



Friday, March 31, 2023

**bluffton**
HEART OF THE LOWCOUNTRY**ACCOMMODATIONS TAX GRANT
APPLICATION**

DUE 12:00 P.M. (NOON) ON MARCH 31, 2023

Application Date	Friday, March 31, 2023
Full Legal Organization Name	Historic Bluffton Foundation
Project Name	Bluffton Welcome Center at the Heyward House
Total Project Costs	283150
Total ATAX Funds Requested	150000
Percent of Total Budget	52.98
Address	70 Boundary St., PO Box 742 Bluffton, SC, 29910
Applicant must be designated as a non-profit entity to receive ATAX funds. Please include a copy of your organization's non-profit status, such as your IRS Designation Letter.	<div> HBF-IRS.pdf</div>
Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants.	<div> TOWN OF BLUFFTON.pdf</div>
Organization Primary Point of Contact	Robert Jones Jr.
Title	Executive Director, HBF
Phone Number	(843) 757-6293
E-Mail Address	Robert@heywardhouse.org
Organization Secondary Point of Contact	Amanda Denmark
Title	President, HBF
Phone Number	(843) 816-6362
E-Mail Address	amanada@pscottarch.com

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description:

Founded in 1981, the mission of Historic Bluffton Foundation is to protect, preserve, and promote the history and cultural heritage of the Town of Bluffton, South Carolina and surrounding environs through education, marketing, hands-on preservation of buildings and sites, maintenance of the Caldwell Archives, and operation of the Heyward House Museum and Welcome Center (hereafter known as the Heyward House).

From the inception of the Heyward House Project in 1998, the Foundation's vision has been to be recognized as the pre-eminent authority, resource, and proponent for historical preservation in Bluffton and southern Beaufort County. The Foundation was southern Beaufort County's first institution to recognize the importance of historic preservation in creating a sustainable tourism industry that benefits all of our local businesses and restaurants. For over 20 years, it has served as both a house museum and the Welcome Center for the Town of Bluffton, providing visitors with an informative and memorable experience.

Funds from Bluffton ATAX will be used specifically to operate and maintain the Heyward House as the Town's Welcome Center, including sending packages to perspective tourists and residents. These uses include expenses related to salaries and benefits, utilities, cleaning, bank fees, insurance, advertising and marketing, shipping and postage, supplies, equipment, upgrades, repairs and maintenance, landscaping, pest control, accounting, security, website, and capital improvements.

Since 2000, the Heyward House Museum has been Bluffton's central attraction, providing visitors and local citizens with information about the region's history, culture, and sites, while promoting local businesses, restaurants, and special events. As intended when the Historic Bluffton Foundation created it, the Heyward House Museum has had a profound economic impact on the town. Its advocacy for historic preservation in Bluffton and the surrounding environs has undoubtedly been one of the driving forces behind its growth as a place to experience art, culture, and Bluffton's fascinating history in this special corner of Carolina.

As the Welcome Center, we extensively promote local businesses, including our house and walking tours, competitor tour companies, restaurants, art galleries, shops, events, services, walking and nature trails, and Bluffton's growing list of small parks and playgrounds. Hilton Head Island's thousands of annual visitors are looking for a more organic arts and culture experience, an experience that they can find in Bluffton. Many visitors want to make their trip to Bluffton fulfilling, so they engage in as many experiences as their time allows. While our focus is primarily on the historic district, we also send a considerable number of visitors to Palmetto Bluff and other greater Bluffton and Beaufort County destinations, as this list is growing as well. Visitors welcome our knowledgeable and friendly staff to guide them in all of their greater Bluffton pursuits.

Through our marketing efforts, plus our partnerships with other local organizations, the Heyward House is known as "the place to start" when exploring the Town of Bluffton and surrounding area.

Detailed monthly reports are submitted to the Finance Department along with financial records, invoices, receipts, social media reports, and visitor statistics. In fiscal year (FY) 2021/2022, the Heyward House Museum and Welcome Center served 16,423 total visitors. Of the total guests that came last fiscal year, 8,653 came for tours or information; of that total, we captured location information from 7,715 people and 6,794 were non-locals. This brings our percentage of non-locals/"impact visitors" to 88% based on the data we were able to capture. Rentals (48%) were the dominant accommodation, with the remaining visitors staying at timeshares (18%), private residences (14%), and hotels (20%). The remaining visitors are considered "Other" and were for business, archives, events, and rentals. The number of visits seen last year and in recent months demonstrates a strong resurgence in tourism where even in February and March, the Heyward House saw strong numbers. Of our visitors last fiscal year, 44% learned about us through word of mouth, 28% from the web/internet, 14% from signs, and 12% through print media. The remaining 2% learned about us through radio/TV or other means. Of the total visitors, 8,662 came for information and/or tours at the Heyward House.

