

## TOWN COUNCIL

### STAFF REPORT

#### Finance & Administration Department



<b>MEETING DATE:</b>	June 8, 2021
<b>PROJECT:</b>	Formal Items: Consideration of Accommodations Tax Advisory Committee Funding Recommendations for Quarter Ending March 31, 2021.
<b>PROJECT MANAGER:</b>	Natalie Majorkiewicz, CGFO, Treasury Manager

#### RECOMMENDATION:

In accordance with the grant process, the Accommodations Tax Advisory Committee (ATAC) held a meeting on May 18, 2021 to review the budget and marketing plan (MP) in accordance with the DMO contract and quarterly grant applications. The committee has made the following grant award recommendations for Town Council's consideration:

Requesting Organization	Amount Requested	Amount Recommended
<b>Hilton Head Island-Bluffton Chamber of Commerce (DMO):</b> FY2022 Budget and Marketing Plan (MP)	\$ 230,000	\$ 230,000
<b>Bluffton MLK Observance Committee:</b> Bluffton Juneteenth Celebration	27,500	27,500
<b>Historic Bluffton Foundation (HBF):</b> Welcome Center at the Heyward House	169,000	169,000
<b>Society of Bluffton Artists (SoBA):</b> Promoting the Arts in the Lowcountry and Beyond	18,200	18,200
<b>Total for the Quarter</b>	<b>\$ 444,700</b>	<b>\$ 444,700</b>

#### BACKGROUND/DISCUSSION:

##### **Funds Currently Available for Distribution:**

Total State and Local Accommodations Tax funds currently available for distribution are \$1,488,053 as outlined in the following chart:

<b>State ATAX</b>		<b>Local ATAX</b>	
Remaining from Previous Qtr.	\$ 169,432	Remaining from Previous Qtr.	\$ 1,106,744
3 <sup>rd</sup> Quarter Revenue	131,863	3 <sup>rd</sup> Quarter Revenue	282,946
First \$25k to General Fund*	N/A	51% to Town of Bluffton CIP	(131,315)
5% to General Fund	(6,593)	Disaster Recovery Designation	(2,829)
30% to DMO	(39,559)	8% to DMO	(22,636)
<b>Total State ATAX Funds Remaining for Distribution</b>	<b>\$ 255,143</b>	<b>Total Local ATAX Funds Remaining for Distribution</b>	<b>\$ 1,232,910</b>

\* First \$25k taken in 1<sup>st</sup> Quarter of Fiscal Year and Not Applicable to the remaining quarters.

When comparing the State and Local Accommodations Tax collections for the quarter ending March 2021 to the same quarter of last year, revenues are up \$221,372 or 114%. This is largely due to the payment deadline extension to June 14, 2020 for tax periods due the 20<sup>th</sup> of March and April 2020.

#### **Funds Requested for Distribution:**

##### **☐ Designated Marketing Organization Budget and Marketing Plan for FY2022.**

- As part of contract 2019-33 that began on July 1, 2019, the Hilton Head Island-Bluffton Chamber of Commerce proposed a fiscal year 2022 budget of \$230,000 for the Town of Bluffton.
- S.C. Code of Laws Sec. 6-4-10-(3) requires the Town's DMO to manage and direct 30% of the balance of State accommodations tax funds.
- Per Town of Bluffton Code of Ordinances, Sec. 24-26(b), *"the Town may set aside an amount not to exceed eight percent (8%) of Local Accommodations Tax revenue for the Designated Marketing Organization."*
- FY2022 will be the third year of the up to three-year term of the contract.

Below is a comparison between the FY2021 original and revised with the FY2022 proposed budget:

<b>Bluffton Marketing Strategies and Programs</b>	<b>FY2021 Original</b>	<b>FY2021 Amended</b>	<b>FY2022 Proposed</b>	<b>% Increase/ (Decrease)</b>
SEO/Social Media (Organic):	\$ 15,000	\$ 15,000	\$ 18,900	26%
Digital Promotions:	20,150	31,600	45,000	42%
Media Management & Reporting:	-	-	5,265	N/A
Website & Campaign Maintenance:	7,500	26,000	14,310	(45%)
Bluffton Insiders (enews):	-	-	4,860	N/A
Bluffton Vacation Planner:	-	32,000	22,500	(30%)
Regional Vacation Planner:	-	12,000	12,165	1%
Group Tour:	-	-	900	N/A
Collateral and Fulfillment:	4,300	-	-	N/A
Photography/Videography:	-	-	12,000	0%
Cooperative Partnership:	-	2,000	-	(100%)
Budgeted Research Programs:	2,250	10,000	4,500	(55%)
Contingency:	-	10,000	4,500	(55%)
Destination Marketing Operations & Management:	32,800	81,400	85,100	5%
<b>Total:</b>	<b>\$ 82,000</b>	<b>\$ 220,000</b>	<b>\$ 230,000</b>	<b>5%</b>

**The committee voted to recommend the Hilton Head Island-Bluffton Chamber of Commerce's Town of Bluffton DMO budget and marketing plan for FY2022.**

##### **☐ Bluffton MLK Observation Committee requested \$27,500 to support advertising and promotion of tourism, facilities for civic and cultural events, municipality services, and tourist transportation for Bluffton Juneteenth Celebration, with ATAC recommending \$27,500.**

- This event is scheduled to be held June 19 & 20, 2021 at the Burnt Church Distillery.
- The project is aiming to bring overnight guests to the event with the additional day added.
- Eligible "tourism-related expenditures" include:
  - "Advertising and promotion of tourism" is budgeted at \$20,500.



