

Milroy, Shannon

From: noreply@civicplus.com
Sent: Monday, July 1, 2024 4:59 PM
To: ATax Communications
Subject: Online Form Submittal: Accommodations Tax Grant Application

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Accommodations Tax Grant Application

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Accommodations Tax Grant Application Instructions	Accommodations Tax Grant Application Instructions
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Accommodations Tax Grant Application Instructions	I have read and acknowledged the Town of Bluffton, SC Accommodations Tax Grant Application Instructions.
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(Section Break)

Application Date	7/1/2024
Full Legal Organization Name	Historic Bluffton Foundation
Project Name	Q2 Budget FY 2025
Total Project Costs	150,000.00
Total ATAX Funds Requested	40,000.00
Percent of Total Budget	26%
Address	70 Boundary Street

Street Address Line 2	<i>Field not completed.</i>
City	Bluffton
State	South Carolina
Zip Code	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.	HBF-IRS (2).pdf
Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants.	Report Permit53301_638499793001377180.pdf

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Organization Primary Point of Contact	
First Name	Robert
Last Name	Jones
Title	Executive Director
Phone Number	8437576293 ext. 1
E-mail Address	robert@historicbluffton.org

(Section Break)

Organization Secondary Point of Contact	
First Name	Nicki
Last Name	Graziani
Title	Administrator
Phone Number	8437576293 ext. 2

E-mail Address Nicki@HistoricBluffton.org

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description:

Since its establishment in 1981, The Historic Bluffton Foundation has remained steadfast in its commitment to safeguarding the rich history and cultural heritage of the Town of Bluffton, South Carolina, and its surrounding areas. Our mission encompasses education, marketing, hands-on preservation efforts for buildings and sites, the upkeep of the Caldwell Archives, and the operation of the renowned Heyward House Museum and Welcome Center.

The Foundation has made significant strides in advancing its vision as the foremost authority and advocate for historical preservation in Bluffton and southern Beaufort County. Building upon our legacy, we continue to serve as local pioneers in recognizing the pivotal role of historic preservation in fostering a sustainable tourism industry. Our endeavors not only enrich the cultural fabric of our community, but also stimulate economic growth by supporting local businesses and restaurants.

Through the support of members, grants, A Tax and event revenue, The HBF has been able to sustain and enhance the operations of the Heyward House as a house museum and Bluffton's premiere welcome center. These funds support personnel, utilities, maintenance of the property, marketing initiatives, public events, and visitor outreach programs.

As a house museum has proudly held its place as a cornerstone attraction, inviting visitors and residents alike to delve into the rich tapestry of the region's vibrant history and culture. It is one of the only remaining historical houses sitting on original property with original structures. This iconic building stands as a symbol of utmost importance to our town, resonating with tangible and intangible significance.

In addition to our museum's cultural contributions, our grounds are actively utilized for events spilling over from Martin Family Park, such as the Farmers Market and Fourth of July celebration, further embedding ourselves in the community fabric. By supporting local vendors and artisans at events and in our gift shop, we celebrate the region's agricultural heritage, economic growth, and community cohesion. Our ongoing efforts to champion local businesses, restaurants, and events extend far beyond mere promotion; they serve as integral components in fostering economic vitality of Bluffton and its surrounding areas. By cultivating a vibrant cultural scene and

building a sense of community pride, the Heyward House Museum and Welcome Center plays a pivotal role in shaping the socio-economic landscape of our town and ensure a thriving future for generations to come.

As the Welcome Center of Bluffton for a quarter of a century, we showcase the diverse offerings of Bluffton. Including tours of the house and surrounding Old Town by golf cart or by foot, culinary experiences, art galleries, and outdoor recreational activities. Our collaborations with local businesses and organizations have solidified The Heyward House as the starting point for exploring Bluffton and the surrounding areas.

The HBF embarked on a series of significant capital improvement projects at Heyward House. Starting in March of 2023, we utilized restricted funds from the South Carolina legislature grant, administered by the South Carolina Department of Parks, Recreation, and Tourism (SC-PRT). This funded essential enhancements, increasing the venue's utility for various events and activities, while also aiding in the ongoing preservation efforts of the site. The HBF's board envisions these projects as pivotal steps toward achieving self-sufficiency. Particularly as preparations are made for the anticipated relocation on the Welcome Center in 2025. To ensure long term sustainability, The HBF is formulating a comprehensive strategy, with event rentals serving as a central component.