Those are called "Impact Visitors". The remaining visitors are considered "Other" and were for business, archives, events, and rentals.

Well stocked Welcome Center racks are now housed both on the back porch and in the gift shop. The welcome center maps and brochures are now available 24/7. We have a knowledgeable attendant in the Heyward History Gift Shop where guests are greeted by staff, provide recommendations, and answer

questions. Personal communication and engagement are fundamental when greeting visitors and certainly of utmost importance when providing welcome center services.

We market the Heyward House Museum and Welcome Center at the hotels throughout Beaufort County. Brochures are placed in the rack card stands at the hotels or with the concierge. They are also available at the airport, in all the SC Welcome Centers in South Carolina, the Gullah Geechee Museum, the Hilton Head-Bluffton Chamber of Commerce, Greater Bluffton Chamber of Commerce, and Beaufort Regional Chamber of Commerce, at the Town of Bluffton, and other historic sites, including Penn Center and the John Mark Verdier House Museum. Our staff actively promotes group tours of the Heyward House, the Garvin-Garvey House and Old Town Bluffton with hotels, timeshares and tour companies, with monthly visits from Marriott and Spinnaker tour buses hopefully returning in the near future.

Our volunteer base is beginning to grow again as the Pandemic definitely kept many of our older volunteers away for an extended period of time. The trend is now reversing with 5 new volunteers in various project areas who have enlisted in the last 2 months. These volunteers serve as gardeners, docents, archivist and other important areas attending to the buildings, grounds, and visitors with passion, professionalism and energy. We expect this list of volunteers to expand greatly this year. In December 2019, a Memorandum of Agreement (MOA 2017-69) between the Town of Bluffton and the Historic Bluffton Foundation was executed. It expanded the services that the Historic Bluffton Foundation provides for the Town including but not limited to the interpretative programming at the Garvin-Garvey House.

In October 2017, the Historic Bluffton Foundation began providing tours of the Garvin-Garvey House. Over the next two fiscal years, 1,335 visitors participated in FY 2018-2019, and 2,115 visitors participated in FY 2019/2020. However, the pandemic caused a significant impact on the momentum of tours of this historic building, due to the closure of the interior for health concerns, as well as the loss of interpreters. To revive the momentum, the Foundation has found three new interpreters, and is now anticipating the most tours since the House opened for this purpose. Tours will be available on Tuesdays, Thursdays, and Saturdays beginning in late March. All interpreters will be trained personally by the Foundation's Executive Director, Robert S. Jones Jr. and experienced docents from the Heyward House. The funds to assist in filling these hours are coming from the Town of Bluffton in the form of a reimbursement.

Capital Improvements

The Foundation is about to undertake a significant number of capital improvement projects at the Heyward House starting in March of 2023 utilizing restricted funds from the South Carolina Parks and Recreation grant. This funding will assist the Foundation in making needed improvements, greatly increasing its use as a gathering place for all types of events and work, and assist with the continued preservation of the site. The Foundation's board believes these projects will allow the Heyward House to move closer to some form of self-sufficiency as we get closer to the anticipated move of the Welcome Center in 2025. The Foundation is developing a multi-tiered strategy that will give it, and its properties, long-term sustainability. Event rentals are certainly one component of this strategy. Projects slated for completion this year are as follows:

- Installation of a new fire pit - permitted by TOB and project underway
- Purchase of outdoor patio furniture for the Common Grounds such as around the -fire-pit
- Repair/Replace HVAC system and dehumidifier system at the Heyward House
- Upgrade exterior low-voltage lighting system
- Multi-stage pruning of trees
- Installation of a "living" fence at the rear of the property
- Installation of a small service yard at the rear of the property
- Enslaved persons cabin painting, floor repair, interior lime wash, preservative roof treatment
- Cedar shake roof replacement on the summer kitchen (Beaufort County Grant)
- A NHPA regulation horse-shoe pit - a classic sporting activity from the 2nd Century Greeks, an activity that will be available at events.

Additional projects are being closely examined and scheduled, including the replacement of aggregate

throughout Common Grounds, the repair of the Heyward House front porch, interior painting, the construction of a bathroom/storage facility at rear of the property, the installation of a water feature in the front yard near the new sidewalk, interior security cameras and an electric golf cart for tours. The Foundation is also beginning repair work on the 1890 Colcock-Teel House's foundation. Work on this historic structure is not part of this grant request, but the Committee should be interested that the Foundation has started the process of identifying areas of issue in the structure and searching for funding for this multi-stage restoration, currently estimated to cost over \$200,000. These efforts will make the structure serviceable for a number of purposes, enabling it to financially sustain itself, while also benefitting the Foundation in multiple other areas of its mission. The Foundation's exciting plans for its future use will be shared with the public down the road.