- “Facilities for cultural events” is budgeted at \$5,000 for stage and tent rentals.
- “Municipality services” is budgeted at \$7,500 with sanitation based upon % of tourist attendance.
- “Tourist transportation” is budgeted at \$3,500 and is based upon % of tourist attendance.

The committee voted to recommend a total award of \$27,500 presented in the chart below:

Bluffton Juneteenth Celebration	Total Budget	Recommended ATAX Grant (50% of project budget)
Advertising and Promotion of Tourism:	\$ 20,500	\$ 16,200
Facilities for Civic & Cultural Events:	5,000	5,000
Municipality Services:	7,500	4,900
Tourist Transportation:	3,500	1,400
Project Expenses:	19,000	N/A
<b>Total</b>	<b>\$ 55,500</b>	<b>\$ 27,500</b>

N/A – Not Applicable

☐ **Historic Bluffton Foundation (HBF) requested \$169,000 to support the Welcome Center at the Heyward House.**

- The Heyward House serves as the Town of Bluffton’s official Welcome (Visitors) Center.
- The request of \$169,000 is approximately 82% of the Welcome Center’s budget and 65% of the entire HBF budget.
- This year’s request is \$21,000 or 11% less than last year’s annual request of \$190,000.
- Total visitors projected for FY2021 is expected to reach 10,000 with visitor numbers slowly rebounding due to the COVID-19. In FY2020, the Heyward House served 10,632 visitors with approximately 82% of those being from out of town.

Below is a comparison of the Welcome Center’s FY2021 and FY2022 budgets:

Bluffton Welcome Center	FY2021 Total Budget	FY2021 ATAX Award	FY2022 Total Budget	FY2022 Recommended ATAX Award 82%	% Increase/ (Decrease) in ATAX Awards
Salaries and Benefits:	\$ 123,000	\$ 109,010	\$ 130,000	\$ 107,000	(2%)
Mortgage, Insurance & Utility Costs:	30,340	30,340	26,000	21,500	(29%)
Events/Programs:	2,400	2,400*	3,000	3,000*	25%
Advert. & Marketing:	4,500	4,500*	4,000	4,000*	(11%)
Equipment Upgrades:	3,690	3,690	4,000	3,500	(5%)
Contract Services:	27,060	27,060	24,300	20,000	(26%)
Other:	0	0	5,950	0	N/A
Capital Improvements:	13,000	13,000	10,000	13,000	(23%)
<b>Total</b>	<b>\$ 203,990</b>	<b>\$ 190,000</b>	<b>\$ 207,250</b>	<b>\$ 169,000</b>	<b>(11%)</b>

\* Notes items funded at 100% while others are funded based on percentage of tourism.

N/A – Not Applicable

- Eligible “tourism-related expenditures” include:
  - “Advertising and promotion of tourism” is budgeted at \$4,000 with details provided in the Marketing Plan found on page 13 if the application.
  - “Arts & Cultural Events” is budgeted at \$3,000 for tours and events but is dependent upon COVID-19 impact and duration.
  - “Operating Visitor Information Center” remaining amount requested is \$162,000 and qualifies per SC Revenue Ruling #98-22, *“expenditures that will qualify under this category are any monies spent to operate and maintain centers whose primary purpose is to provide information, brochures, and other services to tourist.”*
    - Operating Expenses of \$152,000 include personnel, mortgage and utilities, equipment upgrades and contract services for the Heyward House.
    - Capital Improvements of up to \$10,000 include:
      - Shutters and dormers: \$9,000
      - Exterior rotten soffits repairs: \$7,000
      - Tree and limb removal and mitigation: \$4,000
      - Windows and surround repair and replacement: \$3,000

The committee voted to recommend a total award of \$169,000 presented in the chart below:

Welcome Center at the Heyward House	Total Welcome Center Budget	Recommended ATAX Grant (approx. 82% of project budget)
Advertising and Promotion of Tourism:	\$ 4,000	\$4,000
Arts & Cultural Events:	3,000	3,000
Operating Visitor Information Center:	200,250	162,000
<b>Total</b>	<b>\$ 207,250</b>	<b>\$169,000</b>

□ **Society of Bluffton Artists (SoBA) requested \$18,200 in support of advertising and promotion of tourism for Promoting the Arts in the Lowcountry and Beyond with ATAC recommending \$18,200.**

- There is an amended budget and request from the original included in the application that brought the budget from \$40,500 to \$36,400 and the request from \$20,000 to \$18,200.
- The gallery/education center is located at 6 Church Street in Old Town Bluffton and is currently going through a rebranding process to update its logo.
- Traditionally, SoBA has attracted and sold to over 60% of visitors and sales being tourists.
- Eligible “tourism-related expenditures” include:
  - “Advertising and promotion of tourism” is budgeted at \$36,400 for regional marketing, contract with Bragg Media for new website, social media, newsletters, etc., and promotional items to include print material for art classes and event.

