

To: Accommodations Tax Advisory Committee
From: Old Town Bluffton Merchants Society
December 30, 2022

Attached please find our 2023 Accommodations Tax Fund Request application that outlines our plans to promote the ambiance and cultural experience of Old Town Bluffton to tourists by creating and executing a marketing and promotion plan that includes events and advertising in various media along with the necessary documents. This request is presented in a yearly budget format, January 1, 2023 – December 31, 2023, coinciding with our fiscal year, and is specifically requesting funds of \$14,000 to insure proper funding to continue our advertising/marketing campaign for the year.

Sponsor Name: Title: **OLD TOWN BLUFFTON MERCHANTS**

Sponsor Address: **PO BOX 354, BLUFFTON, SC 29910**

Sponsor Phone: **843-815-2472**

Contact Name: Title: **MARY O'NEILL, Treasurer/Secretary OTBM**

Contact Address: **PO BOX 354, BLUFFTON, SC 29910**

Contact Phone: **843-815-2472**

**ACCOMMODATIONS TAX ADVISORY COMMITTEE
TOWN OF BLUFFTON, SOUTH CAROLINA**

ACCOMMODATIONS TAX FUNDS REQUEST APPLICATION

For Office Use Only		
Date Received:	Time Received:	By:

Date: **December 30, 2022** Total Project Cost **\$27,500.00** Annual Amount Requested **\$14,000.00**

SUBMIT 15 COMPLETE COPIES OF APPLICATION

ANSWERS MUST BE TYPEWRITTEN

A. PROJECT NAME: **BLUFFTON AS A DESTINATION**

B. ORGANIZATION: **OLD TOWN BLUFFTON MERCHANTS SOCIETY – A NOT FOR PROFIT ORGANIZATION**

MUST BE A NOT-FOR-PROFIT ENTITY

Sponsor Name: Title: **OLD TOWN BLUFFTON MERCHANTS SOCIETY**

Sponsor Address: **PO BOX 354, BLUFFTON, SC 29910**

Sponsor Phone: **843-815-2472**

Contact Name: Title: **MARY O'NEILL, TREASURER/SECRETARY OTBMS**

Contact Address: **PO BOX 354, BLUFFTON, SC 29910**

Contact Phone: **843-815-2472**

C. DESCRIPTION OF PROJECT:

1 General description.

OLD TOWN BLUFFTON MERCHANTS SOCIETY WAS FORMED EIGHTEEN YEARS AGO "TO ESTABLISH OLD TOWN BLUFFTON AS A DESTINATION FOR TOURISTS AND RESIDENTS BY HIGHLIGHTING ITS UNIQUE HISTORIC, CULTURAL, DINING AND SHOPPING OPPORTUNITIES."

If arts/cultural activity, give specific description of project (attach additional sheets, if needed).

THIS REQUEST IS FOR OUR MARKETING CAMPAIGN PROMOTING OLD TOWN BLUFFTON AS A GREAT DESTINATION FOR VISITORS THROUGH THE PROMOTION OF OLD TOWN BLUFFTON AS A HISTORIC RIVERFRONT COMMUNITY OFFERING AN ECLECTIC BLEND OF ARTS, HISTORY, CULTURE AND NATURAL BEAUTY ALONG WITH ART-CENTRIC EVENTS, SUCH AS THE ART WALKS, SPRING FLING ART WEEKEND, ETC. (SEE ATTACHED EXHIBIT 1).

2 Impact on or benefit to tourism (if required under the law).

THE WHOLE PROJECT IS DESIGNED TO INCREASE TOURISM TO BLUFFTON THROUGH THE GENERATION OF REGIONAL PUBLICITY INCLUDING BUT NOT LIMITED TO PRINT ADVERTISING, RADIO, DIGITAL, SOCIAL MEDIA, WEBSITE AND MAPS.

3 Duration of project. Starting date: Completion

FOR THIS REQUEST THE ADVERTISING AND PROMOTION IS PRESENTED IN A YEARLY BUDGET, JANUARY 1, 2023 - DECEMBER 31, 2023. A YEARLY BUDGET IS ATTACHED - EXHIBIT 2.

