

Are Recessions Momcessions? Recessions and Occupational Match Quality by Gender and Parenthood. (with John Addison and Liwen Chen)

Role of Gender and Specialty in Physicians Views on Abortion: Evidence from Political Contributions (with Lindsey Woodworth and Olivia Reszczynski)

Risk Tolerance, Gender and Occupational Outcomes (with Melayne McInnes, Foteini Tzachrista, and Si Wang)

Charter School Location Choice: Do They Respond to Demand (with Crystal Yi Zhan)

Neighborhood Crime and Student Outcomes (with Robert Pettis)

Employment Effects of Minimum Wages in Inflexible Markets: Part-time Jobs and Female Labor Force Participation in Turkey

Black Hospital Closures and Racial Disparities in Hospital Access (with Lindsey Woodworth and Owen Thompson)

Mental Health and COVID-19: A Two-Country Comparison of Gender Roles, Economic Crises and Career and Health Concerns (with Nancy Buchan, Adriana Pinate, Guilia Urso)

FUNDED GRANTS / PROJECTS

Evaluation of the South Carolina Direct Representation Program for Children in Foster Care (\$587,398) Co-PI with Liyun Zheng, Katherine Perkins and Yanfeng Xu.

Evaluation of the Economic and Social Costs of Expiring Subsidies for Marketplace Health Insurance Plans in South Carolina (IMPH, 33000)

Economic/Fiscal Impact Study for New Morning's No Drama Program (New Morning Foundation, 35000)

Return on Investment Analysis for programs increasing Child Care Access and Child Care Workforce Stability (SC DSS, 35000)

Juvenile Incarceration, Long-Run Outcomes, and Family Spillovers (\$244,721) with Ozkan Eren & Randi Hjalmarsson Arnold Ventures

State of ASD and NDD in South Carolina: Assessing the Impact of Early Detection of ASD and NDD in South Carolina Using Linked Administrative Data (\$40,000) Can Excellence Initiative 2024 Research Pilot Grant with Sarah Edmunds.

Funding for A Workshop to Mentor Female and Non-binary Graduate Students in Economics, Alfred Sloan Foundation (\$50,000) with Melanie Guldi and Catherine McLean

Improving Social, Emotional, Behavioral, and Academic Functioning of Elementary School Students through the Interconnected Systems Framework, Co-PI, Institute of Education Sciences, (subcontract to ECU grant of \$3,799,665)

The Cornell Center for Behavioral Economics in Child Nutrition Programs Small Grant for “Before the Lunch Line: Behavioral Economic Interventions for Pre-Commitment and Teacher Modeling” \$20,000) Co-I, with Melayne McInnes, Cristine Blake, Edward Frongillo, Gabrielle Turner-McGrievy

DHHS CDC Grant for “South Carolina Study of Persons with Rare Disorders” CO-I, with Suzanne McDermott, Joshua Mann, and James Harden, \$1,174,698

USDA-ERS FANRP Grant, Co-I, with Melayne McInnes, Edward Frongillo, Sonya Jones, Cristine Blake, “Children's Food Choices: Understanding Defaults” \$24,996

SC Developmental Disabilities Council, State Grant Program, Co-PI with Melayne Morgan McInnes “Maximizing the Effectiveness of Supported Employment for Individuals with Intellectual Disabilities”, \$12,367

Moore School Internal Research Grants:

Fall 2024 “Juvenile Incarceration, Long-Run Outcomes, and Family Spillovers”, Riegel and Emory Human Resource Center, \$5000

Fall 2020 “Spillover Effects of Exit Exams, Academic Outcomes, and Crime”, \$4500

Fall 2020 “Mental health and Covid-19: A three-country comparison of gender roles, economic crises and career and health concerns”, \$5000 Co-PI with Nancy Buchan, Foteini Tzachrista and Mohammad Jakaria

Fall 2020 “Preventing suicide in southwest region of Bangladesh: A randomized field experiment” \$5000 Co-PI with Roberto Gonzalez, Foteini Tzachrista and Mohammad Jakaria

Fall 2019 “Hospital Desegregation and Racial Disparities in Birth Outcomes”, \$5000 CO-PI with Lindsey Woodworth

Fall 2019 “Form the Norm, Nudging Students to Seek Counseling”, \$995 CO-PI with Foteini Tzachrista

Fall 2018 “Predictors and Outcomes of Juvenile Delinquency” \$4,500

Fall 2017 “SNAP Benefit Timing on Emergency Department Utilization” \$1,950 Co-PI with John Gordanier

Spring 2017 “An Inquiry into the Effects of Police Related Deaths on Trust”, \$5,000 Co-PI with Matthew Harvey (\$8,500 total)

2008-2014: “Kids’ Food Choices (\$2,520); Evaluating Supported Employment Programs in SC (\$1000); Does Anyone “Gain” from Food Stamps Program? Obesity and Food Stamps (\$1,000); Good Jobs, Bad Jobs and Welfare Independence (\$1,500); Charitable Giving, Volunteering and Retirement (\$1,000)

SERVICE

Ad Hoc Referee service:

Journal of Public Economics
Contemporary Economic Policy
PLOS One

Journal of Human Resources
Review of Economics of the Household
Industrial and Labor Relations Review

Journal of Labor Economics
Empirical Economics
Agricultural and Resource Economics Review
Journal of Population Economics
Economic Inquiry
Journal of Labor Research
Economics and Human Biology
Labour
Portuguese Economic Review
Review of Income and Wealth
Southern Economic Journal
Eastern Economic Journal
Economic Modeling
Economic Development Quarterly
Labour Economics

Disability and Health Journal
Journal of Economic Behavior and Organization
European Journal of Health Economics
International Journal of Tax and Public Finance
Social Science Review
Journal of Economic Psychology
Nutrition
American Educational Research Journal
Journal of Policy Analysis and Management
Health Economics
Economics of Education Review
Food Policy
Social Science Quarterly

Ad Hoc Grant Proposal Reviewer

Israel Science Foundation
Swiss National Science Foundation
San Diego State University Center for Health Economics & Policy Studies Grant Program
US Department of Education, Institute of Education Sciences

PhD Advising:

PhD Thesis Advisor for Foteini Tzachrista (2019-2022) (University of Illinois-Chicago)
Zehra Valencia (2019-2021, co-advisor with Jason DeBacker) (Health Care Cost Institute)
Breyon Williams (co-advisor with Daniel Jones) (2016-2019) (Analysis Group - Boston)
Liwen Chen (2014-2018) (Assistant Professor at East China Normal University of Shanghai)

Dissertation Committee Member for Yunus Demirci (Economics, current), Roxana Martinez-Gonzales (Economics, current), Ashley Rojas (Economics, current), Mohammad Jakaria (Economics, current), Bhavna Phogaat (Marketing, current), Sarah Akyena (Economics, Public Policy, Georgia State University) Saharnaz Babaei (Economics, current), Mahyar Ebrahimiturki (Economics, current), Kaleigh Strollh (Economics, current), Mohammad Jakaria (Economics, current), Angela Shoulders (Economics, current), Arkapravo Sarkar (Marketing, 2021), Zhongyu Cao (2018-2019), Robert Pettis (2016-2019); Songyung Deng (Health Service Policy and Management 2018-2019); Xi Cheng (Health Service Policy and Management 2018-2019); Xinling Xu (Biostatistics 2016-2017); Anudeep Gill (2014-2016); Minseok Park (Management Science 2014-2018); Marianna Nicolae (Management Science 2012-2013); Si Wang (2009-2013); Dan Qu (2007-2010); Sheila Murthy (2007-2009); Erica Morgan (2007-2009); Joey Von Nessen (2007-2009); Jonathan Munn (2007-2009)