The committee voted to recommend a total award of \$18,200 presented in the chart below:

Promoting the Arts in the Lowcountry and Beyond	Total Budget	Recommended ATAX Grant (50% of project budget)
Advertising and Promotion of Tourism:	\$ 36,400	\$ 18,200
<b>Total</b>	<b>\$ 36,400</b>	<b>\$ 18,200</b>

**ATTACHMENTS:**

1. Accommodations Tax Advisory Committee (ATAC) draft meeting minutes from May 18, 2021
2. Resolution Approving FY2022 Budget and Marketing Plan
3. DMO Contract 2019-33 between Hilton Head Island-Bluffton Chamber of Commerce and Town of Bluffton
4. Hilton Head Island-Bluffton Chamber of Commerce: FY2022 Budget and Marketing Plan
5. Bluffton MLK Observance Committee: Bluffton Juneteenth Celebration Grant Application
6. Bluffton MLK Observance Committee: Bluffton Juneteenth Celebration Staff Report
7. Resolution Authorizing Amendment 3 to MOA 2017-69
8. Memorandum of Agreement 2017-69
9. Historic Bluffton Foundation: Welcome Center at Heyward House Grant Application
10. Historic Bluffton Foundation: Welcome Center at Heyward House ATAC Staff Report and Scoring Sheet Summary
11. Society of Bluffton Artists: Promoting the Arts in the Lowcountry and Beyond Grant Application
12. Society of Bluffton Artists: Promoting the Arts in the Lowcountry and Beyond ATAC Staff Report and Scoring Sheet Summary
13. ATAC Scoring Table Rating Matrix
14. Previously Funded Grant Listing
15. Council Motion Recommendations

**ACCOMMODATIONS TAX ADVISORY COMMITTEE MEETING MINUTES  
MAY 18, 2021**

Vice Chair Jean Wilson called the meeting to order at 6:03p.m. Other committee members present were Mike Tripka, Joe Kropiewnicki, Ellen Shumaker, Christy Parker, and Nathaniel Pringle. Committee member absent was Chair, Sam Britt. Staff in attendance was as follows: Natalie Majorkiewicz, Treasury Manager and Kristy Carge, Treasury Supervisor.

Roll Call and Confirmation of Quorum

Six committee members present, one absent, quorum met.

Adoption of Agenda

Vice Chairman moved to adopt the Agenda.

**Wilson motioned to adopt agenda as stated. Shumaker seconded. The motion carried unanimously.**

Adoption Minutes:

Vice Chairman moved to adopt the minutes.

**Wilson motioned to adopt minutes as stated. Kropiewnicki seconded. The motion carried unanimously.**

New Business:

Wilson reviewed the updated timeframe for the Hilton Head Symphony Orchestra's event. Majorkiewicz discussed scheduling a workshop to assist with more organizations to apply for grant funds, possible updates, and reorganization to the ATAC application. Dates for the workshop will be proposed and sent to the committee.

Financial Report: Natalie Majorkiewicz, Treasury Manager

The total funds available for distributions are **\$1,488,053**. When comparing the State and Local Accommodations Tax collections for the quarter ending March 2021 to the same quarter of last year, the revenues are up \$221,372 or 114%. There are 3 applicants for this quarter with \$446,500 for requests.

(DMO) Hilton Head Island - Bluffton Chamber of Commerce: Bluffton Marketing Plan 2021-22:

Ariana Pernice, Vice President, Hilton Head Island – Bluffton Chamber of Commerce provided an overview. Pernice reviewed the details and outcomes from the Path Forward Readiness Plan which was implemented during the 2020 COVID pandemic. Moving forward to the new fiscal year the Key Areas of Interest were defined as well as who the marketing efforts are targeting. Pernice explained that their website serves as a long-term platform for visitors who travel to the area. The 2022 Strategies were outlined, and new initiatives include a Destination Website, an Explore Bluffton Video Series, and a dedicated Official Bluffton Vacation Planner. The requested budget totals \$230,000.00, which aligns with pre-pandemic efforts.

**Kropiewnicki motioned to approve. Tripka seconded. The motion carried unanimously.**

Bluffton MLK Observance Committee: Bluffton Juneteenth Celebration - \$27,500:

Katherine Louw, Director of Good, Watterson Brands and Jackie Brown, Secretary provided an overview. Louw explained the MLK Observance Committee has hosted 6 previous Juneteenth Celebrations. They believe they now have the opportunity to draw visitors from the entire region. This event will host local Gullah vendors, food trucks, spoken word, dancing and music to help bring the community together. Wilson asked when the advertising will start. Louw explained the delay occurred as they were waiting on a piece of commissioned artwork to be completed by a local artist as part of the advertising. Louw stated other advertising will be done via radio, television, and print ads. Kropiewnicki asked if any digital marketing attempts will be done to reach visitors from outside the area. Louw stated that form of advertising is still in development. They have secured \$7,000 out of the projected \$10,000 in community sponsorships. The Low Country Legacy Fund will cover any costs not paid by community sponsors. A ticketed second event of Sunday Brunch with live entertainment has been added with the intention to increase overnight stays. An option to collect tourist statistics is using a QR code at the entrance. Parker suggested using USCB volunteers to assist with tracking the information should the QR codes not be available in time.