These capital improvements show a strong commitment by the Foundation's board of directors, volunteers and staff who continue to strive on a daily basis to move the Heyward House project forward in a positive direction while always providing a good first impression for visitors to the town of Bluffton.

Arts/Cultural projects

The Heyward House has will continue to host multiple arts and cultural events in FY 2023/4.

Programming is an important component of the Foundation's mission. We expect strong attendance at all of our scheduled functions this year.

-Bluffton Historic Preservation Symposium After-Party May 18, 2023

-Burning of Bluffton - Weekend of June 6

-Joe McGill and Herb Frazier - Talk and Book Signing *Sleeping with the Ancestors: How I Followed the Footprints of Slavery* on July 8 , 2023. The cabin is featured in one chapter of this book.

-Heyward House Living Historian Program - featuring two studied interpreters --Steve Quick in the Blue and Jackson Cannady in the Grey. Steve has been featured at the Coastal Discovery Museum and many area public schools. The first date they will appear at the Heyward House is May 8, 2023 schedule dates TBD.

-Gullah Market Days- Will mainly be held on the weekends throughout the year. April 8th will be the first date this will be held.

-History/Historic Preservation Speaker Series coming early fall of 2023

-Boiled Peanut Festival-Held in October of 2023 at Martin Park and Common Grounds, date TBD. This event has a significant draw. 1,250 people were counted at this event in 2022.

The Foundation's staff is in the process of planning additional events and functions for the summer, fall, and winter of 2023 such as traditional craft classes like sweet grass basket making, indigo dying and other innovative and interesting educational activities.

Caldwell Archive

The Caldwell Archive, where it really all started for the Foundation and historic preservation in Bluffton, has a new leader and new purpose as it picks up the digitization process that fell off around the beginning of the Pandemic. This process, led by Lead Archivist Ms. Doreen Bauman, is a very important endeavor providing researchers, Town and Foundation staff critical information important to this communities preservation and education efforts. Without these records, the local preservation work would and continue to be very difficult. By uploading our documents and photographs with meta-data, keywords and tags, the process creates a searchable archival website. The value to research and preservation of our town and this particular information is invaluable. We will also be adding hours for direct access to the archive.

All advertising/marketing paid for with Town of Bluffton Accommodations Tax dollars must incorporate the branding shown here: [Town of Bluffton Brand Standards](#). The use of the Town's logo must meet the design standards outlined at the aforementioned link and be approved by the Town. Designs may be submitted electronically using this [link](#). Please allow five (5) business days for approval.

Impact on or Benefit to Tourism:

See above

"Tourist" means a person who does not reside within the corporate limits of the Town or within a Town zip code that takes a trip into the corporate limits of the Town for any purpose, except daily commuting

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

Project/Event Start Date:

Friday, March 31, 2023

Project/Event Completion Date:

Friday, March 31, 2023

Multi-Year Project/Event?

No

Permits Required, if any:


HBF will secure any permits needed for future projects or events.

Additional Comments:
The Welcome Center is operated year round. Hours of operation are Monday-Friday 10-5 and Saturdays 11-4. We observe eight calendar holidays and a one week in January for a deep cleaning of the buildings.

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION


FINANCIAL INFORMATION

Project/Event Line Item Budget




HBF Budget 2023_2024 withpdf

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement




June 22 Balance Sheet.pdf



June 22 eoy P&L.pdf

Financial Guarantee



HBF minutes 022123 2.pdf

Please list all contributions made to the project/event by the sponsoring organization. This shall include both monetary and in-kind goods and/or services, as applicable.

Contribution	104050
Amount/Value	104050
Contribution	N/a
Amount/Value	0

Have you requested, received or been awarded funding from other sources or organizations (including additional ATAX funds from other local entities) for this project/event?

Yes

If yes, please list all sources and amounts:

Funding Source	Beaufort County ATAX (restricted)
Amount	10000
Funding Source	Private
Amount	5000
Funding Source	SC Parks Rec, and Tourism Grant (just received in February, restricted use for improvements)
Amount	500000

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

PRIOR RECIPIENT'S REPORT

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information. Only the information for the most recent round of funding is required. If you have not received ATAX funding from the Town of Bluffton, please answer "No" and skip this section and sign and submit your application.

Has your organization previously received ATAX funds from the Town of Bluffton?