Comprehensive Exam Committee Member:

Arkapravo Sarkar (Marketing, 2021); Amir Javadinia (Marketing 2016)

Masters Advising:

Master Thesis Advisor for Morgan Holland (2014); David Bergmann (2012); Robert Jonathan Pierce (2010- 2012)

Master Thesis Reader for Seth Hershberger (2022); Melissa Gentry (2018); Mathew Milnichuk (2009-2010); Kevin Fellner (2009-2010)

Undergraduate Advising:

Honors Thesis Advisor for Sophia Kiser (2025); Antonia Adams (2022-2023); Aaron Schickler (2022-2023); Stephen Zahran (2021-2022); Sara Hamilton (2020-2021); Emily Martin (2020-2021); Marie Morales (2019-2020); Lacey Wilson (2017-2018); Marshall Bradley (2016-2017); Dimitri Adriano (2016-2017); Kevin Anneken (2016-2017); Kendall Austin (2007-2009)

Honors Thesis Reader for Liza Semona (current); Sam Maloney (2025); Laurel Davis (2023); Marianna Smith (2019); Jamie Gilberto (2017); Jonathan Tredge (2018); Andrew Kowtun (2016)

Magellan Scholar Mentor for Sam Maloney (2024); Sara Hamilton (2020-2021); Lacey Wilson (2017-2018); Dimitri Adriano (2017); Julio Diaz (2012); Peter Schaeffing (2011); Marshall Bradley (Magellan Apprentice-2017);

Honors College Research Funding with Emma Britt (2023-2024); Lyndsay Dalton (2023-2024)

Other Service to the Department, College, University and the Profession

APPAM 2026 Fall Research Conference Education Program Committee

APPAM 2026 Fall Research Conference Health Program Committee

SC Maternal and Infant Health Task Force, Member, 2024-2025

SC Labor Force Participation Task Force, Member, 2022-2023

Faculty Senate Committee on Admissions 2022-current (chair elect – starting Fall 2024)

Dean Review Committee, 2020

Darla Moore School of Business PhD Program Faculty Committee (2015-2022) (Chair: 2018-2021)

Faculty Senate Information Technology Committee 2019-2021

Technology and Assessment QEP Subcommittee 2019-2022

COACH Survey Communication Planning Committee, 2019-2022

CSWEP Board Member Southern Representative, 2023-current

CSWEP Mentoring Workshop for Female and Non-Binary PhD Students Co-Organizer–2022 - current

ASHEcon Mentor 2022

Panel on Job Market and Academic Jobs for U of SC Presidential Fellows - 2019

CSWEP Mentorship Panel – SEA Conference 2019

Provosts Advisory Committee on Women's Issues (PACWI) USC (2016-2019) (Sub-Committees: Diversity in Leadership (co-chair 2018-2019) Mentoring and Professional Development (co-chair 2017-2018); New and Existing Policies)

Panel Member, Artificial Intelligence: Game Changer or Game Over? Oct 2022

Maxcy House Faculty Fellow, 2018-2021.

Darla Moore School of Business Moore School Assessment of Teaching Effectiveness & Student Learning Committee (2015-2018)

Organizer, Economics Brownbag and Seminar Series, University of South Carolina (Fall 2012 to Fall 2014 and Fall 2007 to Spring 2009)

Moore School Student Academic Grievance Committee (2009-2012)

Economics Department Chair (2022-current)

Economics Department PhD Coordinator (2015-2022)

Economics Department Search Committee (2014-2016 2018-2019 2022-2023 2023-2024 2025-2026)

Economics Department Assessment Committee (2013-2014)

Economics Department Undergraduate Teaching and Curriculum Committee (2009-2012)

Panel Member – Job Market Advice to Graduate Students, 2009

Darla Moore School of Business Rising Scholars Program Mentor (2018-2019)

Mentor, USC Women's Mentor Network, 2011

University of South Carolina Turkish Students Association Faculty Advisor 2010-2016

Contributor, Organizing committee for Turkish Colloquium Speaker Series, Walker Institute, 2007
Reviewer for SPARC Graduate Fellowship, 2013
Reviewer for Magellan Scholars Program, 2013
Darla Moore School of Business Rising Scholars Program Mentor Reviewer, 2019, 2020, 2021
Reviewer for Discovery Day, 2021

Southern Economic Association Presidential Session Organizer (2017-Current)
CSWEP (Committee on the Status of Women in the Economics Profession) Board Member 2023-current
CSWEP (Committee on the Status of Women in the Economics Profession) Liaison for USC Economics Department 2017-current

CSWEP Professional Development Panel: Advice for Job Seekers and Early Career, Panel Presenter, SEA Conference 2016

CSWEP Mentorship Lunch, Mentor, SEA Conference 2016

CSWEP Professional Development Panel: Advice for Job Seekers and Early Career, Panel Presenter, SEA Conference 2019

CSWEP Mentorship Lunch, Mentor, SEA Conference 2019

Southeastern Micro Labor Conference, 2020, Host

Southeastern Applied Micro Labor Conference Steering Committee Member (2019 -current)

Electronic Health Economics Colloquium (EHEC) Organizing Committee (2023-2024)
Electronic Health Economics Colloquium (EHEC) Organizing Committee (2020-2021)

Program Committee Member, 4th International Conference on Higher Education Advances (HEAd'18) Conference

Review Panel Member for US Department of Education Institute of Education Sciences, 2021-current

Budget report for The South Carolina Department of Social Services, 2009-2010

TEACHING

PhD Teaching:

Econometrics II, Spring 2008, Fall 2011, Spring 2013, Spring 2015, Spring 2017, Spring 2019, Spring 2021, Spring 2023

Labor Economics, Spring 2009, Spring 2014, and Spring 2017

Applied Econometrics, Spring 2007

Undergraduate Teaching:

Intermediate Microeconomics, 2010, Fall 2011, Spring 2012, Fall 2012, Spring 2013, Fall 2013, Spring 2014, Fall 2014, Spring 2015, Fall 2015, Spring 2016, Fall 2016, Spring 2017, Spring 2019, Fall 2019, Fall 2020, Fall 2021