**Tripka motioned to grant \$27,500 as presented in the Staff report. Kropiewnicki seconded. The motion carried unanimously.**

Historic Bluffton Foundation: Welcome Center at the Heyward House – \$169,000:

Kelly Graham, Executive Director provided an overview. Graham explained adjustments made to the Welcome Center in order to continue to operate during the pandemic with moving all the brochures and maps to the back porch of the Heyward House for visitors to obtain. Graham also explained the advertising material, brochures, etc. are provided by local merchants and are not included in the advertising budget. The material visitors are taking has increased since the doors were not open to the public. Although the museum is closed for tours, the walking tours and grounds tours are still in operation and continue to grow in numbers. The museum is set to reopen to the public in late June. Tours will be limited and will be reserved and paid for by telephone. Graham stated the redesigned website has been brought “in house” for all updates and management. The Bluffton film is also now available on the website and has had over 7,000 views. The rental applications for Common Ground have also been moved to the website for ease of use. Common Ground is averaging 3 rentals per month, generating previously uncaptured revenue. The Historic Bluffton Foundation has received both rounds of the Federal PPE loans, assisting with salary coverage and overhead, not drawing from the previous ATAC grant. Graham stated this has generated a surplus, therefore, this year’s request is \$21,000 less than last year’s request. Kropiewnicki asked if there would be a price increase for the use of Common Ground to continue the revenue stream. Graham stated he doesn’t want to raise it too high but would not be opposed to it in the future.

**Wilson motioned to grant \$169,000 as presented in the Staff Report. Shumaker seconded. The motion carried unanimously.**

Society of Bluffton Artists: Promoting the Arts in the Lowcountry and Beyond - \$18,200:

Marie Burgeson, President and John Kenney, Treasurer of SoBA provided an overview. Burgeson explained that Social Media is the largest draw for the organization, using videos and photographs multiple times per week. Bragg Media is their marketing company, who promotes SoBA to the entire Southeast region. A portion of this year's request is for the creation of a new website, which is almost completed. There are also rebranding efforts in play, including new signage. Wilson asked for clarification on the rebranding. Burgeson explained they will still be SoBA, but with a new, different look which will appear on their website, rack cards and signage. She further explained the hopes are for the new website to enhance the draw to Bluffton while promoting the gallery. Prior to the pandemic a guest book was kept, identifying where customers were from and showing over 75% were tourists. The gallery is hoping to be able to bring the guest book back in the near future. Artists and instructors come from out of town and sometimes out of country. Therefore, SoBA has partnered with the old Town Bluffton Inn to provide lodging assistance. Burgeson explained they were able to qualify for the Carolina Cares grants which has assisted in offsetting certain costs.

**Pringle motioned to grant \$18,200 as presented in the Staff Report. Kropiewnicki seconded. The motion carried unanimously.**

Meeting adjourned at 7:20 p.m.

**Wilson motioned to approve. Shumaker seconded. The motion carried unanimously.**

## RESOLUTION

**A RESOLUTION OF THE TOWN OF BLUFFTON APPROVING THE HILTON HEAD ISLAND – BLUFFTON CHAMBER OF COMMERCE TO MANAGE AND DIRECT THE EXPENDITURE OF THE SPECIAL FUND OF THE TOWN OF BLUFFTON CONSISTING OF THIRTY PERCENT (30%) OF THE BALANCE OF STATE ACCOMMODATIONS TAX AND UP TO EIGHT PERCENT (8%) OF THE BALANCE OF LOCAL ACCOMMODATIONS TAX REVENUE TO BE USED ONLY FOR ADVERTISING AND PROMOTION OF TOURISM TO DEVELOP AND INCREASE TOURIST ATTENDANCE THROUGH THE GENERATION OF PUBLICITY AS OUTLINED IN THE FY2021 BUDGET AND MARKETING PLAN AND IN ACCORDANCE WITH CONTRACT 2019-33.**

**WHEREAS**, S.C. Code § 6-4-10 provides, in part, that the funds received by a municipality collecting more than fifty thousand dollars (\$50,000) from the local accommodations tax must allocate thirty percent (30%) of the balance received as defined in said code section to a special fund to be used only for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity; and

**WHEREAS**, S.C. Code § 6-1-520 permits the Town to impose, by ordinance, a local accommodations tax, not to exceed three percent (3%), on the gross proceeds derived from the rental or charges for accommodations furnished to transients as provided in S.C. Code 1976 § 12-36-920(A); and

**WHEREAS**, Town of Bluffton Code of Ordinances, Sec. 24-26(b) provides, in part, that an amount not to exceed eight percent (8%) of local accommodations tax may be set aside to a special fund to be used only for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity; and

**WHEREAS**, S.C. Code § 6-4-10 provides, in part, that the Town of Bluffton shall designate one or more organizations, such as a chamber of commerce, visitor and convention bureau, or regional tourism commission, which has an existing, ongoing tourist promotion program to manage and direct the expenditure of these tourism promotion funds; and

**WHEREAS**, the Town of Bluffton awarded contract 2019-33 to the Hilton Head Island-Bluffton Chamber of Commerce as the Town of Bluffton's Designated Marketing Organization that began on July 1, 2019 and shall continue for a period of up to three (3) years.

**NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:**

- The Hilton Head Island – Bluffton Chamber of Commerce continue as the Designated Marketing Organization (DMO) to manage and direct the expenditures of the special fund for FY2022; and

- In accordance with South Carolina state law, the DMO has submitted for approval an annual budget of planned expenditures by April 1<sup>st</sup> for FY2022.
- For FY 2022, Thirty percent (30%) of the balance of state accommodation tax as designated by Section 6-4-10(3) of the South Carolina Code of Laws, 1976 as amended be allocated to the special fund; and
- For FY 2022, an amount of eight percent (8%) of local accommodations tax be allocated to the special fund; and
- Immediately upon receipt to the special fund on a quarterly basis, the Town shall distribute the tourism promotion funds to the DMO; and
- The DMO shall render to the Town an accounting of all FY2022 expenditures by no later than November 1, 2022.

**THIS RESOLUTION SHALL TAKE FULL FORCE AND EFFECT ON JULY 1, 2021.**

**SIGNED, SEALED AND DELIVERED AS OF THIS 8<sup>th</sup> DAY OF JUNE 2021.**

\_\_\_\_\_  
Lisa Sulka, Mayor  
Town of Bluffton, South Carolina

ATTEST:

\_\_\_\_\_  
Kimberly Chapman, Town Clerk  
Town of Bluffton, South Carolina



**TOWN OF BLUFFTON AGREEMENT**  
**Contract Number 2019-33**

COUNTY OF BEAUFORT

STATE OF SOUTH CAROLINA

**THIS AGREEMENT** is made the 11th of OCTOBER, 2019 between Hilton Head Island – Bluffton Chamber of Commerce (hereinafter called “Chamber”) and the Town of Bluffton (hereinafter called “Town”), a municipal corporation organized and existing under the laws of the State of South Carolina.

**WHEREAS**, the Town is a recipient of an allocation of State accommodations tax revenues (“ATAX”) as defined in South Carolina Code (“S.C.C.”) Section 6-4 which must be allocated to a special fund and used only for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity.

**WHEREAS**, Chapter 24 of the Bluffton Code of Ordinances allows for locally generated ATAX to be used for advertisements and promotions related to tourism development.

**WHEREAS**, S.C.C. 6-4 and Chapter 24 of the Bluffton Code of Ordinances specify that one or more organizations may be selected to receive these funds to further such advertisement and promotions so long as they meet specific criteria, including but not limited to: being organized as a non-profit organization employing a full-time executive director, submit an annual budget of planned expenditures, and provide an annual audited financial report generated in accordance with generally accepted accounting principles (“GAAP”).

**WHEREAS**, the Town desires to enter into an Agreement with a non-profit who meets all of the statutory criteria for the purpose of advertising and promotion of tourism to develop and increase tourist attendance within the Town of Bluffton;

**WHEREAS**, the Town published a Request for Proposal detailing a scope of work, deliverables and specific schedule, and the Chamber responded thereto, and

**WHEREAS**, the Town and Chamber desire to enter into an Agreement wherein the Chamber shall provide such services as set forth herein and described in their Request for Proposal response 2019-33.

**NOW, THEREFORE**, for and in consideration of the mutual promises, undertaking and covenants set forth herein, the receipt and sufficiency of which are acknowledged and affirmed by the Town and the Chamber, the parties hereto agree as follows:

**1. Chamber Obligations.**

- 1.1 Audit. The Chamber agrees to provide an independent auditor’s financial report to the Town on an annual basis for each fiscal year it is under contract. The Chamber’s fiscal year runs from July 1 to June 30. The audit shall be delivered to the Town no later than November 15 after the applicable fiscal year ends.

The following standards shall apply to the audit and/or the auditor:

- (a) The audit shall be conducted in conformity with the statements, rules, policies, and procedures set forth by the American Institute of Certified Public Accountants (“AICPA”).
- (b) The audit shall be performed in accordance with generally accepted auditing standards (“GAAS”).
- (c) The auditor must comply with all applicable statement on auditing standards (“SAS”) that are issued by the Auditor’s Standing Board of the AICPA.
- (d) The auditor must maintain malpractice insurance in an amount equal to at least One Million dollars (\$1,000,000.00).
- (e) The auditor must provide evidence of successful completion of the peer review process approved by the AICPA.