4 Permits required (if any). **WILL FILE PERMITS AS REQUIRED**

5 Additional comments.

OUR ADVERTISING PROGRAMS HAVE BEEN VERY SUCCESSFUL IN BRINGING NEW VISITORS TO OUR AREA. IN CONJUNCTION WITH THE CHAMBER WE STRIVE TO BRING TOURISTS TO BLUFFTON. WE BELIEVE THAT BROADENING OUR MARKET WITH ADVERTISING WILL ENCOURAGE THE CONCEPT OF "MAKING BLUFFTON A DESTINATION PLACE" AND THAT LOCAL SHOPS, GALLERIES, HOTELS AND RESTAURANTS WILL PROFIT. AS THE SUCCESS OF THE OLD TOWN DISTRICT CONTINUES TO ATTRACT TOURISTS AND THEIR CONSIDERABLE EXPENDITURES, IT ALSO ATTRACTS POTENTIAL NEW BUSINESSES AND RESIDENTS TO THE AREA. THE QUAINTESS OF THE OLD TOWN DISTRICT HOOKS THE TOURIST TO POTENTIALLY BECOME A RESIDENT AND/OR NEW BUSINESS OWNER.

D. FUNDING:

1 Source of funds.

MEMBERSHIP DUES AND TOWN OF BLUFFTON ACCOMMODATIONS FUNDS.

THIS ACCOMMODATION REQUEST

- 2 Have you requested funding from other sources or organizations for this project?
Yes _____
No X _____
3. Contributions to the project by the sponsoring organization: **\$14,500.00 IS PROJECTED TO BE COLLECTED FROM MEMBERSHIP DUES AND WEBSITE ADS THIS YEAR.**

E. FINANCIAL INFORMATION (ADHERE TO STRICTLY):

- 1 A line-item budget of the project. **SEE ATTACHED DOCUMENT -JANUARY 1, 2023 -DECEMBER 31, 2023 BUDGET EXHIBIT 2.**

- 2 Most recent fiscal year balance sheet and profit and loss accounting statement.
SEE ATTACHED EXHIBIT 3.

F. FINANCIAL GUARANTEES:

1. Provide of a copy of official minutes wherein the sponsoring organization approves the project and commits the organization to financial responsibility for carrying it out to the stage of completion contemplated in the application, should funding be approved.
MINUTES ATTACHED EXHIBIT 4.

G. PRIOR RECIPIENT'S REPORT (If you received prior ATAX funds): (Attach additional sheets, if needed):

WE RECEIVED ACCOMMODATIONS FUNDS FROM THE TOWN OF BLUFFTON IN OUR FISCAL YEAR 2011-2012 IN THE AMOUNT OF \$ 53,200.00; \$39,200 FOR 2012-2013 FISCAL YEAR; \$36,000 FOR 2013-2014 FISCAL YEAR AND \$48, 000 FOR THE FISCAL YEARS 2014-2015, 2015 -2016, 2016-2017, 2017-2018; \$25,000 FOR FISCAL YEARS 2018-2019, 2019-2020 AND 2020 - 2021; \$16,000 FOR 2021-2022.

- 1 How did you use the funds? **PROMOTION/ADVERTISING OF OLD TOWN BLUFFTON AND EVENTS IN OLD TOWN.**

2

What impact did this have on the community or benefit tourism?

The impact on the community is great. Merchants are showing a marked increase in tourist traffic throughout their stores, restaurants and galleries.

OUR ADVERTISING AND PROMOTION OF ART AND CULTURAL EVENTS HAVE GONE A LONG WAY TO HELP PUT OLD TOWN BLUFFTON ON THE MAP AS A SEPARATE ENTITY FROM HHI AND WILL CONTINUE TO DO SO. EVERYTHING WE DO IS DESIGNED TO BRAND OLD TOWN AS A FIRST CLASS, SOUTHERN HOSPITALITY EXPERIENCE, WORTHY OF EVERY LOWCOUNTRY TOURIST'S PLANS, TRULY THE HEART OF THE LOWCOUNTRY AND NOW A STATE DESIGNATED CULTURAL DISTRICT. THE UNBELIEVABLE GROWTH WE ARE WITNESSING IS A TRUE TESTIMONY TO OUR SUCCESS.