On-going future projects for FY 2025 and beyond, also supported by SC-PRT grant funds include:

Partition Wall Project - Restore dining room wall to it's pre-1970's state and add a new built-in display case.

Replacement of new aggregate throughout the common grounds area

Repair Heyward House front Porch (structural)

Interior painting on the first floor, including lead paint abatement

Addition of a new bathroom facility across from the current one

Installation of a water feature in the front yard near the new sidewalk

Major structural repairs to address identified issues and ensure the integrity and safety of the house. Completed with the assistance of Bennett Preservation Engineering of Charleston SC.

Exterior Lighting upgrade to enhance safety and aesthetics.

Planning and installation of a living fence at the rear of the property

Install retractable awning on gazebo for shade, comfort, and

rain.

The HBF has taken steps to hire both a landscape architect and architect to develop a comprehensive design for the site. This will focus on optimizing the property for rentals, repurposing the summer kitchen as a catering kitchen, redesign the front yard to accommodate changes resulting from the sidewalk and powerline projects, and provide more covered space. The rental of the facility is essential to it's survival. These improvements will enhance its appeal and functionality, contributing to it's long-term viability. The HH/WC is working to position itself as a premiere event venue for a variety of occasions. Our marketing efforts are focused on showcasing this goal with active and strategic marketing on wedding sites such as The knot. By strategically advertising, we are expanding our reach to a discernable clientele.

Garvin Garvey Info

A memorandum of agreement (MOA 2017-69) was established between The HBF and The Town of Bluffton, further expanding the foundation's services, including interpretive programming at GG house. Starting October 2017, The HBF began offering tours of GG house as well as providing staff and volunteers. During fiscal year 2018/2019, 1,335 guests visited. FY 2019/2020 had 2,115 visitors. From March 2023 - March 2024 the site welcomed 2,275 visitors. This shows exponential interest and growth in historic sites over time. Funding to support this initiative is provided by the Town of Bluffton in the form of reimbursement. Head interpreter at GG, Ross Patterson, demonstrates exceptional skill in coordinating schedules to maintain operations as well as create a nemoral environment. Additionally, the presence of trained interpreters and volunteers enhances the visitor experience and plays a crucial role in protecting the site from vandalism.

Caldwell Archives

We are continuing the digitization project after the passing of Mrs. Bauman, who was leading this project. This project is significant in providing research to Town and Foundation staff, as well as the public. Access to this facility remains free of charge to the Town of Bluffton, further strengthening our collaborative efforts.

Arts/Cultural Projects

Monthly living historians every 1st Thursday

Luke Peeples Celebration Concert

Shades of Succession - two day living history event with SCAR

Scottish Heritage Days II
Fall Lecture Series

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:

In 2023/2024 HH/WC served a total of 18,550 visitors. Of these, 9,715 came for tours or information. We captured location info from 8,300 people, of which 7,250 were "tourists" representing 87% of our impact visitors based on captured data. Rentals accounted for 48% of total visits, with remaining visitors staying at timeshares (18%) and hotels (20%). The remaining visitors were categorized as "other" for business, archives, events and rentals. The number of visits in recent months shows a strong resurgence of tourism and historical interest.

44% of visitors learned about us through word of mouth, 28% from web/internet, 14% from signage, and 12% through print media. The remaining 2% found us through other means. Stocked Welcome Center racks are housed here, with info and maps as well as sending HH/WC brochures out to other SC welcome centers, as well as hotels, SAV airport, The Gullah Geechee Museum, both chambers of commerce, Beaufort chamber and other historic sites in the region. A knowledgeable attendant in the HH gift shop greets guests, provides recommendations, answer questions, as well as book tours. Personal communication and engagement are fundamental in providing welcome center and community services. After the relocation of the welcome center, we still plan on offering this information. The house is the primary historical attraction of Bluffton and a beacon for cultural and historical enthusiasts. In addition to tours and exhibits HH actively promotes local businesses, lodgings and restaurants.