Honors Principles of Economics, Fall 2007, Fall 2008, Fall 2009

Principles of Microeconomics, Fall 2006, Spring 2008, Spring 2010, Fall 2010

CONFERENCE AND SEMINAR PRESENTATIONS

Arnold School of Public Health, USC, March 2026

Southern Economic Association Conference, November 2025

Transatlantic Workshop on the Economics of Crime, Sept 2025

NBER Children and Families Program Spring Meeting, April 2025

Southeastern School Mental Health Conference, April 2025

Texas Crime Conference, April 2025

Georgia State University, Andrew Young School of Public Policy, March 2025
 Southern Economic Association Conference, November 2024
 Auburn University, March 2024
 University of Central Florida, Jan 2023
 APPAM Fall Conference, November 2023
 Clemson University, Workshop on Education and Education Outcomes, Nov 2023
 University of Minnesota, Oct 2023
 3rd Annual SEEDS Conference, April 2023
 Southeastern Applied Micro Labor Conference, April 2023
 Southern Economic Association Meetings (x2), November 2022
 Vanderbilt University, October 2022
 University of Central Florida, October 2022
 Society of Labor Economists Annual Meeting, Minneapolis, 2022
 Southern Economic Association Meetings, November 2021
 Florida Applied Micro Virtual Seminar Series, August 26th, 2021
 American Society of Health Economists Annual Conference, June 2021
 Western Economics Association Meetings, June 2021
 International Association for Feminist Economics, schedule June 2021
 Carolina Regional Empirical Economics Day, May 2021
 University of Missouri, April 2021
 Southern Economic Association Conference, (x5 papers) Nov 2020
 APPAM Fall Research Conference, Nov 2020
 Clemson University, Oct 2020
 Claremont Graduate University, Computational Justice Lab, Oct 2020
 American Society of Health Economists Conference 2020 (Cancelled due to COVID-19)
 University of California, Riverside, Feb 2020
 SDSU Center for Health Economics and Policy Studies, Feb 2020
 Southern Economic Association Conference, Fort Lauderdale, 2019 (x2)
 International Health Economics Association Conference, Basel Switzerland July, 2019
 American Society of Health Economics Conference(x2), Washington DC, June 2019
 Micro Labor Conference, Federal Reserve Bank of Atlanta, April 2019
 Allied Social Sciences Association Conference, Atlanta., Jan 2019
 University of Mississippi, April 2019
 Southern Economics Association Conference(x2), Nov 2018
 American Society of Health Economists Conference, June 2018 (x3)
 Midwest Economic Association Conference, March 2018
 Federal Reserve Bank of Atlanta, Dec 2017
 Syracuse University, Maxwell School, Center for Policy Research, Oct 2017
 Bureau of Labor Statistics, Washington-DC, Sept 2017
 University of Central Florida, Orlando, FL, September 2016
 Southern Economics Association Meeting (2007, 2008, 2009, 2010, 2011, 2013, 2014, 2016, 2017)
 Midwest Economics Association Meeting (2005,2009, 2016)
 Eastern Economics Association Meeting (2009, 2016)
 Health Disparities Research at the Intersection of Race, Ethnicity, and Disability: A National Conference, Washington DC, April 2013
 Conference in Honor of John Kennan, Madison, WI, May 2012
 NAREA Pre-Conference Workshop on Economics and Child Nutrition, Pittsburg, July 2011
 Society of Labor Economist Annual Meeting (2008, 2011)
 Western Economic Association Meeting (2010)
 Amherst College, Five Colleges Economics Workshop, May 2010
 Clemson University, Economics Workshop, March 2010
 University of Kentucky, Lexington, KY, April 2009
 Federal Reserve Bank of Cleveland, Cleveland, OH, March 2009
 University of St Thomas, St Paul, MN, January 2009
 American Society of Health Economists (joint with IHEA) Conference, Durham, NC, June 2008
 European Society of Population Economists Annual Meeting, Chicago, June 2007
 ZEW-Center for European Economic Research, Institutions and Labor Markets Workshop, 2007

University of Southern Florida, Economics Workshop, 2007
Concordia University, Montreal, Canada, Economics Workshop 2006
University of South Carolina, Economics Brownbag, 2006
Kansas State University, Economics Workshop, 2006
Lake Forest College, Chicago, Economics Workshop, 2006
UW-Department of Economics, Labor Economics Workshop, November 2004
UW-Department of Economics, Labor Economics Workshop, November 2003
Central Bank of Republic of Turkey, Economic Research Department Workshop, September 2003
METU-ERC International Conference in Economics, Ankara-Turkey, September 2003

MARK OWENS

mowens6@citadel.edu

ACADEMIC POSITIONS

The Citadel	Associate Professor	2026 - present
	Assistant Professor	2023 - 2026
UT Tyler	Associate Professor & Dir., Center for Opinion Research	2020 - 2023
	Assistant Professor	2015 - 2020
Bates College	Visiting Assistant Professor	2014 - 2015

ACADEMIC AFFILIATIONS

WCIV, ABC 4 (Charleston)	Political Analyst	2026 - present
Charleston School of Law	Adjunct Professor of Law	2024 - present
<i>Office of the President Pro Tempore, U.S. Senate</i>	APSA Congressional Fellow	2015 - 2016

EDUCATION

University of Georgia	Ph.D. in Political Science	2014
University of Oxford	Visiting Doctoral Student in the Department of Politics	2013
Johns Hopkins University	M.A. in Government	2008
University of Florida	B.A. in Political Science, <i>magna cum laude</i>	2006

BOOKS

Owens, Mark and Ken Wink. N.d. *Talking Past Each Other: Texas Political Geography and Political Messaging in an Era of Republican Dominance*. DeGruyter. *Under Contract*.

Kapeluck, Branwell DuBose and Mark Owens. 2026. *The 2024 Presidential Election in the South: Déjà Vu All Over Again*. Bloomsbury Publishing.

Owens, Mark, Ken Wink, and Kenneth Bryant, Jr. 2022. *Battle for the Heart of Texas: Political Change in the Electorate*. Norman, OK: University of Oklahoma Press.

Bryant, Jr., Kenneth, Eric Lopez, and Mark Owens. 2020. *Game of Politics: Conflict, Power, & Representation*. Tyler, TX: The University of Texas at Tyler Press (Open Source Textbook).

ARTICLES

- 19 Ferguson, Grant, James Gimpel, Mark Owens, and Daron Shaw. 2026. "Who's That Knocking? A Study of the Strategic Choices Facing Large-Scale Grassroots Canvassing Efforts." *Political Science Quarterly* 141(2): 233-255.
- 18 Howard, Nicholas and Mark Owens. 2025. "A Reshaped Ladder? Southern States and US Representatives' progressive ambition." *Journal of Political Science* 53(1): 93-117.
- 17 Tiruneh, Yordanos M., Jihye Choi, Paula M. Cuccaro, Journey Martinez, Jing Xie, Mark Owens, and Jose-Miguel Yamal. 2025. "Sociodemographic and health-related predictors of COVID-19 booster uptake among fully vaccinated adults." *Vaccine* 54(30): 127048.