- Our maps are now distributed at most state welcome centers (2100 per printing), regional hotels and at the Savannah-Hilton Head Airport (1000 per month).
- Our Special Events have attracted over 1000 - 2000 people each time, many of whom are visitors to our area; 53 visitors/47 residents ratio. Results show more than 30 different states and Canada represented. The Art Walks alone are a huge success and have attracted 500 to 1000 visitors per gallery walk. Of these over 45% - 50% are from outside of Bluffton/Hilton Head area (All shops and galleries keep records).
- The previously held Spring Fling Weekend proved to be very successful and the zip code collection in all shops and galleries throughout the weekend gave stats of 50% visitors. We hope to continue to increase the number as the event grows.
- Our local merchants have reported increased sales due mostly to the tremendous increase in foot traffic this year AND ESPECIALLY FROM TOURISTS.
- The Heyward House stats collected from their guest registry also substantiates tourist increases.

See 2023 Marketing Plan (EXHIBIT 7)

- 3 Provide the previous two years and current year budgets.

See attached EXHIBITS 2, 5, 6.

Signature

Mary O'Neill
12/29/22

EXHIBIT 1



OTBMS EVENTS 2023

February 10, 2023 – Winter Artwalk

April 21 – 23, 2023 – Spring Fling Weekend

November 17, 2023 – Holiday Artwalk

November 30, 2023 – Sip & Shop

December 2023 - Holiday Weekend in Old Town
"Light up the Night", Friday, December 1
Christmas Parade, Saturday, December 2

OLD TOWN BLUFFTON MERCHANTS – 2023 BUDGET**EXHIBIT 2****Income****GRANT MONIES**

ATAX GRANT -	\$14,000.00
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REVENUE

MEMBERSHIP DUES REVENUE 50 MEMBERS @\$250.00	\$12,500.00
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WEB ADS	\$2000.00
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Total INCOME	\$28,500.00
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Expenses**ADVERTISING (PRINT & DIGITAL)**

4 MAJOR EVENTS (SEE EVENT SCHEDULE)	\$10,000.00
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GENERAL	\$6,000.00
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TOURIST MAPS (3 PRINTINGS @\$2000 EACH)	\$6000.00
GRAPHIC DESIGN FOR MAP 3 @\$200	\$600.00

Total ADVERTISING	\$22,600.00
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INSURANCE	\$2000.00
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PROFESSIONAL FEES (ACCOUNTING – TAX RETURN)	\$1600.00
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WEB HOSTING & UPDATING	\$1300.00
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Total EXPENSES	\$ 27,500.00
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OLD TOWN BLUFFTON MERCHANTS 2022 P & L**EXHIBIT 3****Income****GRANT MONIES**

ATAX GRANT (To Date)	\$7321.90
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REVENUE

MEMBERSHIP DUES REVENUE	\$8400.00
35 MEMBERS @\$250.00 paid to date	

Total INCOME	\$15,721.90
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Expenses**ADVERTISING (PRINT & DIGITAL)**

3 MAJOR EVENTS	\$6736.25
2 Artwalks and Spring Fling Weekend	

GENERAL	\$5703.00
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TOURIST MAPS	\$1049.40
GRAPHIC DESIGN FOR MAP \$160	\$160.00

Total ADVERTISING	\$13,648.65
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PROFESSIONAL FEES (ACCOUNTING – TAX RETURN)	\$1635.00
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WEB HOSTING	\$288.99
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Total EXPENSES	\$15,573.64
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EXHIBIT 4

Minutes from the Old Town Bluffton Merchants Society Board of Directors Meeting

December 7, 2022

Present: Mary O'Neill, Ben Whiteside, Mike Tripka, Leslie Rohland, Lynn Ruocco

Call to Order

President Ben called the meeting to order at 5:30 pm.

Treasurer's Report

Mary gave financial report. She presented a revised 2022 Budget and ATAX submission.

Board approved budget and ATAX.

Membership Report

All current members paid; 3 new members included; 3 out of business or moved out of Old Town.

Next board meeting and general meeting TBD. Winter Artwalk is set for February 10, 2023.

Meeting adjourned at 7:00pm.