As one of the last small house museums, HH holds cultural value for the Lowcountry. Commercial establishments have dominated the landscape recently. HH stands as a symbol of heritage and tradition, offering a place for locals to connect with each other and our rich history.

“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.

(Section Break)

Project/Event Start & End Date: 10/1/2024 - 12/31/2024

Multi-Year Project/Event? No

Permits Required, if any: Building permit for bathroom acquired. Special events permits as needed

Additional Comments: *Field not completed.*

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

Project/Event Line Item Budget [DRAFT HBF Budget 2023 2024 with Wel Ctr .pdf](#)

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement [Historic Bluffton Foundation April 2024 YTD Balance Sheet.pdf](#)

Financial Guarantee [2024-05-20-HBF-directors-report.pdf](#)

Applicant must provide 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.

(Section Break)

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	Donations, gifts, contributions
Amount/Value	23,000
Contribution	Volunteer time, in kind grounds
Amount/Value	23,400

(Section Break)

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	SC PRT
Amount	248,600
Funding Source	<i>Field not completed.</i>
Amount	<i>Field not completed.</i>
Funding Source	<i>Field not completed.</i>
Amount	<i>Field not completed.</i>
Funding Source	<i>Field not completed.</i>
Amount	<i>Field not completed.</i>

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	Welcome Center
Year	2023
Amount Awarded	150,000
Was project completed?	Yes
How were the funds used?	As stated in Q1 application
What impact did this project/event have on the community or benefit tourism? Describe how the tourism data was measured.	The substantial increases in engagement and visits underscores the significant and growing interest in our cultural offerings and highlights the cultural appeal of these landmarks. The influx of visitors contributes to the local economy by supporting small businesses, restaurants, lodgings, and activities. The HH attracts visitors from across the country as well as at GG.

(Section Break)

Please provide the project/event budgets for the previous two (2) years.	Historic Bluffton Foundation Budget 2024_2025 .pdf
Additional Comments	<i>Field not completed.</i>

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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.

Signature	Nicole E Graziani
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Signatory's Title or Position	Administrator
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**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, 1982
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.

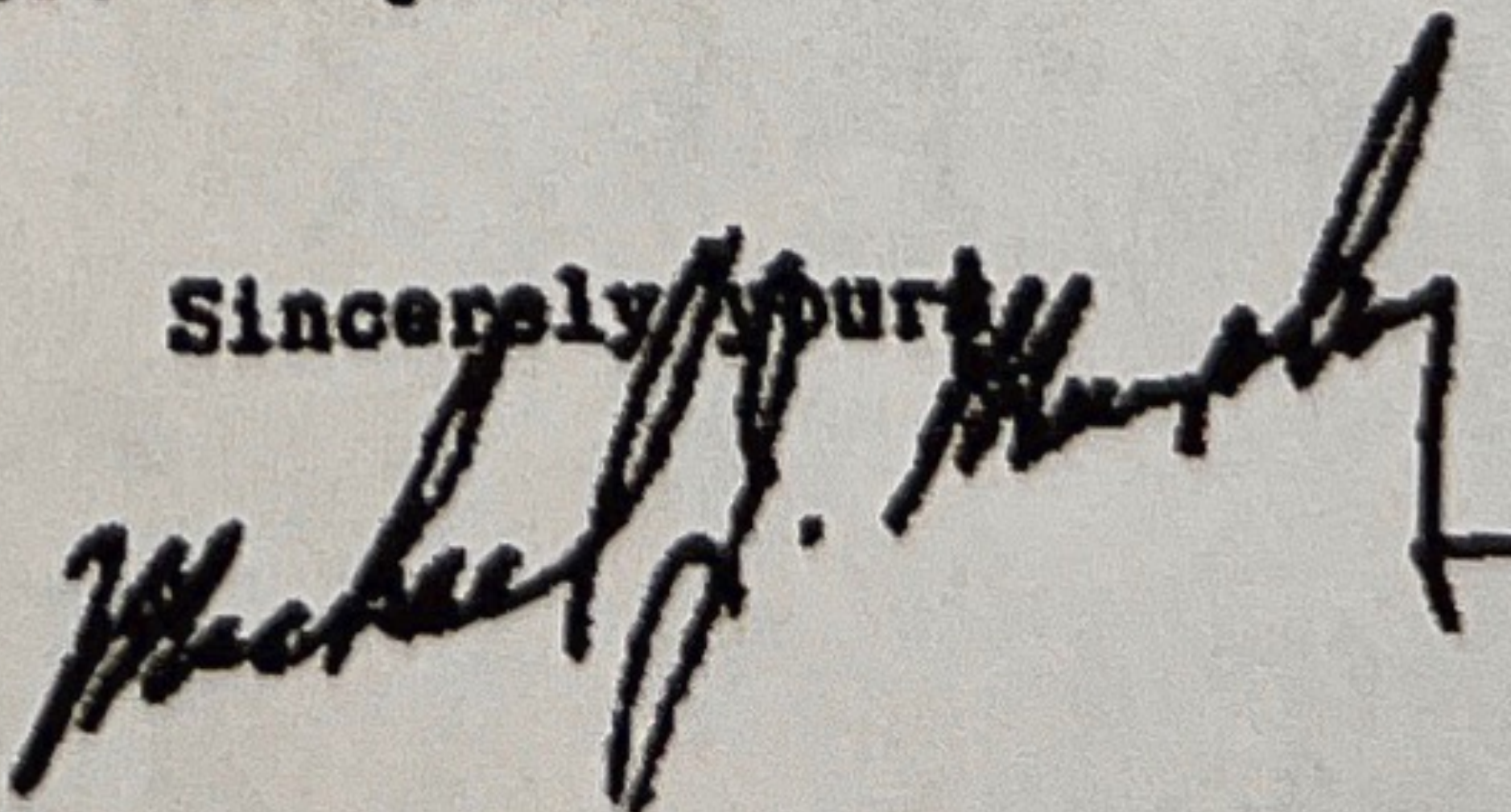
Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section _____. Your exempt status under section 501(c)(3) of the code is still in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