- 16 Carson, Jamie, Anthony Madonna, Mark Owens, Joel Sievert, and Ryan Williamson. 2025. "Building a Record: Amending Activity, Position taking, and the Seventeenth Amendment." *Journal of Political Institutions & Political Economy* 6(1): 85-104.
- 15 Ferguson, Grant, James Gimpel, Mark Owens, and Daron Shaw. 2024. "Understanding the Effect of Abortion Attitudes on Elections after *Dobbs*: Evidence from Cross-Sectional and Panel Surveys in Texas." *Social Science Quarterly* 105(7): 2252-2268
- 14 Ferguson, Grant, James Gimpel, Mark Owens, and Daron Shaw. 2024. "The Surge of the Small Donorate in U.S. Elections: A View from Texas Statewide Campaigns." *Political Geography* 114: 103191.
- 13 Ferguson, Grant, James Gimpel, Mark Owens, and Daron Shaw. 2024. "Campaign Ads and the Differences Between Soliciting Donations and Mobilizing Volunteers." *Journal of Information Technology & Politics* 22(2): 259-277.
- 12 Tiruneh, Yordanos M., Paula M. Cuccaro, Kimberly S. Elliott, Jing Xie, Journey Martinez, Mark Owens, Christian Alvarado, and Jose-Miguel Yamal. 2024. "Vaccine Uptake and Hesitancy: Insights from a Texas Survey on Factors Influencing COVID-19 Vaccination Decisions." *Vaccines* 12(6): 601.
- 11 Cuccaro, Paula M., Jihye Choi, Yordanos M. Tiruneh, Journey Martinez, Jing Xie, Michelle Crum, Mark Owens, and Jose-Miguel Yamal. 2024. "Parental factors associated with COVID-19 vaccine uptake for children over 5 years of age in Texas." *Vaccines*. 12(5): 526
- 10 Howard, Nicholas O. and Mark Owens. 2022. "Organizing Staff in the U.S. Senate: The Priority of Individualism in Resource Allocation." *Congress & the Presidency* 49(1): 60-83.
- 9 Johnson, Renee M., Cassandra Crifasi, Erin M. Anderson Goodell, Arkadiusz Wiśniowski, Joseph W. Sakshaug, Johannes Thrul, and Mark Owens. 2021. "Differences in beliefs about COVID-19 by gun ownership: A cross-sectional survey of Texas adults." *BMJ Open* 11(11): 1-7.
- 8 Goldmann, Emily, Daniel Hagen, Estelle El Khoury, Mark Owens, Supriya Misra, and Johannes Thrul. 2021. "An examination of racial/ethnic differences in mental health during COVID-19 pandemic in the U.S. South." *Journal of Affective Disorders* 295(1): 471-478.
- 7 Owens, Mark. 2021. "Changes in Attitudes, Nothing Remains Quite the Same: Absentee Voting and Public Health." *Social Science Quarterly* 102(4): 1349-1360.
- 6 Johnson, Renee M. and Mark Owens 2020. "Emergency Response, Public Behavior, and the Effectiveness of Texas Counties in a Pandemic." *Journal of Political Institutions & Political Economy* 1(4): 615-630.
- 5 Howard, Nicholas O. and Mark Owens. 2020. "Circumventing Legislative Committees: Use of Rule XIV in the U.S. Senate." *Legislative Studies Quarterly* 45(3): 495-526.
- 4 Madonna, Anthony J., Michael Lynch, Mark Owens and Ryan Williamson. 2018. "The Vice President in the U.S. Senate: Examining the Consequences of Institutional Design." *Congress & The Presidency* 45(2): 145-165.

- 3 Owens, Mark. 2018. "Changing Senate Norms: Judicial Confirmations in a Nuclear Age." *PS: Political Science and Politics* 51(1): 119-123.
- 2 Carson, Jamie L., Anthony J. Madonna, and Mark Owens 2016. "Regulating the Floor: Tabling Motions in the U.S. Senate, 1865-1946." *American Politics Research* 44(1): 56-80.
- 1 Carson, Jamie L., Anthony J. Madonna, and Mark Owens 2013. "Partisan Efficiency in an Open-Rule Setting: The Amending Process in the U.S. Senate, 1865-1945." *Congress & The Presidency* 40(2): 105-128.

BOOK CHAPTERS

- 6 Owens, Mark and Jordan Ragusa. 2027. "How to Teach: Congress." In *Elgar Encyclopedia of Teaching and Pedagogy in Political Science*, eds Julia Hellwege, Dan Mallinson, and Joseph W. Roberts. Cheltenham, UK: Edward Elgar Publishing.
- 5 Owens, Mark. 2026. "Texas: Reinventing the party brands." In *The 2024 Presidential Election in the South: Déjà Vu All Over Again*, eds DuBose Kapeluck and Mark Owens. Bloomsbury Press.
- 4 Buchanan, Scott and Mark Owens. 2025. "South Carolina: Republican Refuge in a Growing South." In *New Politics of the Old South*, Eighth Edition, eds Charles Bullock, III and Mark Rozell. Bloomsbury Press.
- 3 Howard, Nicholas O. and Mark Owens. 2024. "Developing a Bench: President Obama's Judicial Appointment Legacy." In Meena Bose and Paul Fritz, eds. *Evaluating the Obama Presidency: From Transformational Goals to Governing Realities*. Berlin: De Gruyter.
- 2 McWhorter, Rochell, Mark Owens, Jessie Rueter, Joanna Neel, and Gina Doecker. 2020. "Examining Adult Learning of 'Giving Back' Initiatives." In *Handbook of Research on Adult Learning in Higher Education*. Hershey, PA: IGI Publishers.
Reprinted in 2021 by Information Resources Management Association (Ed.), in *Research Anthology on Adult Education and the Development of Lifelong Learners* (pp. 1039-1066). IGI Global.
- 1 Carson, Jamie L. and Mark Owens. 2015. "Lawmaking." In Robert A. Scott and Stephen M. Kosslyn, eds. *Emerging Trends in the Social and Behavioral Sciences*. New York: Wiley.

BOOK REVIEWS

- Owens, Mark. 2025. "Craig, Alison. *The Collaborative Congress: Reaching Common Ground in a Polarized House*." *Congress & the Presidency* 52(3): 340-341.
- Owens, Mark. 2024. "Miller, Donna Marie. *Texas Secessionists Standoff: The 1997 Republic of Texas 'War'*." *Western Historical Quarterly* 55(1): 75-76.
- Owens, Mark. 2023. "Johnson, Marc. *Tuesday Night Massacre: Four Senate Elections and the Radicalization of the Republican Party*." *Great Plains Research* 33(1): 62.
- Owens, Mark. 2021. "Lewallen, Johnathan. *Committees and the Decline of Lawmaking in Congress*." *Congress & the Presidency* 48(3): 404-406.

SELECT GRANT & CONTRACT DESCRIPTIONS

CAREER SUPPORT AS A PI (2011 - 2026). 15 AWARDS AND \$1.5 MILLION

Climate adaptation by the public in South Carolina, (PI). 2026. Scope of Survey: South Carolina residents, with oversamples of coastal communities. Funded by: Climatological Research Grant, Lt. Col. James Near Climate Center.	\$12,000
Collaboration in Congress: All Mark-up Amendments in Congress, 1995 - 2024, (PI). 2025. Scope of Work: Content Analysis of House Committee reports, 1995 - 2024 Funded by: Faculty Summer Provost Research Grant, The Citadel.	\$12,500
Shaping Representation: New Approaches to Redistricting in the South, (PI). 2024. Scope of Survey: National sample of 20,000 respondents. Funded by: Faculty Summer Provost Research Grant, The Citadel.	\$12,500
Survey Research Experiences for Students, (Co-PI). 2024 - 2026. Scope of Work: Apply survey research across the Master of Social Sciences curriculum. Funded by: Lowcountry Graduate Center, Charleston, SC.	\$25,000
Texas Vaccine Hesitancy Survey, (Co-Investigator & PI for Subaward). 2022. PI of \$1.3 million subaward: Mark Owens. Scope of Survey: Statewide survey of hard to reach respondents (Apr. to Nov.). Funded by: Texas State Department of Health and Human Service.	\$2.6 million

COMMENTARY

- 6 Kapeluck, DuBose and Mark Owens. "These two big factors will play a key role in Saturday's SC primary." *The Post & Courier*. Thursday February 23, 2024. Page, A9.
- 5 Owens, Mark. "Why our poll got it wrong on Biden but right on so much more." *Dallas Morning News*. Sunday November 15, 2020. Page, 5.
- 4 Howard, Nicholas O. and Mark Owens. "Are Amendment Strategies Learned Through Experience or Contingent on the Institution?" *LegBranch*. May 27, 2019.
- 3 Bryant, Jr. Kenneth, Ken Wink, and Mark Owens. "Conflicting Attitudes of Texans on Wall and Border Policies." *Austin American-Statesman*. March 11, 2019.
- 2 Owens, Mark. "Are Courtesy Meetings Nuked?" *LegBranch*. July 10, 2018.
- 1 Owens, Mark. "East Texans support Trump, but at lower levels than 2012." *Tribtalk: Texas Tribune*. November 8, 2016.