Yes

Project/Event Name	Town of Bluffton Welcome Center at the Heyward House Museum
Year	2021/2022
Amount Awarded	116555
Was project completed?	Yes

How were the funds used?

To operate and maintain the Heyward House as the Town's welcome center, including sending packages to prospective visitors and residents. Funds were used for Heyward House expenses, such as salaries and benefits, utilities, bank fees, insurance, advertising and marketing, shipping and postage, supplies, equipment upgrades, repairs and maintenance, landscaping, pest control, cleaning, accounting, security, website, and capital improvements.

What impact did this project/event have on the community or benefit tourism? Describe how the tourism data was measured.

The Town of Bluffton's Welcome Center at the Heyward House Museum is an invaluable asset to the local community and to tourism. It provides a central hub for visitors to learn about the history of the town and its attractions, as well as to access information about local services and events. By providing

an inviting environment, the Welcome Center encourages tourists to explore the town and experience its culture. Additionally, the museum educates residents and visitors alike on the unique cultural heritage of the area, further enhancing the sense of community and drawing people to the area. The Welcome Center is an invaluable resource for the Town of Bluffton and its citizens.

Please provide the project/event budgets for the previous two (2) years.



Approved Budget 2021_2022pdf



Approved Budget 2021_2022.pdf



FINAL REPORT_2021_2022.pdf

All applicants will be required to come before the Accommodations Tax Advisory Committee (ATAC) and answer any and all questions when scheduled to do so.

Any organization awarded funds for advertising/marketing must incorporate the Bluffton Heart of the Lowcountry brand logo in all promotional materials and advertising.

The South Carolina Freedom of Information Act (FOIA) defines a “public body” as any organization or corporation supported in whole or in part by public funds or expending public funds. If awarded, your organization's acceptance of public funds from the Town of Bluffton may cause your organization to come within the meaning of “public body” as defined by the Freedom of Information Act. S.C. Code Ann. §30-4-10, et seq. (Supp. 2002). Accordingly, this is to advise that by accepting public funds, your organization may be subject to the South Carolina Freedom of Information Act.

By submitting this application, the organization certifies that it has read and understands the paragraphs above. The organization additionally certifies that it does not discriminate in any manner on the basis of race, color, national origin, age, sex, disability, religion, or language, and that all funds that may be received by the applicant organization from the Town of Bluffton, South Carolina will be solely used for the purposes set forth in this application and will comply with all laws and statutes, including the South Carolina Code of Laws regarding Allocations of Accommodations Tax Revenues.

By typing your name below, you are signing this application electronically. You agree that your electronic signature is the legal equivalent of your manual signature on this application.

Robert S Jones Jr.

Signatory's Title or Position

Executive Director

Internal Revenue Service
District Director

Department of the Treasury

Date: DEC 15 1983

The Bluffton Historical Preservation
Society, Inc.
PO Box 742
Bluffton, SC 29910

Our Letter Dated:
February 24, 1987

Person to Contact:
William Anderson/jdf

Contact Telephone Number:
(404) 221-4516

Employer Identification Number:
57-0724129

File Folder Number:
580015849

This modifies our letter of the above date in which we stated that you would be treated as an organization which is not a private foundation until the expiration of your advance ruling period.