TOWN OF BLUFFTON -

Expires: 04/30/2025

License No. 24-04-2445
04/29/2024

NAICS Title: Museums

Business Type:

BLUFFTON WELCOME CENTER

Business Name:

Bluffton Historic
Preservation Society,
Inc

**Business DBA
Name:**

Heyward House
Museum and
Welcome Center

Physical Address:

70 BOUNDARY ST
BLUFFTON SC 29910

NON-TRANSFERABLE | TO BE PLACED IN A CONSPICUOUS PLACE

Section 6-21 Purpose and Duration of Business License

ALL BUSINESSES LOCATED IN THE TOWN OF BLUFFTON MUST POST THE BUSINESS LICENSE IN A VISIBLE LOCATION WITHIN THE BUSINESS LOCATION AS REFERENCED ABOVE AND IS VALID FOR THIS LOCATION ONLY. ALL BUSINESSES LOCATED OUTSIDE THE TOWN OF BLUFFTON MUST KEEP A CURRENT COPY WHILE CONDUCTING BUSINESS INSIDE THE TOWN OF BLUFFTON. CHANGE IN LOCATION OR OWNERSHIP REQUIRES A NEW LICENSE. IF THE BUSINESS IS CLOSED, CONTACT OUR OFFICE AT 843-706-4501 TO UPDATE ACCOUNT.

Ann Londeau
Ann Londeau
1321 May River Rd
Bluffton, SC 29910

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

2023-24 Budget			
Welcome			
	Total	Center	HBF
	Budget	Only	Only
	Budget	Budget	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

Balance Sheet As of April 30, 2024

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Atlantic Community Operating	0.00
Coastal States # 6767 Operating	11,234.75
Coastal States #2674 - MM	101,924.68
Coastal States #7294- Archives	1,402.42
Coastal States #7856 Restricted	0.00
Petty Cash	400.00
PSB Specified Donation Account	4,964.00
United Community Bank	470,478.21
Total Bank Accounts	\$590,404.06
Accounts Receivable	
Pledges Receivable	0.00
Total Accounts Receivable	\$0.00
Other Current Assets	
Inventory	12,500.00
Promises to Give	69,111.48
Undeposited Funds	0.00
Utility Deposits	475.38
Total Other Current Assets	\$82,086.86
Total Current Assets	\$672,490.92
Fixed Assets	
Accumulated Depreciation	-24,098.21
Computer Equipment	8,053.61
Computer Software	0.00
Deposits on Fixed Assets	0.00
Equipment A/C	10,750.00
Furniture, Fixtures & Equipment	54,681.81
Property - Heyward House	300,000.00
Common Ground	55,174.68
Construction in Progress HH	0.00
Renovations - Heyward House	257,015.57
Total Property - Heyward House	612,190.25
Vehicles - Golf Cart	12,595.00
Vehicles - Truck	5,000.00
Total Fixed Assets	\$679,172.46
Other Assets	
Restricted Asset - Bathroom	0.00
Restricted Asset - Teel House	338,889.40