EXTERNAL SERVICE

Expert Witness for State of Florida, <i>Common Cause et al. v. Byrd</i> , procedural & voting analysis.	2023
Expert Witness for Galveston County, <i>Petteway et al v. Galveston County</i> , compactness analysis.	2023
Expert Witness for Galveston County, <i>U.S. v. Galveston County</i> , historical voting analysis.	2023
Expert Witness for neither party, <i>Palmer et al. v. Hobbs</i> , racially polarized voting analysis.	2023
Expert Witness for State of Florida, <i>BVM v. Lee</i> , racially polarized voting analysis.	2022
Map Consultant for People not Politicians OK, Independent U.S. House and state district plans.	2021

EDITORIAL SERVICE

Guest Editor, <i>American Review of Politics</i> Special Issue on Southern Politics.	2027
Book Reviews Editor. <i>Public Opinion Quarterly</i> .	2023 - present
Editorial Board Member. <i>American Review of Politics</i> .	2026 - present
Editorial Board Member. <i>Journal of Political Science</i> .	2025 - present
Co-Editor. <i>Presidency & Executive Politics Report</i> , APSA PEP Section.	2018 - 2019

COURSES TAUGHT

Undergraduate: Political Geography | Public Opinion | Research Methods | Southern Politics
Civil Rights Movements | Campaigns & Elections | Election Administration | Legislative Politics

Law: Climate Law | Election Law | Legislation | U.S. Civil Rights

MA: American Politics | Congress & Legislation | Texas Politics | Research Methods

MPA: Advanced Quantitative Research | Budgeting & Public Finance | Program Evaluation

INVITED TALKS (SELECTED)

Rotary Club of West Ashley	“Electoral impact of migration to S.C.”	2026
Exchange Club of Charleston	“A Full Ballot in the 2026 Elections”	2026
Monday Luncheon Group (Columbia, SC)	“Issue Attitudes in the South”	2025
Exchange Club of Charleston	“Your votes in the 2024 Election”	2024
Dallas Democratic Forum	“Battle for the Heart of Texas”	2022
Southern Methodist University, Tower Center	“Battle for the Heart of Texas”	2022
League of Women Voters, Houston	“Battle for the Heart of Texas”	2022
Texas A&M San Antonio	“Public Attitudes on Equity and Inclusivity”	2022
Delta Sigma Theta Sorority, Tyler Alumnae	“Social Action & Election Education”	2022
Texas Associated Press Managing Editors	“Texas Politics Panel”	2021
League of Women Voters, Oklahoma	“All about Redistricting”	2021
Smith County Republican Women Club	“Understanding the 2020 Election Polls”	2020
League of Women Voters, Tyler/Smith County	“Processes of the Electoral College”	2020
Bates College, Martin Luther King, Jr Day	“Legacy of the Voting Rights Act of 1965”	2015
Rothemere American Institute, Oxford, UK	“Effect of Bicameralism on Policy”	2013

CONFERENCE PRESENTATIONS

The Citadel Symposium on Southern Politics	2014 - 2026
American Association of Public Opinion Research Meeting	2020 - 2026
Hofstra University Presidential Conference on Barack Obama’s Presidency	2023
Election Science, Reform, and Administration Conference	2020, 2025
Congress & History Conference	2012, 2016, 2018
American Political Science Association Meeting	2011 - 2016, 2020
Midwest Political Science Association Meeting	2011 - 2018, 2023 - 2026
South Carolina Political Science Association Meeting	2024 - 2026
Southern Political Science Association Meeting	2011 - 2014, 2017 - 2023

AWARDS

Burns “Bud” Roper Fellow. American Association of Public Opinion Researchers.	2021
Prestige Impact Award, Dean of the College of Arts & Sciences at UT Tyler.	2019
Outstanding Faculty Mentor Award, UT Tyler Office of the Provost.	2019
Teaching and Learning Award, UT Tyler Center for Excellence in Teaching and Learning.	2018
Community Engaged Learning Award, Harvard Center at Bates College.	2015
Charles S. Bullock, III Scholar, UGA School of Public and International Affairs.	2009

PROFESSIONAL SERVICE

Panel Reviewer. National Science Foundation’s Social, Behavioral, and Economic Sciences Division.	2025
Co-Chair. Election Sciences Conference within a Conference at SPSA, San Antonio, TX.	2022
Field of Study Advisory Committee. <i>Texas Higher Education Coordinating Board.</i>	2018 - 2021
Grant Reviewer. Hurricane Resilience Research Institute (HURRI), University of Houston.	2018

Print Interviews: New York Times, Los Angeles Times, USA Today, Bloomberg News, Newsweek, Reuters, Texas Monthly, US News & World Report, Post & Courier, SC Daily Gazette, Austin American-Statesman,

Dallas Morning News, Fort Worth Star-Telegram, Houston Chronicle, Texas Tribune, Tyler Morning Telegraph, La Croix International (France), and Het Financieele Dagblad (Netherlands).

TV Interviews: News Nation, Fox LiveNOW, Capital Tonight (Austin), ABC (WCIV-Charleston, KTBS-Shreveport, KLTV-Tyler), CBS (WCSC-Charleston, KEYE-Austin, KYTX-Tyler), Fox (WTAT-Charleston, WGHP-Charlotte, KTBC-Austin, KDFW-Dallas, KFXK-Tyler), NBC (WCBD-Charleston, KXAN-Austin, KXAS-Dallas, KETK-Tyler).

Radio Interviews: CBS Radio, NPR, SC Public Radio, Texas Public Radio, and Red River Radio.

UNIVERSITY SERVICE AT THE CITADEL

Co-Director. The Citadel Symposium on Southern Politics	2023 - present
Committee Member. Faculty Senate Committee on Financial Affairs.	2024 - present
Faculty Representative. Financial Review Board for The Citadel.	2026 - present
Steering Committee Member. Lt. Col. James B. Near Center for Climate Studies	2026 - present
Faculty Advisor. Pi Sigma Alpha Chapter	2024 - 2025

Vita
(September 2026)

DuBose Kapeluck

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Mims 307
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The Citadel
Charleston, SC 29409
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(843) 953-2037

Education:

B.A., 1993, History, College of Charleston, Charleston, South Carolina
M.A., 1997, Political Science, North Carolina State University, Raleigh, North Carolina
Ph.D., 2001, Political Science, Louisiana State University, Baton Rouge, Louisiana.
(Concentrations in Congress, Public Policy, Political Theory, Methods)

Position Held:

Department Chairman, Department of Political Science, The Citadel (Fall 2015 to Spring 2024)
Full Professor of Political Science, The Citadel (Fall 2014 to present)
Associate Professor of Political Science, The Citadel (Fall 2008 to present)
Assistant Professor of Political Science, The Citadel (Fall 2002 to present)
Assistant Professor of Political Science, Georgia Southern University (Fall 2001 to Spring 2002)

Courses Taught:

American Government, European Affairs, Legislative Process, Research Methods (social science statistics), Political Theory, Constitutional Law, Urban Politics, Introduction to Political Science, Public Policy, International Political Economy, Media and Politics

Refereed Publications (in chronological order):

- Kapeluck, Branwell DuBose, and Mark Owens. (2026) *The 2024 Presidential Election in the South: Déjà vu all over again*. Bloomsbury Publishing (eds.).
- Kapeluck, Branwell DuBose, and Scott Buchanan. 2026. "South Carolina: Red Hot" in Branwell DuBose Kapeluck and Mark Owens. Bloomsbury Publishing (eds.). *The 2024 Presidential Election in the South: Déjà vu all over again*.
- Kapeluck, Branwell DuBose, and Scott E. Buchanan. (2021). "South Carolina: Redder than Red for Now" in Scott E. Buchanan and Branwell DuBose Kapeluck. Lexington Books (eds.). *The 2020 Presidential Election in the South*.