OLD TOWN BLUFFTON MERCHANTS 2020 – 2021 BUDGET**EXHIBIT 5****Income****GRANT MONIES**

ATAX GRANT -	\$25,000.00
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REVENUE

MEMBERSHIP DUES REVENUE	\$11,250.00
45 MEMBERS @\$250.00	

WEBSITE ADS @200.00 EA FOR 4 PER MONTH	\$9600.00
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Total REVENUE FROM OTBM	\$20,850.00
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Total INCOME	\$45,850.00
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Expenses**ADVERTISING (PRINT & DIGITAL)**

4 MAJOR EVENTS	\$15,000.00
(SEE EVENT SCHEDULE)	

GENERAL	\$12,000.00
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TOURIST MAPS (4 PRINTINGS @\$1700 EACH)	\$6800.00
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GRAPHIC DESIGN FOR MAP 4 @\$300	\$1200.00
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VIDEO PRODUCTION	\$1000.00
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SOCIAL MEDIA PAID ADS	\$2100.00
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Total ADVERTISING	\$38,100.00
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OTHER (LUMINARY SUPPLIES, TROLLEY, PRINTING)	\$1000.00
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GENERAL MEETING (9 @\$50.00 EACH)	\$450.00
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INSURANCE	\$4500.00
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PROFESSIONAL FEES (ACCOUNTING – TAX RETURN)	\$1000.00
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WEB HOSTING	\$150.00
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Total EXPENSES	\$45,200.00
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OLD TOWN BLUFFTON MERCHANTS 2021 – 2022 BUDGET**EXHIBIT 6****Income****GRANT MONIES**

ATAX GRANT -

\$16,000.00

REVENUEMEMBERSHIP DUES REVENUE
50 MEMBERS @\$250.00

\$12,500.00

WEBSITE ADS @100.00 EA FOR 4 PER MONTH

\$4800.00

Total REVENUE FROM OTBM

\$17,300.00

Total INCOME

\$33,300.00

Expenses**ADVERTISING (PRINT & DIGITAL)**4 MAJOR EVENTS
(SEE EVENT SCHEDULE)

\$12,000.00

GENERAL

\$6,000.00

TOURIST MAPS (3 PRINTINGS @\$2000 EACH)
GRAPHIC DESIGN FOR MAP 3 @\$300

\$6000.00

\$900.00

VIDEO PRODUCTION

\$1000.00

SOCIAL MEDIA PAID ADS

\$1000.00

Total ADVERTISING

\$26,900.00

GENERAL MEETING (TBD @\$50.00 EACH)

TBD

INSURANCE

\$2000.00

PROFESSIONAL FEES (ACCOUNTING – TAX RETURN)

\$2000.00

WEB HOSTING

\$1800.00

Total EXPENSES

\$32,700.00

EXHIBIT 7**OTBM MARKETING PLAN 2023**

ADVERTISING/ MARKETING BUDGET	2023	\$23,600.00
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EVENT MARKETING (4 MAJOR ART CENTRIC EVENTS) BUDGET	\$10,000.00
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All 4 events will be advertised in local newspapers and magazines, in the Carolina Arts publication, as well as digitally to out of town visitors and through eblasts to our list of out of town visitors.

GENERAL ADVERTISING	\$6000.00
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(Includes Chamber Vacation Planner print ad and digital component along with South Magazine print and digital)

TOURIST MAPS (3 PRINTINGS @\$2000 EACH)	\$6000.00
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GRAPHIC DESIGN FOR MAP 3 @\$200	\$600.00
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WEBSITE UPDATE	\$1000.00
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INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI OH 45201

DEPARTMENT OF THE TREASURY

Date: **MAY 20 2006**

BLUFFTON OLD TOWN MERCHANTS
SOCIETY
PO BOX 2416
BLUFFTON SC 29910

Employer Identification Number:
01 0060544

ELIN.

17031101001024

Contact Person:

GARY PUTNEY

100 31513

Contact Telephone Number:

(877) 834-5500

Accounting Period Ending

December 31

Form 990 Required:

Effective Date of Exemption:

November 11, 1999

Contribution Deductibility:

100

Dear Applicant:

We are pleased to inform you that upon review of your application for tax-exempt status we have determined that you are exempt from Federal income tax under section 501(c)(6) of the Internal Revenue Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Please see enclosed information for Organizations Exempt Under Sections Other Than 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Enclosure Information for Organizations Exempt Under Sections Other Than 501(c)(3)

Letter 940 (03/03)