Historic Bluffton Foundation

Balance Sheet As of April 30, 2024

	TOTAL
Restricted Assets	
Temporarily Restricted	-3,500.00
Due from Big Book Account	3,500.00
Total Temporarily Restricted	0.00
Total Restricted Assets	0.00
Total Other Assets	\$338,889.40
TOTAL ASSETS	\$1,690,552.78
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	18,229.17
Total Accounts Payable	\$18,229.17
Other Current Liabilities	
Deposits 2009 Budget	0.00
Direct Deposit Liabilities	-5,307.20
Note Payable - Line of Credit	0.00
Payroll Liabilities	3,005.49
Rent Received in Advance	0.00
Sales Tax Payable	0.00
SC Dept of Revenue Payable	-40.79
Sales Tax Payable	40.79
Total SC Dept of Revenue Payable	0.00
Total Other Current Liabilities	\$ -2,301.71
Total Current Liabilities	\$15,927.46
Long-Term Liabilities	
N/P SBA Loan	83,837.78
N/P South Atlantic Bank	0.00
Total Long-Term Liabilities	\$83,837.78
Total Liabilities	\$99,765.24
Equity	
Net Assets	
Net Assets W/O Donor Restricti	756,863.47
Net Assets Permanently Restrict	0.00
Net Assets Temp Restricted	0.00
Net Assets Unrestricted	0.00
Net Assets W Donnor Restriction	927,716.75
Total Net Assets	1,684,580.22
Opening Bal Equity surplus	0.00
Retained Earnings	-121.75

Historic Bluffton Foundation

Balance Sheet
As of April 30, 2024

	TOTAL
Temporarily Restricted Equity	-3,500.00
Due to Big Book Account	3,500.00
Total Temporarily Restricted Equity	0.00
Net Income	-93,670.93
Total Equity	\$1,590,787.54
TOTAL LIABILITIES AND EQUITY	\$1,690,552.78



**Historic Bluffton Foundation
Heyward House Museum & Welcome Center
May 20, 2024 Executive Directors' Report**

Board – Staff – Volunteers

- The Foundation currently has 10 active volunteer docents/interpreters and 2 in the archives. With a heavy heart, I am sad to announce the passing of Marilyn Oesterling, one of our long time docents passed two weekends ago. We have purchased several trees in her name and her memorial service will be held on June 14 at 2:00 PM at New Bluffton Worship on Persimmon St.
- Our current board members are: Jen Sommerville (President), Susan Wetmore (Vice President), John Sulka (Treasurer), Katie Epps (Secretary), Paul Tollefson, Bruce Trimbur, Sylvia Coker, Joanie Heyward, David Pratt, and Roberts Vaux. Melanie Marks has resigned from her board seat as she and her husband are moving to Florida.
- Historic Bluffton Foundation currently has 3 full-time employees including: Robert Jones ED, and Victoria LaBar- Gift Shop/Tour Coordinator, and new administrator, Nicki Graziani. We currently have 5 part-time employees, 2 who works both at the Heyward House and the Garvin Garvey House. Sunny Rogers and Ross fill in for Victoria at the Heyward House and are trained to operate the Garvin Garvey house as well.
 - Ross Patterson - Interpreter/Garvin Garvey lead /fills in for Victoria at the Heyward House/paid walking tours.

- Barry Kaufman: Garvin Garvey, interpreter. Barry used to be a central cog at Bluffton Today and is now a writer for local magazines.