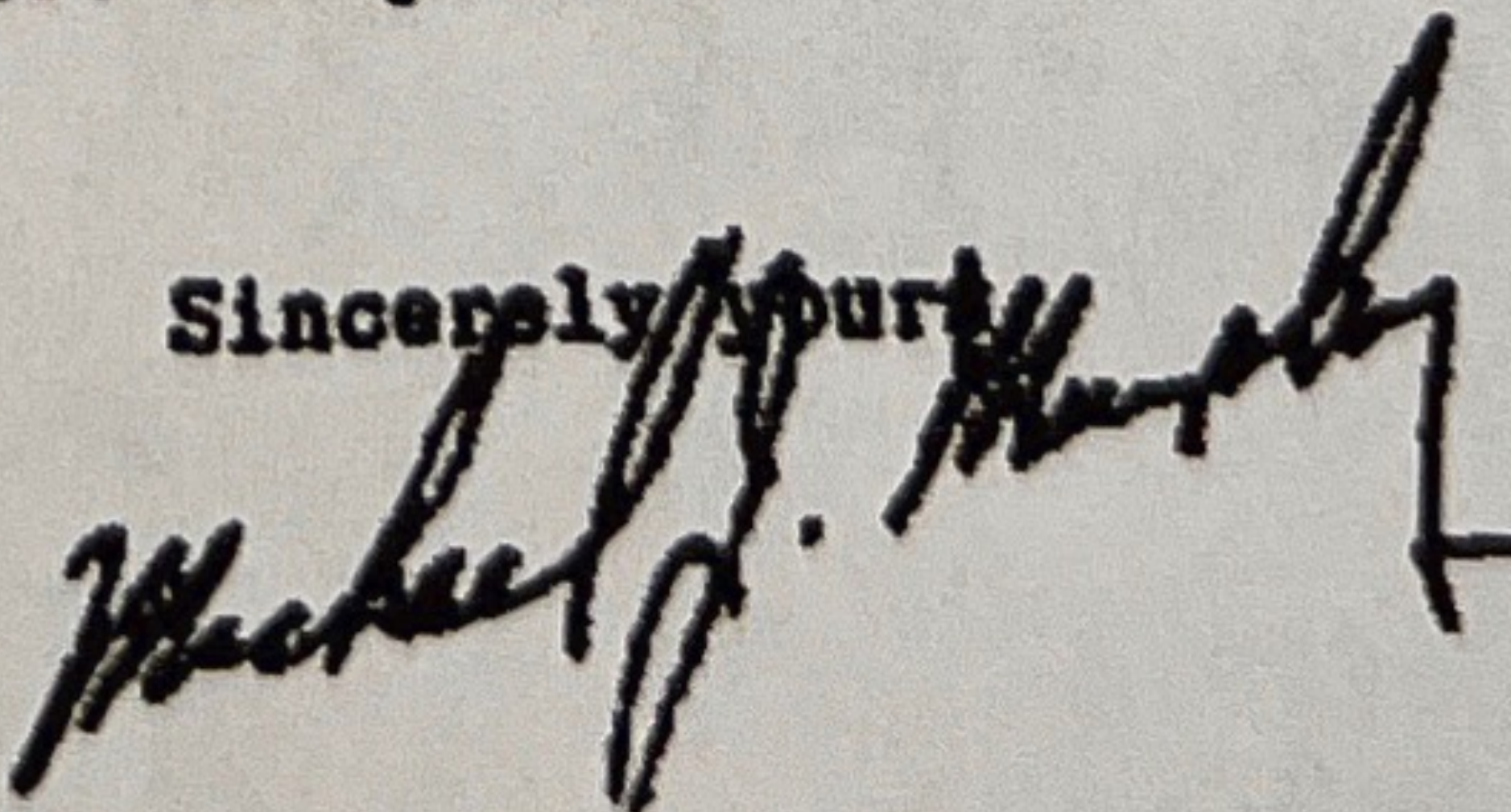
Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section _____. Your exempt status under section 501(c)(3) of the code is still in effect.

Grantors and contributors may rely on this determination until the Internal Revenue Service publishes notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section _____ status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section _____ organization.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



District Director

* 170(b)(1)(A)(vi) & 509(a)(1)

TOWN OF BLUFFTON

May 03, 2022

DATE ISSUED

April 30, 2023

EXPIRES

LIC-05-22-044632

LICENSE NUMBER

8499

BUSINESS ID

Bluffton Historic Preservation Society, Inc.

COMPANY NAME

Heyward House Museum and Welcome Center

DBA NAME

Non Profit - Museums

BUSINESS TYPE

BLUFFTON WELCOME CENTER

DESCRIPTION/CONDITIONS

70 BOUNDARY ST
BLUFFTON SC 29910-
BUSINESS LOCATION

PO Box 742
Bluffton SC 29910-
MAILING LOCATION

Historic Bluffton Foundation
Operational Budget (DRAFT)
Fiscal Year 2023-24

2023-24 Budget			
Welcome			
Total Budget	Center Only Budget	HBF Only Budget	
Revenues			
Grants			
Private Foundations	5,000		5,000
Town of Bluffton ATAX	150,000	150,000	
Beaufort County ATAX	10,000	-	10,000
Total Grant Income	165,000	150,000	15,000
Sales and Service Revenues			
Gift Shop	12,250	11,000	1,250
Memberships	20,000		20,000
Tours/Programs	14,500	14,000	500
Special Events	15,500	-	15,500
Total Sales & Service	62,250	25,000	37,250
Other Revenues			
Colcock-Teel Endowment	10,000		10,000
Archival Income	300		300
Donations	12,000	4,100	7,900
Rental Income/Common Ground	12,000	-	12,000
Caretaker Income	21,600		21,600
Total Miscellaneous	55,900	4,100	51,800
Total Revenues	283,150	179,100	104,050
Expenditures and Other Uses			
Salaries & Benefits	130,000	110,000	20,000
Mortgage (retired in 2021)	-	-	-
Interest Expenses	2,500	1,250	1,250
Bank Fees	1,800	1,400	400
Insurance	17,000	15,000	2,000
Utilities	18,000	17,000	1,000
Gift Shop Expenses	8,000	-	8,000
Special Events	12,000	-	12,000
Programs	3,500	1,250	2,250
Advertising and Marketing	12,250	10,250	2,000
Shipping/Postage	1,200	1,000	200
Dues & Subscriptions	1,500	1,000	500
Office Supplies	2,000	1,750	250
Equipment Upgrades	5,000	500	4,500
Professional Development	1,000	-	1,000
Contract Services			
Accounting	15,500	13,500	2,000
Cleaning Services	2,000	1,800	200
Consulting Services	1,500		1,500
Landscaping	8,000	1,000	7,000
Pest Control	1,200	900	300
Repairs/Maintenance	37,250	-	37,250
Security	250	-	250
Website	1,700	1,500	200
Total Expenditures and Other Uses	283,150	179,100	104,050
Revenues Over/(Under)	- 0	- 0	- 0