- Scott E. Buchanan and Branwell DuBose Kapeluck. (2021) *The 2020 Presidential Election in the South*. Lexington Books (eds.).
- Kapeluck, Branwell DuBose, and Scott E. Buchanan. (2018). "Southern Politics and the 2016 Presidential Election." In Scott E. Buchanan and Branwell DuBose Kapeluck. University of Arkansas Press. (eds.). *The Future Ain't What It Used to Be?: The 2016 Election in the South*.
- Branwell DuBose Kapeluck and Scott E. Buchanan. (2018). *The Future Ain't What It Used to Be?: The 2016 Election in the South*. University of Arkansas Press. (eds.).
- Buchanan, Scott E., and Branwell DuBose Kapeluck (eds.). 2014. *Second Verse, Same as the First: The 2012 Election in the South*. University of Arkansas Press.
- Kapeluck, Branwell DuBose, and Scott E. Buchanan. 2014. "Southern Politics and the 2012 Presidential Election." In Scott E. Buchanan and Branwell DuBose Kapeluck. University of Arkansas Press. (eds.). *Second Verse, Same as the First: The 2012 Election in the South*.
- "Introduction." Buchanan, Scott E. and Branwell DuBose Kapeluck. 2013. In Scott E. Buchanan and Branwell DuBose Kapeluck, eds. special edition of *The American Review of Politics*. Fall and Winter 2013-2014.
- Kapeluck, Branwell. D., Laurence W. Moreland, and Robert P. Steed (eds.). 2010. *The 2008 Presidential Election in the South: Presidential Election Politics in Context*. Lynne Rienner Publishers: Boulder: CO.
- "Issues and Party Coalitions." 2010. In Branwell D. Kapeluck, Laurence W. Moreland, and Robert P. Steed (eds.), *The 2008 Presidential Election in the South: Presidential Election Politics in Context*. Lynne Rienner Publishers: Boulder: CO.
- "Introduction." 2010. In Branwell D. Kapeluck, and Scott Buchanan, eds. special edition of the *American Review of Politics*. Fall and Winter 2010-2011..
- Kapeluck, Branwell. D., Laurence W. Moreland, and Robert P. Steed (eds.). 2009. *A Paler Shade of Red: The 2008 Presidential Election in the South*. 2010. University of Arkansas Press: Fayetteville.
- A review of Hansen, Susan. 2007. *Globalization and the Politics of Pay: Policy Choices in the American States*, Washington, D.C. : Georgetown University Press, in *Journal of Political Science* 2007.
- "Southern Governors and Legislators." 2006. with Robert P. Steed and Laurence W. Moreland., in Laurence W. Moreland and Robert P. Steed (eds.), *Writing Southern Politics: Contemporary Interpretations and Future Directions*. University of Kentucky Press: Lexington.
- "Introduction: The 2004 Citadel Symposium on Southern Politics," with Laurence. W. Moreland and Robert P. Steed. 2004. In Branwell D. Kapeluck, Laurence W. Moreland, and Robert P. Steed, eds., special edition of the *American Review of Politics*, Summer 2004.

"Understanding Surpluses, Deficits, and Debt in the American States, 1950-1998." 2004. with James C. Garand, in Louis Imbeau and Francois Petry (eds.), *Politics, Institutions, and Fiscal Policy: Public Deficits and Surpluses in Federated States*. Lexington Books: Lexington, MA.

Non Refereed Publications:

"Election may prompt historic turnout." 2008. Article published on CharlestonCurrents.com

"These two big factors will play a key role in Saturday's SC primary." 2024. Op-ed published in the *Post & Courier*. February 21.

Conference Presentations:

"The Effect of Revenue Diversification on State Fiscal Health," 2011 Northeastern Political Science Association Conference, Philadelphia, PA, November 17-20.

"The Effect of Redefining Macroeconomic Indicators on Public Opinion: The Case of the Consumer Price Index," 2010 Midwest Political Science Association National Conference, Chicago, Illinois, April 22-25, 2010.

"Issues in Southern Presidential Politics: Putting the 2008 Election in Context," 2010 Southern Political Science Association Conference, Atlanta, Georgia, January 6-9, 2010.

"Explaining Government Size, Trends in the U.S. States from 1946 to 2003," 2007 Northeastern Political Science Association Conference, Philadelphia, Pennsylvania, November 15-17, 2007.

"Divided State Government and Expenditure Allocation Patterns," paper presented at the 2007 South Carolina Political Science Association Conference in Clinton, South Carolina, February 24, 2007.

"Southern Perspectives on Issues in Presidential Politics, 1948 to 2004," paper presented at the 2006 Western Political Science Association Conference in Albuquerque, New Mexico, March 16-18, 2006.

"Divided State Government and Expenditure Allocation Patterns," paper presented at the 2005 Southern Political Science Association Conference in New Orleans, Louisiana, January 6-8, 2005.

"State Government Growth and the Black Population: The Responsiveness of Southern States before and after the Civil Rights Era," paper presented at the Citadel Symposium on Southern Politics in Charleston, South Carolina, March 3-5, 2004.

"The Role of District Population Size on Representational Quality in the United States House of Representatives," paper presented at the Southern Political Science Conference, New Orleans, Louisiana, January 8-10, 2004.

“Divided Government and Growth in the Public Sector”, paper presented at the Southern Political Science Association Conference in Savannah, Georgia, November 6-9, 2002.

“Economic and Political Models of Public Sector Growth in the American States, 1946 to 1997,” paper presented at the Southern Political Science Association Conference in Atlanta, Georgia, November 7-10, 2001.

“Explaining Government Growth in the American States, 1945-1998,” poster session presented at the joint Texas A&M / *State Politics and Policy Quarterly* Conference on Politics in the American States, College Station, Texas, March 2-3, 2001.

“Explaining State Deficits and Surpluses, 1960 to 1998,” coauthored with James Garand, paper presented at the Conference on Public Surpluses and Deficits in Federated States, Montreal, Quebec, Canada, August 2000.

“The Role of House Whips in a Fragmented Party System,” paper presented at the 1999 Annual Meeting of the Southwestern Political Science Association, Galveston, Texas, 1999.

“Why U.S. Senators do *Not* Make Good Presidential Candidates,” poster presentation (with Barry Burden) at the 1999 Midwest Political Science Association Meeting, Chicago, Illinois, 1999.

“PAC Contribution Strategies and Surge and Decline,” paper presented at 1999 Midwest Political Science Association Meeting, Chicago, Illinois, 1999.