Executive Summary

This is a big week for us with all that is happening: The following is a run down of what's going on:

- Monday - Board mtg. 4:30 PM
- Tuesday - Clay will give his performance at 5:00 PM at the Methodist Church. ATAX meeting at 5:30 too that Nicki will be at.
- Wednesday - Clay will be doing afternoon cuttings.
- Thursday - Historic Preservation Symposium is at 5:30 which will be a meet and greet (I'll have member brochures out) and then lecture by Glen about the post offices at 6:00 and then there will be hors d'oeuvres at the Heyward House by Chef Danny Hieronymous immediately after unless it rains (\$2,300). If it rains, Joanie's house is the location. We still haven't received any sponsorship monies for the food. Burnt Church Distillery has donated wine.
- Saturday - Victoria is getting married at the Heyward House.

1. Finance/Grants/Compliance

- Purchased Quickbooks Online the second week of May and will hopefully be able to sit down with Ann this or next week to migrate the data over to the online version.
- SC PRT grant: I haven't been able to meet with Ann to get a full tabulation of what has been spent this quarter but will do so and send you all a separate update with that info.

- ATAX: I am working on April's spreadsheet to help speed things up and am putting together the various reports that are required with each submittal now.
- 67/8 Chevy farm truck- The deal I had with Joe Green fell through but was able to sell it for \$200 to our carpenter.
- I was asked to quickly put together a request for funding through Bill's office in Columbia a couple of weeks ago. Evidently we will receive some funding through this legislative grant initiative. I've asked for funds to be used for an education initiative, the repair work on the Heyward House and cultural programming.
- Bricks on Boundary is starting up again with the release of the Spring newsletter. I raised brick prices slightly for individuals and businesses.
- Postcard and Notecard Project: Doug Corkern granted the Foundation exclusive



rights to use the scanned artwork he provided several years ago. I am currently developing this artwork into a notecard series and a postcard series. These items will be available for sale in our gift shop and on our website. Additionally, we can offer them

wholesale to local businesses interested in carrying our products. Like the maps, these could be good sources of income.

2. Colcock-Teel House:

The Teel House is doing okay but needs landscaping again and I'm working on getting this handled for around \$400 with the landscaper who did it previous.



3. Heyward House CIP Projects:

- Craig Bennett Engineering: Craig has been out of town but we will get moving with him after Memorial Day holiday.
- Summer kitchen roof repair: A final report was submitted to the County two weeks ago. This report shows that we received \$31,044 and spent \$20,774.46. The remainder is \$10,269.54. I haven't heard yet whether they will be wanting the remainder back.
- Partition/Curtain Wall, bathroom project, built-in-display case, little library project:, The wall is complete and requires painting. The bathroom drawings are apparently with an engineer right now waiting being signed off on. After the holiday Chad will be working on the rest of the projects such as finishing the service yard, installing little library, and building the display case. (Our old display case is being donated to

4. Education Outreach preservation projects/initiatives:

- Historic Churches and Congregation Map of Bluffton- Ongoing - I've started working on the design and verbiage for this new map.
- Contributing Structures Signage Project- Ongoing
- Lecture Series: Clay Rice event will be this Tuesday and Wednesday. I am working on a Fall one right now and have already recruited a couple of speakers.
- Shades of Secession: Ongoing -set for mid November 2024. Collaboration with SCAR.
- Luke Peeple's Celebration of Music and Life: ongoing- Staff is working with Sylvia on this project