Historic Bluffton Foundation, Inc.
Balance Sheet
As of June 30, 2022

Cash Basis

	<u>Jun 30, 22</u>
ASSETS	
Current Assets	
Checking/Savings	
Coastal States # 6767 Operating	13,799.42
PSB Specified Donation Account	250.00
Coastal States #7294- Archives	1,402.42
Coastal States #2674 - MM	195,837.16
Petty Cash	125.00
Total Checking/Savings	<u>211,414.00</u>
Other Current Assets	
Promises to Give	29,554.70
Inventory	12,500.00
Utility Deposits	300.00
Total Other Current Assets	<u>42,354.70</u>
Total Current Assets	<u>253,768.70</u>
Fixed Assets	
Vehicles - Truck	5,000.00
Accumulated Depreciation	-19,110.50
Furniture, Fixtures & Equipment	35,814.28
Property - Heyward House	611,248.25
Computer Equipment	4,942.89
Total Fixed Assets	<u>637,894.92</u>
Other Assets	
Restricted Assets	0.00
Restricted Asset - Teel House	338,889.40
Total Other Assets	<u>338,889.40</u>
TOTAL ASSETS	<u><u>1,230,553.02</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	5,391.50
Total Accounts Payable	<u>5,391.50</u>
Other Current Liabilities	
Direct Deposit Liabilities	-1,981.69
Payroll Liabilities	1,722.12

Historic Bluffton Foundation, Inc.
Balance Sheet
As of June 30, 2022

Cash Basis

	Jun 30, 22
Total Other Current Liabilities	-259.57
Total Current Liabilities	5,131.93
Long Term Liabilities	
N/P SBA Loan	95,457.50
Total Long Term Liabilities	95,457.50
Total Liabilities	100,589.43
Equity	
Net Assets	1,127,766.37
Retained Earnings	-93,955.22
Temporarily Restricted Equity	0.00
Net Income	96,152.44
Total Equity	1,129,963.59
TOTAL LIABILITIES & EQUITY	1,230,553.02

Historic Bluffton Foundation, Inc. **Profit & Loss** July 2021 through June 2022

Cash Basis

	Jul '21 - Jun 22
Ordinary Income/Expense	
Income	
Rental Income - Teel House	23,400.00
Archives	54.00
ATAX Beaufort County	31,044.00
Donations	13,454.98
Gift Shop Income	1,954.20
Grant Income Private Foundation	5,000.00
ATAX Town of Bluffton	130,381.55
Interest Income, MM Account	247.30
Membership	5,255.00
Rental Income	8,740.25
Special Events	13,696.96
Tours/Program Income	3,839.00
Total Income	237,067.24
Expense	
Depreciation Expense	5,945.77
Archives expenses	756.00
Bank Service Charges	752.62
Capital Improvements	0.00
Cleaning	525.00
Computer Software/Upgrades	2,532.99
Dues and Subscriptions	1,104.99
Gift Shop Expense	230.00
Insurance	12,326.30
Interest Expense	2,557.50
Landscape Expense	3,717.37
Marketing - Operational Exp.	4,926.05
Office Supplies	1,296.06
Payroll Tax Expense	6,895.99
Pest Control	339.96
Postage and Delivery	215.40
Professional Fees	10,200.00
Program Expense Misc.	0.00
Property Tax Expense	489.01
Repairs and Maintenance	6,170.02
Salaries & Wages	89,446.84