- 1.2 DMO Report. On a quarterly basis, the Chamber shall produce and deliver to the Town a schedule of revenues and expenses incurred to date for each fiscal year ("the Report") for the designated marketing organization division of the Chamber ("DMO"). The DMO revenue shall include all accommodation tax revenue received from the Town and/or the State of South Carolina. This Report shall be produced under the standards set forth above in Section 1.1(a), (b), and (c) and by the same auditor that has satisfied the standards set forth above in Section 1.2(d) and (e). The Quarterly Reports shall be delivered to the Town within 30 calendar days following October 1, January 1, and April 1, and the Annual Report with cumulative data no later than November 15 after the applicable fiscal year ends.
- 1.3 ATAX Disbursements. The Chamber shall manage and direct the expenditure of any ATAX monies disbursed to them, whether State or local in origin. In addition, the Chamber shall be eligible to apply for quarterly supplemental grants from the accommodation tax pool and from the emergency reserve fund established by the Town. All public funds received by the Chamber shall be subjected to the auditing and reporting requirements of this Agreement.
- 1.4 Process. The Chamber shall submit a budget of planned expenditures and a marketing plan ("MP") for the ATAX disbursement for each fiscal year. The MP shall be recommended by the Chamber's marketing professionals and the MP and the budget shall be approved by the Board of Directors of the Chamber. The budget and MP will then be submitted to the Town prior to April 1. The Town's accommodations tax committee ("ATAC") will review and make recommendation to Town Council. Upon the recommendation by the ATAC, the budget and MP shall be forwarded for approval to Town Council before the beginning of each fiscal year.
- 1.5 Inspection Rights. The Chamber shall provide access, upon reasonable notice, to the Town Manager, Town Council member(s), or Town Manager's designee (who possesses sufficient financial acumen) to inspect the necessary financial records, including third party invoices, of the Chamber in order to verify compliance of the Report in all material respects. This inspection right may be invoked twice per year.
- 1.6 Web Site. Subject to an agreement on the costs, the Chamber shall develop and maintain a website that is unique to Bluffton which shall remain the work product of the Town under an open Content Management System platform. The design and functionality of the website should be responsive in a variety of environments including desktop, tablet, and mobile. The Chamber will work with the Town to measure website traffic and develop a comprehensive Search Engine Optimization plan.

## **2. Performance Standards.**

- 2.1 Industry Metrics. The Chamber shall provide the Town with certain tourism metrics as follows ("Industry Metrics"):
- (a) Revenue per available room;
  - (b) Occupancy rates;
  - (c) Visitor spending studies;
  - (d) Return on investment for visitor spending per dollar of investment;
  - (e) Local tax revenues generated by visitors;
  - (f) Number of visitors;
  - (g) Number of referrals made to area businesses and number of website hits and click throughs made to area businesses;
  - (h) Numbers related to mail fulfillment and other contacts;
  - (i) Industry awards received for marketing and public relations efforts;
  - (j) Number of jobs created by tourism;
  - (k) Events held and participation in events by Chamber members; and

- (l) Update on public relations efforts to include number of media impressions and dollar equivalent for the media impressions.

The content and format of the Industry Metrics report may change from time to time at the discretion of the Town and in accordance with activities planned in the Marketing Report. The Industry Metrics reports shall be submitted quarterly within 30 calendar days following October 1, January 1, April 1 and July 1. The Industry Metrics report shall also include year over year metrics as available.

- 2.2. Key Performance Indicators. The Town shall use the Industry Metrics reports to evaluate the performance of the Chamber against the objectives stated in the Marketing Plan, resulting in an evaluation of Key Performance Indicators ("KPIs"). Such evaluation shall take into account outside effects on tourism such as the state of the economy, weather, etc. In the event that the Town, in its sole discretion, determines that the Chamber is not meeting the objectives of the Key Performance Indicators, it shall work with the Chamber on a remedial plan to cure the deficiencies. If the Chamber does not meet the objectives and deadlines of the remedial cure plan, the Town shall have the right to provide written notice of contract termination.

### **3. Chamber Covenants and Representations.**

- 3.1 The Chamber covenants and represents that it has all necessary licenses, permissions and authority to enter into this Agreement.
- 3.2 The Chamber covenants and represents to perform all tasks required under this Agreement with a degree of skill and care of reputable organizations of the same profession nationally.
- 3.3 The Chamber covenants and represents to properly withhold from all wages, commissions, salaries, and fees paid by the Chamber to third parties or employees, agents, or subcontractors of the Chamber all amounts required by state or federal law to be withheld for or on account of taxes, social security payments, or other withholdings mandated by law or regulation.
- 3.4 The Chamber covenants and represents that it shall maintain the appropriate amounts and coverages of insurance for general liability, auto liability, and workers compensation as determined by the Town for the entire length of the Agreement. The Chamber must provide the Town with a Certificate of Insurance that names the Town as an additional insured on their general liability policy. The Chamber is required to immediately contact the Town should any change to these policies occur during the course of the performance of this contract.
- 3.5 The Chamber covenants and represents that it shall comply with the most current Federal and State of South Carolina Laws and Regulations, including but not limited to, Fair Labor Standards Act of 1938, Title VII of the Civil Rights Act of 1964, Americans with Disabilities Act of 1990, the South Carolina Wage Act, the South Carolina Worker's Compensation Act, all laws related to the South Carolina Accommodation Tax, and all Town of Bluffton Ordinances.
- 3.6 The Chamber covenants and represents that the MP shall include a public relations plan and a social media plan, including development and maintenance of the Town of Bluffton tourism web site.