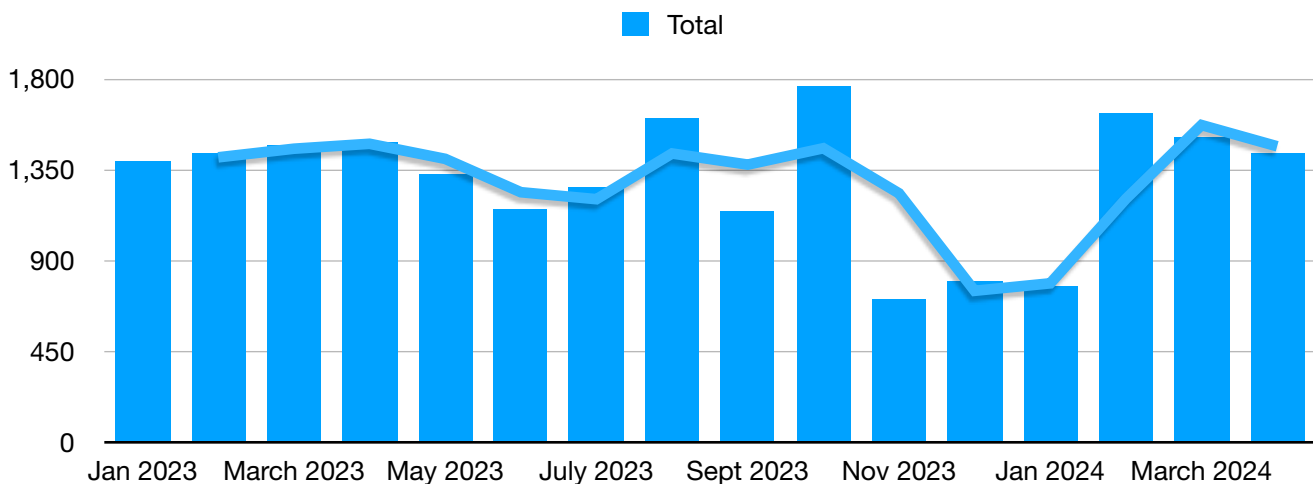
5. General Maintenance at Heyward House

- A soft wash was accomplished in the last week.

- The shutters and doors on the summer kitchen need to be painted. A preventative treatment was applied to its roof as well as to the roof of the slave cabin.

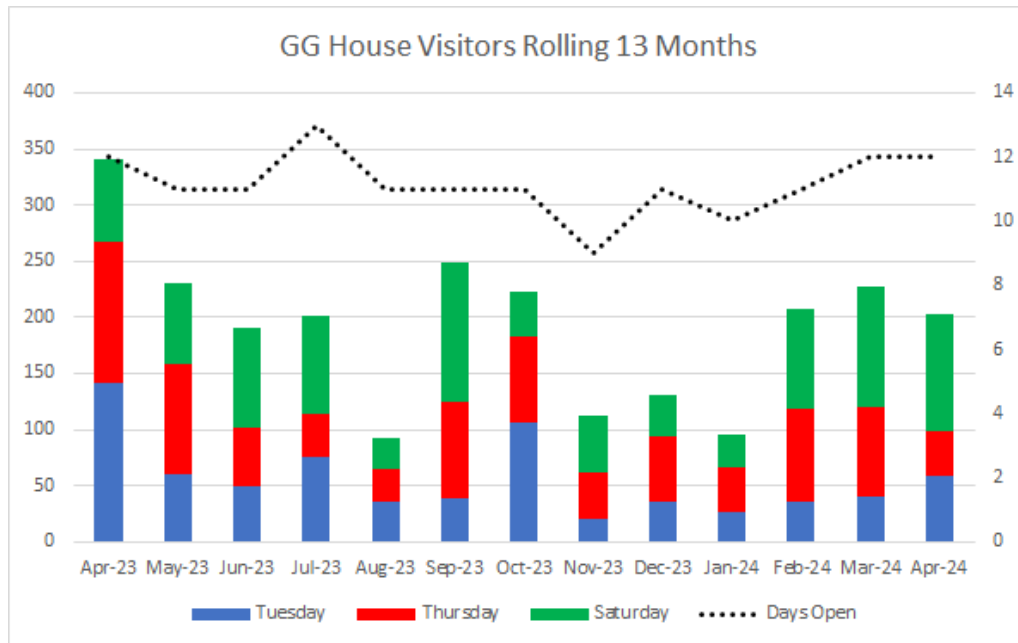
6. Heyward House /Garvin Garvey Visitor Recon

- **Heyward House Visitors:** Number slightly decreased in April to 1425 total visitors
The breakdown is 271 in tours, 654 for info, and 500 for events . Visitation is down at many area sites which is apparent in a museum forum I am on.
- A Docent luncheon was held on May 5 at Truffles in their honor. It was a good opportunity to get all the docents together at the same time and get to know them.
- **Garvin Garvey Visitors:** (See chart below) Maintenance concerns have been turned over to Glen at the Town.



8. **Caldwell Archives progress:** Nothing of consequence to report at this time.