“Reexamining Presidential Success and Legislative Productivity,” paper presented at the 1998 Louisiana-Mississippi Political Science Association Meeting, Vicksburg, Mississippi.

Grants and Awards:

2020 Pi Sigma Alpha Grant of \$450.00 for activities related to Beta Iota Chapter

2020 Pi Sigma Alpha Chapter of the Year Award: \$500 award

2019 Pi Sigma Alpha Grant of \$320.00 for activities related to Beta Iota Chapter

2018 Pi Sigma Alpha Grant of \$260.00 for activities related to Beta Iota Chapter

2017 Pi Sigma Alpha Grant of \$260.00 for activities related to Beta Iota Chapter

2016 Pi Sigma Alpha Grant of \$300.00 for activities related to Beta Iota Chapter

2015 Pi Sigma Alpha Grant of \$300.00 for activities related to Beta Iota Chapter

2014 Pi Sigma Alpha Grant of \$300.00 for activities related to Beta Iota Chapter

2013 Pi Sigma Alpha Grant of \$250.00 for activities related to Beta Iota Chapter

2012 Recipient of Fulbright Scholarship to teach at the University of Ljubljana to begin Fall 2012, Grant totaled \$31,681.60 from federal government and €5000.00 from Slovenian government

2012 Recipient of a \$5000 grant for completion of a graduate online course in Research Methods (PSCI/CRMJ 501)

2011 Recipient of Citadel Foundation Presentation Grant to attend the Northeastern Political Science Association Conference in Philadelphia, Pennsylvania

2011 Recipient of semester sabbatical to begin Fall 2012

2010 Citadel Foundation Presentation Grant to attend the Midwest Political Science Association Conference in Chicago, Illinois

2010 Citadel Foundation Presentation Grant to attend the Southern Political Science Association Conference in Atlanta, Georgia

2007 Pi Sigma Alpha Grant of \$400.00 for activities related to Beta Iota Chapter

2007 grant from the Citadel .Foundation of \$533.13 to finance a trip for four members of Pi Sigma Alpha to tour Washington, D.C. and meet with U.S. senators and representatives

2006 Pi Sigma Alpha Grant of \$400.00 for activities related to Beta Iota Chapter

2006 Citadel Foundation Research Grant of \$200.00 for a one-year subscription to Economagic.com—an online data base offering downloadable state and national level economic statistics

2004 Citadel Foundation Research Grant of \$1,170.00 for statistical software (STATA and Stat/Transfer) and state-level data from the U.S. Census Bureau

2007 Citadel Foundation Presentation Grant of \$988.60 to attend the Northeastern Political Science Association Conference in Philadelphia, Pennsylvania

2007 Citadel Foundation Presentation Grant of \$211.07 to attend the South Carolina Political Science Association Conference in Clinton, South Carolina

2006 Citadel Foundation Presentation Grant of \$1068.29 to attend the Western Political Science Association Conference in Albuquerque, New Mexico

2005 Citadel Foundation Presentation Grant of \$1013.11 to attend the Southern Political Science Association Conference in New Orleans, Louisiana

2004 Citadel Foundation Presentation Grant of \$980.00 to attend the Southern Political Science Association Conference in New Orleans, Louisiana

Workshops:

2019 I took 11 students on a Study Abroad Trip to Prague, Czech Republic. This was a trip of my own design.

2018 I took 14 students on a Study Abroad Trip to Prague, Czech Republic. This was a trip of my design.

2017 Political Science professor/advisor for high school professors seeking accreditation as AP Government teachers.

2017 I took 3 cadets on trip organized by the National Council on US-Arab Relations. Met with various government and defense Qataris in Doha, Qatar.

2012 participated in a spring semester course on designing an online course (paid by The Citadel)

2007 *Program on Politics and Economics*, George Mason Law and Economic Center, Arlington, VA, June 1-9, 2007.

Service:

Service to College:

Arranged lecture by Robert Czulda (University of Lodz), then a Fulbright Scholar at the University of Maryland (2019)

Facilitator, 2021 Leadership Day

Facilitator, 2020 Leadership Day

Facilitator, 2019 Leadership Day

Facilitator, 2018 Leadership Day

Facilitator, 2017 Leadership Day

Facilitator, 2016 Leadership Day

Facilitator, 2015 Leadership Day
 Member, Search Committee for BB&T Distinguished Professorship for Ethics & Free Enterprise Leadership (Spring 2014)
 Presentation to Advisory Board for School of Humanities and Social Sciences, Spring, 2014
 Presentation to interested Citadel faculty and students on my Fulbright experience, October 17th, 2013
 Member Research Committee, Fall 2013
 Member Faculty Senate, 2010 – Spring of 2012 to present
 Participated in a Citadel Online Faculty Teaching Academy, Spring 2012
 Spoke to athletic recruits Saturday, January 24th, 2012 about The Citadel academic programs.
 Member, Employment Committee, 2010-2012
 Chair, Curriculum and Instruction Committee, 2005-2006, 2006-2007, and 2007-2008, Member, 2003-2004, 2008-2009
 Member, Core Curriculum Committee, 2003 to 2008
 Conducted an independent study authorized by the Core Curriculum Committee on the effect of adopting the “Satisfactory/Unsatisfactory” policy for grades in English 101
 Cadet Breakfast Ministry at the Cathedral of St. Luke and St. Paul, 2005, 2006, and 2007
 Invited Participation in the Inns of Court Program in fall of 2004 at Camp St. Christopher (Seabrook Island)

Service to Department:

Department Chairman, 2014 to present
 Search Committee for Political Science Faculty, 2020-2021
 Outside Member for Modern Language Department Chair Committee, 2020-2021
 Search Committee for Political Science Faculty, 2017-2018
 Search Committee for Political Science Faculty, 2012-2013
 Search Committee for Criminal Justice Faculty, 2005, 2010, conducted interviews at the American Criminal Justice Society Meeting in San Francisco, CA (2010)
 West Chair Committee, 2009, 2010, 2011, 2020
 Search Committee for Political Science Faculty, 2009
 Departmental Committee for Master’s in Social Science Creation of survey to gauge interest and subsequent data analysis, 2005
 Accompanied delegation of students to Model United Nations in Montreal, Canada in January of 2004
 Discussant on Panel on International Politics, a departmental intra-campus colloquium that meets intermittently throughout the school year, spring of 2005

Service to Students:

Director of Parliamentary Fellows Program, 2014 to present
 Faculty Advisor – Citadel in Cyprus. Took 29 cadets to Nicosia, Cyprus, to study at the University of Nicosia under the Global Semesters Program. Fall Semester 2016.
 Fulbright Campus Committee Evaluator, responsible for interviewing potential Fulbright Grant awardees from the Citadel, Fall 2013
 Advisor to Citadel Republican Society, Spring 2018 to present