### **4. Town Covenants and Representations.**

- 4.1 The Town hereby covenants and represents that it will comply with all state and local accommodation tax laws and ordinances in administering all such funds to the Chamber and other non-profit organizations.
- 4.2 The Town hereby covenants and represents that it shall comply with all such laws and procedures in a manner not to discriminate against one non-profit versus another non-profit.
- 4.3 The Town hereby covenants and represents that it shall pass a resolution no later than June 30 of the preceding fiscal year allocating the funding for the upcoming fiscal year.

- 4.4 The Town hereby covenants and represents that it shall cause the funding to be paid quarterly to the Chamber for the budget and MP to be implemented. Quarterly payments will be made within 5 days of receipt of quarterly State ATAX proceeds.
- 4.5 The Town hereby covenants and represents not to disturb, violate, request to be violated, any laws, loan covenants, policies and procedures, including but not limited to all federal and state laws, and the South Carolina Non-Profit Act which effect the Chamber.
- 4.6 The Town hereby covenants and represents that the Town has lawful authority required under State law and Town ordinances to enter into and perform this Agreement.
5. **Term.** This Agreement shall be effective July 1, 2019 and shall continue for a period of up to three (3) years unless otherwise terminated as provided herein. Each party retains the right to terminate this Agreement in accordance with Section 6.
6. **Termination.**
- 6.1 **For Cause.** If the Performance Standards have not been met, and the Chamber has not cured in accordance with Section 2.2, the Town may terminate this Agreement by providing ninety (90) day notice to the Chamber. In the event the auditor determines fraud has occurred, the Town may terminate this Agreement immediately.
- 6.2 **For Convenience.** Each party shall have the ability to terminate the Agreement by providing the other party 90 days' written notice.
7. **Other Provisions.**
- 7.1 **Headings.** Headings to paragraphs in this Agreement shall not interpret or alter the meaning of the words in the respective paragraph, nor any other provision of this Agreement.
- 7.2 **Notices.** All notices to each party shall be in writing and sent as follows:
- |                                  |                                    |
|----------------------------------|------------------------------------|
| Town of Bluffton                 | HHI – Bluffton Chamber of Commerce |
| ATTN: Marc Orlando, Town Manager | ATTN: William G. Miles             |
| PO Box 386                       | PO Box 5647                        |
| Bluffton, SC 29910               | Hilton Head Island, SC 29938       |
- 7.3 **Jurisdiction.** This Agreement has been made and entered into in the State of South Carolina, and the laws of South Carolina shall govern the validity and interpretation of this Agreement in the performance due hereunder.
- 7.4 **Independent Contractor Status.** The Chamber shall not, by entering into this Agreement, become a servant, agent, or employee of the Town, but shall remain at all times an independent contractor. This Agreement shall not be deemed to create any joint venture, partnership, or common enterprise between the Chamber and the Town, and the rights and obligations of the parties shall not be other than as expressly set forth herein.
- 7.5 **Attorney's Fees. Dispute Resolution.** In the event of a dispute between the parties, the prevailing party in any dispute shall be entitled to an award of all reasonable attorneys and costs.

IN WITNESS WHEREOF, the parties hereto affixed their signatures hereto the date first written hereinabove.

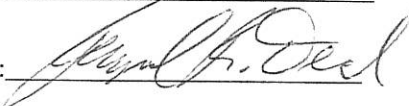
HILTON HEAD ISLAND-BLUFFTON CHAMBER OF COMMERCE

TOWN OF BLUFFTON

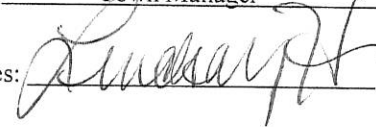
Date: 10-16-2019  
 By: [Signature]  
 Print Name: William G. Miles

Date: 10-20-19  
 By: [Signature]  
 Print Name: Marc Orlando

Position: President & CEO

Witnesses: 

Position: Town Manager

Witnesses: 



FISCAL YEAR 2021-2022

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# TOWN OF BLUFFTON

## DESTINATION MARKETING PLAN

bluffton

HEART OF THE LOWCOUNTRY







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# Year in Review

## Awards & Mentions



**Montage Palmetto Bluff named among  
“Best Places to Travel in May”**

**The Cottage named in the “Eat” category for one of the  
“Greatest Travel Spots” by *South Magazine***

**Montage Palmetto Bluff named among *Travel + Leisure* World’s  
Best Awards “The Top 15 Resort Hotels in the South”**

**Montage Palmetto Bluff was a featured destination  
for future travel and as a spot in “Best Weekend Road Trips”  
in *Travel + Leisure***

**Montage Palmetto Bluff receives *Forbes*  
Travel Guide’s 5-Star Award**

**Bluffton is listed as among  
“20 Small Towns that Leave an Impression” in *Country Living***

**Montage Palmetto Bluff is named to *Condé Nast Traveler’s* World  
Gold List one of only 17 resorts in the U.S.**

**Montage Palmetto Bluff named among *Condé Nast Traveler’s*  
Reader’s Choice Awards “Best Resorts in the South”**

# Social Performance

In 2020, we built on 2019's launch success by focusing on increasing impressions for brand awareness and follower growth, as well as fostering engagement among our audience. We found natural beauty photography outperforms any other kind of content, and are continuously finding ways to showcase the culinary scene, historic landmarks, art scene, and culture in ways that resonate with our audience.