Heyward House Museum and Welcome Center Stats:



STORIES & SONG WITH CLAY RICE

May 21st 5pm - 7pm - Bluffton United Methodist Church

Clay is a world renowned artist, songwriter and author of children's books. His lecture will be based on storytelling with music (he will have his guitar). Clay says he "wants it to feel like he is sitting in one's living room."

Free to attend

9TH ANNUAL

HISTORIC PRESERVATION SYMPOSIUM

Hosted by the Town of Bluffton

**“THE OLD POST OFFICE:
REHABILITATING AN ICONIC
BLUFFTON LANDMARK”**

MAY 23, 2024

HENRY "EMMETT" MCCrackEN JR. COUNCIL CHAMBERS
LOCATED AT TOWN HALL
(20 BRIDGE STREET)

<u>MEET AND GREET</u>	<u>SYMPOSIUM</u>
5:30PM	6 PM - 7 PM
LOCAL HISTORIC PRESERVATION ORGANIZATIONS	PRESENTATION BY GLEN UMBERGER, HISTORIC PRESERVATIONIST, TOWN OF BLUFFTON, AND INTERVIEW WITH DEBBIE WUNDER, OWNER OF 41 BRIDGE STREET.

RECEPTION TO FOLLOW

The Heyward House Museum & Welcome Center
70 Boundary Street

The event is free and open to the public.

PRESERVATION MONTH
PEOPLE SAVING PLACES

Contact: Glen Umberger (phone: 843-706-4500)

Historic Bluffton Foundation						
Operational Budget						
Fiscal Year 2024-25						
				2024-25 Budget		
					Welcome	
					Center	HBF
				Total	Only	Only
				Budget	Budget	Budget
Revenues						
	Grants					
	Private Foundations			10,000		10,000
	SC Parks Grant			248,600	124,300	124,300
	Town of Bluffton ATAX			170,000	170,000	
	Beaufort County ATAX			13,000	13,000	
	Total Grant Income			441,600	307,300	134,300
	Sales and Service Revenues					
	Gift Shop			12,000		12,000
	Memberships			50,000		50,000
	Tours/Programs			17,000	15,000	2,000
	Special Events			10,000		10,000
	Total Sales & Service			89,000	15,000	74,000
	Other Revenues					
	Interest Income			21,000		21,000
	Donations			23,000	5,000	18,000
	Rental Income/Common Ground/Caretaker			25,000	15,000	10,000
	Total Miscellaneous			69,000	20,000	49,000
Total Revenues				599,600	342,300	257,300
Expenditures and Other Uses						
	Salaries & Benefits			184,000	131,200	52,800
	Interest Expenses			2,300		2,300
	Archives			2,000		2,000
	Bank Fees			3,500	3,000	500
	Insurance			26,000	22,000	4,000
	Utilities			17,000	15,000	2,000
	Gift Shop Expenses			8,000		8,000
	Special Events			10,000		10,000
	Programs			3,000	1,500	1,500
	Advertising and Marketing			12,000	6,000	6,000
	Shipping/Postage			1,500	1,300	200
	Dues & Subscriptions			3,000	1,000	2,000
	Office Supplies			7,000	5,800	1,200
	Equipment Upgrades			5,000		5,000
	Professional Development			1,200		1,200
	Contract Services					
	Accounting/Consulting			23,000	19,000	4,000
	Cleaning Services			2,700	2,300	400
	Landscaping			15,000	7,500	7,500
	Pest Control			700	600	100
	Repairs/Maintenance			20,300		20,300
	Security			1,800		1,800
	Website			2,000	1,800	200
	Capital Improvements			248,600	124,300	124,300
Total Expenditures and Other Uses				599,600	342,300	257,300

CIP Projects FY 2025

Living Fence -rear of property	\$5000.00
lead paint abatement and painting of first floor of house	\$30000.00
Exterior lighting repair/addition	\$5000.00
Pavilion	\$50000.00
Landscape and Pavilion planning	\$10000.00
New aggregate for Common Ground	\$10000.00
Summer kitchen/catering kitchen design	\$14300.00
Total	\$124300.00

Heyward House Structural Repairs

Structural Drawings and Bid Ready Plans	\$15000.00
Structural repairs. (Big question mark)	\$109300.00
Total	\$124300.00