Assistant Advisor to Citadel Republican Society. Fall 2013 through Spring 2016
 Served as chaperone/advisor to trip to Virginia, October 25-29, 2013
 Served as chapterone to CPAC, Spring of 2015, 2017, 2018, 2019, 2020, 2022
 Took students (~50) to Trump Inaguration (January 2107)
 Thesis Mentor to Sanja Bajramovic, Master's student at the University of Ljubljana, Fall 2013. Title of thesis: "Comparison of the Presidential Elections 2008 and 2012 in the United States of America – The Role of New Social Media and the Approach of Barack Obama."
 Thesis Mentor to Simon Rajbar, Master's student at the University of Ljubljana. Spring 2013. Title of thesis: "Theoretical approaches to the study of ideological critique."
 Thesis Mentor to Katherine Sklar. Master's student at the University of Ljubljana. Fall 2013. Title of thesis: "Analyzing the Relevancy and Impact of the Council of Europe on Slovenia."
 Organized lecture by Mark Hoch, Assistant Dean for Academic Success at Charleston School of Law to Pi Sigma Alpha students, Winter 2012.
 Organized lecture by Mike Kelly, U.S. House Republican from Pennsylvania to Pi Sigma Alpha students, Fall 2011.
 Organized lecture for Pi Sigma Alpha by Patrick Arnold, President of Arnold Group Communications, LLC, Spring 2011
 Organized lecture by Donald Fowler, former Democratic National Chairman on the 2016 presidential election in Nicosia Cyprus, November 2016
 Organized approximately 5 lectures a year for Pi Sigma Alpha meetings.
 Organized two guest lectures by Donald Fowler, former Democratic National Chairman, on the 2010 midterm elections. Public was in attendance as well.
 Advise 60 students, on average, every semester that I have been a tenure-track professor.
 Advisor of Beta Iota Rho, The Citadel chapter of Pi Sigma Alpha, Political Science Honor Society, 2003 to present
 Advisor, South Carolina Student Legislature, 2003 to 2005, 2013 to present
 Faculty coordinator for 2007 American Association of Political Consultants Academic Outreach Conference, sponsored by the University of Akron's Ray C. Bliss Institute of Applied Politics, October 11 -12, 2007
 Faculty Fulbright Committee – advisory role 2014 to present
 Served on faculty Rhodes Scholarship committee in 2006

Service to the Community:

Television:

Gave an interview to Radiotelevizija Slovenija (Radio-Television of Slovenian) on the 2012 US presidential election, October 2012

ABC—WCIV; NBC—WCBD; CBS—WCSC

Newspapers and Magazines:

Morris News Service (*Augusta Chronicle*); *The State* (Columbia); *Free Times*; *The Post and Courier* (Charleston); *The Charlotte Observer*; *Concord Monitor* (New Hampshire); *National Journal* – Technology Daily; *Charleston Business Journal*

Other:

Gave a talk at the University of Ljubljana on the logistics of applying for graduate school in the United States, March 2013

Gave presentation/talk to Charleston Lowcountry Senior Center, Summer of 2010.

Gave presentation/talk to Kiwanis Club, January 2010.

Gave presentation/talk on the 2006 Midterm Election at the request of the Rotary Club of Charleston, talk given at Holliday Alumni Center, The Citadel, November 14, 2006

Reviewer/Mentor for Academic Magnet Senior Thesis Project, 2017, 2018

Reviewer/Mentor for Palmetto Christian Academy Senior Thesis Project, 2017

Served on the committee that established Charleston Charter School for Math and Science

Treasurer for the Charleston Wrestling Training Center, 2015 to present

Member of Vestry, Cathedral Church of St. Luke and St. Paul, 2007 – 2010

Service to the Discipline:

Editor, with Mark Owens. *American Review of Politics*, Fall 2026, Special Edition: The Citadel Symposium on Southern Politics, 2026 Conference

Board Member, *American Review of Politics*, September 2026 to present.

Board Member, *PS: Political Science*, September 2018 to present

Discipline Peer Reviewer for Fulbright U.S. Scholar Program, 2017, 2018

Manuscript Reviewer for CQ Sage Press, July 2017

Reviewer for *PS: Political Science*, September 2018 to present

Reviewer for *Political Behavior*, May 2013

Reviewer for *Journal of Political Science*, November 2010

Co-editor of *The 2024 Presidential Election in the South: Déjà vu All Over again*. Bloomsbury.

Co-editor of *The 2020 Presidential Election in the South*. Lexington Books (eds.).

Co-editor of *The Future Ain't What It Used to Be?: The 2016 Election in the South*. University of Arkansas Press: Fayetteville

Co-editor of *Second Verse, Same as the First: The 2012 Election in the South*. University of Arkansas Press: Fayetteville.

Co-editor of special edition of *The American Review of Politics*. Fall and Winter 2013-2014.

Co-editor of special edition of *The American Review of Politics*. Fall and Winter 2010-2011.

Co-editor of *The 2008 Presidential Election in the South: Presidential Election Politics in Context*. 2010. Lynne Rienner Publishers: Boulder: CO

Co-editor of *A Paler Shade of Red: The 2008 Presidential Election in the South*. 2010. University of Arkansas Press: Fayetteville.

Co-Director, Panel Chair, Citadel Symposium on Southern Politics, March 3-4, 2010, Charleston, South Carolina

Discussant, Panel on "Comparative Lessons from Sub-national Policy Innovations," Midwest Political Science Association Meeting, Chicago, Illinois, April 22-25, 2010

Discussant, Panel on "2008 Presidential Election in the South," Southern Political Science Association Meeting, Atlanta, Georgia, January 6-9, 2010

Discussant, Panel on "State Politics," Southern Political Science Association Meeting, Atlanta, Georgia, January 6-9, 2010

Co-Director, Panel Chair, Citadel Symposium on Southern Politics, March 3-4, 2016,
Charleston, South Carolina

Co-Director, Panel Chair, Citadel Symposium on Southern Politics, March 6-7, 2014,
Charleston, South Carolina

Co-Director, Panel Chair, Citadel Symposium on Southern Politics, March 8-9, 2012,
Charleston, South Carolina

Co-Director, Panel Chair, Citadel Symposium on Southern Politics, March 4-5, 2010,
Charleston, South Carolina

Director, Panel Chair, Citadel Symposium on Southern Politics, March 6-7, 2008,
Charleston, South Carolina

Co-Director, Panel Chair, Citadel Symposium on Southern Politics, March 2-3, 2006,
Charleston, South Carolina

Co-Director, Panel Chair, Citadel Symposium on Southern Politics, March 4-5, 2004,
Charleston, South Carolina

Discussant, Panel on “The Intricacies of Federalism,” 2007 Northeastern Political Science
Association Conference, Philadelphia, Pennsylvania, November 15th, 2007

Judge, Best Undergraduate Paper, South Carolina Political Science Association,
Presbyterian College, Clinton, South Carolina, February 24, 2007

Editor, with Laurence W. Moreland and Robert P. Steed. *American Review of Politics*, Spring
2004, Special Edition: The Citadel Symposium on Southern Politics, 2004 Conference

Reviewer, *Politics and Policy*, a peer-reviewed political science journal (formerly known as
Southeastern Political Science Review), Fall 2003

Professional Memberships: *

American Political Science Association
Northeastern Political Science Association
Midwest Political Science Association
Southern Political Science Association
Western Political Science Association
*Not a member of all these association concurrently

Other:

Dissertation nominated for William Anderson Award (field of federalism and state and local
politics) and the Lasswell Award (field of policy studies)

Graduate Assistant, National Science Foundation--funded Comparative Courts Project, administered
by Stacia Haynie and colleagues, Louisiana State University, 2000-2001

Baton Rouge Correspondent - Voter News Service, Fall 1997 to Spring 2001

Served in the United States Marine Corps Reserve from 1987 to 1993. Honorably Discharged

Statistics and Methods:

Research Design; Multivariate Statistical Analysis; Statistical Packages: SAS, SPSS, and STATA
Professional References available upon request.