Historic Bluffton Foundation, Inc.
Profit & Loss
 July 2021 through June 2022

Cash Basis

	Jul '21 - Jun 22
Special Events Expenses	3,532.83
Utilities	12,724.14
Website Expense	829.96
Total Expense	167,514.80
Net Ordinary Income	69,552.44
Other Income/Expense	
Other Income	
Other Income	26,600.00
Total Other Income	26,600.00
Net Other Income	26,600.00
Net Income	96,152.44



BHF Monthly Board of Trustees Meeting

Tuesday, February 21, 2023

Conference Room at the Heyward House

Attendance – Amanda Denmark, Jen Sommerville, John Sulka, Paul Tollefson (until 5:08),

Katie Epps, Susan Wetmore

Staff – Robert, Kate, Jared

1. Call to order at 4:30pm
2. Adoption of Agenda
 - Motion to accept - John, 2nd – Katie
3. Meeting Minutes (Carol out)
 - Motion to accept – Katie, 2nd – Paul
 - Acceptance of minutes with adjustment: New/Old Business from Jan meeting led by Jen, Amanda left meeting early
4. Treasurer's Report – John Sulka
 - Motion to accept – Susan, 2nd – Katie
5. Heyward House and HBF Director's Reports – Kate and Robert
 - Kate to resign effective March 10
 - Colcock -Teel House updates
 - Robert gave presentation on origin of Teel House doors
 - Robert had conversation with Jason Ward on legal restrictions with property
 - Discussion to form committees for Preservation, Finance, Membership, Fundraising
 - Draft budget FY23/24 Vote to approve – John, 2nd – Katie – Unanimous approval
 - Membership event April 29, 6-9pm
 - Garvin Garvey guide discussion
6. New Business/Old Business – Amanda Denmark
7. Adjourned at 5:29pm
 - Motion – John, 2nd – Katie

Historic Bluffton Foundation

Approved Operational Budget with current year projections

Fiscal Year 2021-2022

						Approved 2021-2022 Budget		
						Welcome		
						Center		
						HBF		
						Only		
						Only		
						Budget		
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Historic Bluffton Foundation
Approved Operational Budget with current year projections
Fiscal Year 2021-2022

				Approved 2021-2022 Budget		
				Welcome		
				Center		
				Only		
				Budget		
				HBF		
				Only		
				Budget		
Revenues						
	Grants					
	Private Foundations			8,000		8,000
	Town of Bluffton ATAX			169,000	169,000	
	Beaufort County ATAX			10,000	5,000	5,000
		Total Grant Income		\$ 187,000	174,000	13,000
	Sales and Service Revenues					
	Gift Shop			1,500	1,250	250
	Memberships			\$ 10,050		10,050
	Tours/Programs			7,000	3,500	3,500
	Special Events			\$ 7,000	3,500	3,500
		Total Sales & Service		\$ 25,550	8,250	17,300
	Other Revenues					
	Colcock-Teel Endowment			\$ 10,000		10,000
	Misc. Income					
	Archival Income			500		500
	Donations			9,000	5,250	3,500
	Rental Income			7,500	3,750	3,750
	Caretaker income			21,600	16,000	5,600
	Total Revenues	Total Miscellaneous		\$ 48,600	25,000	23,350
				\$ 260,900	207,250	53,650
	Expenditures and Other Uses					
	Salaries & Benefits			150,000	130,000	20,000
	Mortgage					
	Interest Expenses			1,000	500	500
	Archives			1,000		1,000
	Bank Fees			1,600	1,400	200
	Insurance			14,000	12,000	2,000
	Utilities			17,500	14,000	3,500
	Gift Shop Expenses			1,000	500	500
	Special Events			1,500	750	750
	Programs			2,250	2,250	
	Advertising and Marketing			5,000	4,000	1,000
	Shipping/Postage			1,200	1,000	200
	Dues & Subscriptions			1,250	500	750
	Office Supplies			2,000	1,750	250
	Equipment Upgrades			5,000	4,000	1,000
	Professional Development			1,000	300	700
	Contract Services					
	Accounting			13,500	11,000	2,500
	Cleaning Services			1,800	1,600	200
	Consulting Services			500		500
	Landscaping			4,000	3,500	500
	Pest Control			1,000	750	250
	Repairs/Maintenance			10,000	6,100	3,900
	Security			300	150	150
	Website			1,500	1,200	300
	Capital Improvements			23,000	10,000	13,000
	Total Expenditures and Other Uses			\$ 260,900	207,250	53,650
	Revenues Over/(Under) Expenditures					
				-	-	-

Accommodations Tax Funding Final Report FY2021/2022

1. PROJECT INFORMATION:

Organization Name: Historic Bluffton Foundation (HBF)
Project Name: Bluffton Welcome Center at the Heyward House
Contact Name: Kate Creech Phone: 843-757-6293

2. PROJECT COMPLETION:

Were you able to complete the project as stated in your original application? Yes

3. PROJECT SUCCESS:

Detailed monthly reports are submitted to the Finance Department along with financial records, invoices, receipts, social media reports, and visitor statistics. A summary of our End-of-Year report is below. In fiscal year (FY) 2021/2022, the Heyward House Museum and Welcome Center served **16,423 total visitors. Of the total guests that came last fiscal year, 8,653 came for tours or information; of that total, we captured location information from 7,715 people and 6,794 were non-locals.** This brings our percentage of **non-locals/“impact visitors” to 88%** based on the data we were able to capture. Rentals (48%) were the dominant accommodation, with the remaining visitors staying at timeshares (18%), private residences (14%), and hotels (20%). The remaining visitors are considered “Other” and were for business, archives, events, and rentals. Our numbers nearly double after we reopened in March of 2022 for house tours. March-May has historically been our busiest time of the year, with March alone typically accounting for 1500-2000 visitors. After reopening the house museum in March of 2022, we totaled over 5,000 visitors between March-May. Prior to reopening the house to the public, we still saw nearly 10,000 visitors on property. These visitors were able to access maps and information via the back porch of the Welcome Center. This allowed for the Welcome Center maps and brochures to be available 24/7. We had a temporary office in the Heyward History Store, so staff could greet guests, provide recommendations, and answer questions. Personal communication and engagement with visitors are of utmost importance when providing Welcome Center services.

Through our marketing efforts, plus our partnerships with other local organizations, the Heyward House has become known as “the place to start” when exploring the Town of Bluffton. Of our visitors last fiscal year, 46% learned about us through word of mouth, 40% from the web/internet, 5% from signs, and 9% through print media.

In 2021, we revamped our walking tours to include a tour guide system. The tour guide uses a microphone, and the participants wear an earpiece to listen. This system allows us to have multiple groups social distance on a tour. We also rearranged the rooms and created displays in front of the windows for visitors to learn about the history of Bluffton, the families of the Cole-Heyward House, Gullah Geechee culture, importance of oysters, and the Civil War. The lights are on kept on inside the house during the workday. We created a porch and grounds tour to temporarily replace our house tour. This tour includes all aspects of our house tour while strolling the grounds and porches. Pending windy weather or rain, the outbuildings are open for viewing to all visitors. We removed touch points and installed rope across the summer kitchen so visitors cannot enter. This process remained consistent until we reopened the house museum to the public in March of 2022.

In the Spring/Summer of 2021, the “Arbor of Light” project was completed. The purpose of this was to extend the event area and the ability to accommodate larger events. It’s quickly become a gathering spot for patrons of the weekly Farmer’s Market located at Martin Family Park. Each Thursday, we see a gathering of locals and non-locals on Common Ground as they enjoy live music and food/beverage.

Our closure during COVID-19 greatly impacted our visitor statistics in 2020 - 2021 including our ability to host local events like we have in previous years. In 2019, we were able to generate upwards of \$20,000 in event revenue alone, hence our goals of increasing our social event calendar to boost our sustainability with generating revenue. We have the Boiled Peanut Festival planned for this year and have strong goals to increase our events schedule to get back to our good-ol-days of hosting a variety of local events as well as outside events like weddings, reunions, and business events.

4. PROJECT ATTENDANCE:

	FY2020/2021	FY2021/2022
Total budget of Project of Event	225,000	207,250

Amount of Bluffton ATAX received	116,555	100,827
Amount funded by other sources	51,378	37,361
Total attendance to Heyward house	7,532	16,423
Information and Tours	4,701	8,653
Total tourists	3,576	6,794

5. METHODS:

Before March 2020 visitor information was collected in a Guest Book on a book stand near the entrance of the Heyward House. In the guest book, we collected their name, city, state, where they were staying (hotel, timeshare, rental, private residence, other), how they heard about us (Word of Mouth, Ads, Internet, Website, Signs, other) and if they were taking a tour. Since March 2020, we have minimized touchpoints to lessen the virus spread. Visitor information is now collected verbally through our interactions with visitors. Information is tabulated on our reconnaissance forms, reconciled by staff, and presented monthly, quarterly, and annually to board members and to the Town of Bluffton. Prior to our temporary closure for COVID-19, staff and docents began asking visitors for information instead of having them sign the book.

6. PROJECT BUDGET:

Please see the Welcome Center's end of year financial report for FY2021/2022. Our independent audit is also included in this packet.

7. ORGANIZATION SIGNATURE:

Name: Kate Creech

Title: Director of Events & Administration for HBF

Signature: _____

Date: July 30, 2022