In Q3 and particularly Q4 of 2020, as Covid-19 restrictions loosened, we also implemented new tactics with more direct CTAs to book a Bluffton getaway and posting Instagram Stories with CTAs to click the link in our bio. These efforts proved successful for us which you will see in the numbers below.

## Channel Growth



**12,135**

ExploreBlufftonSC



**3,043**

ExploreBlufftonSC



**625**

VisitBlufftonSC

**377%**

OVERALL  
GROWTH RATE

**120K**

OVERALL  
ENGAGEMENT



**5.96%**

FACEBOOK  
ENGAGEMENT RATE  
(FACEBOOK AVERAGE 0.09%)



**19,282,684**

FACEBOOK  
REACH



**3.76%**

INSTAGRAM  
ENGAGEMENT RATE  
(INSTAGRAM AVERAGE 1.6%)



**1,786,881**

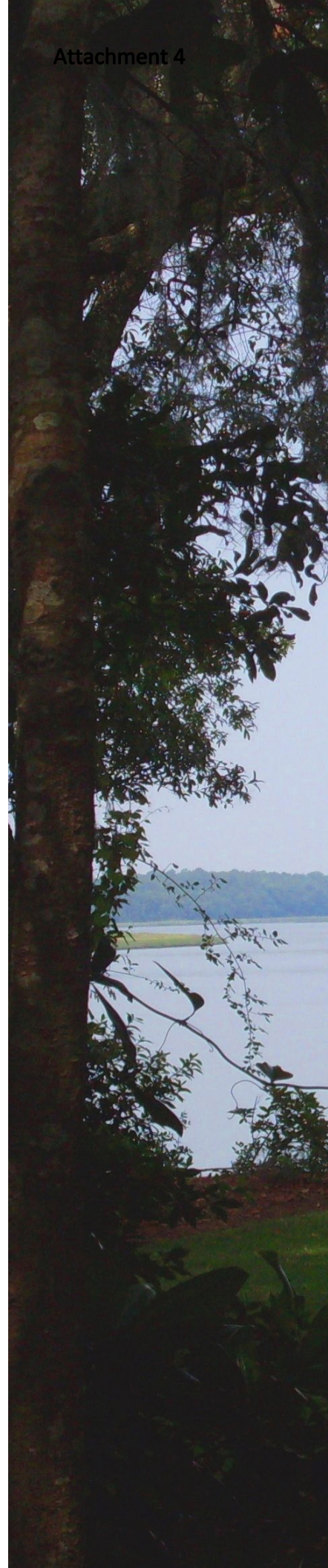
INSTAGRAM  
REACH

# Executive Summary

The Hilton Head Island-Bluffton Chamber of Commerce/Visitor & Convention Bureau continues to be the leader in promoting tourism within Bluffton. The organization as a whole utilizes national economic and tourism trends, consumer research, prior program performance, demographics and takes into consideration the needs of our community (residents and businesses) to be in the best position as the steward of the destination.

The Hilton Head Island-Bluffton Chamber of Commerce and Visitor & Convention Bureau implemented major actions aimed at maintaining its commitment to excellence and leadership in the marketplace this past fiscal year. These included:

- Development and implementation of the Path Forward Readiness Plan, a uniform set of recommended protocols for businesses to follow, provided a consistent and evidence-based approach to protecting the health of our residents, workforce and visitors. Over 150 business owners, residents and community members and government officials gave their input and over 300 businesses took the Pledge to adhere to the recommended guidelines. The Path Forward story was picked up by 140 different media outlets and adopted nationally by VRMA, Vacation Rental Management Association.
- Integration of Zoom technology for our organization to be able to adapt and continue operating seamlessly.
- Development of weekly Tele-Town Hall series to deliver relevant and up to date information to listeners and provide insight from key thought leaders throughout 2020 and into 2021.
- Launch of VisitBluffton.org as an independent website.
- Expansion of air-service and air-carriers at both airports serving the region.
- Board approved 10-year Destination Management Plan that provides the roadmap and shared vision for the community to ensure responsible and sustainable tourism growth.





## Vision

A welcoming, world-class community embracing nature, culture and economic vibrancy for residents and visitors.

## Mission

Stimulate the regional economy while enhancing the quality of life for all.

## Brand Commitment

Bluffton is the heart of the Lowcountry. It speaks to the town's central location, its lovable characteristics, and that Bluffton is the pumping, economic life force of the Lowcountry. Most importantly, it's a tone and a feeling. When you're in the Town of Bluffton, you can see and feel the love. It's real and authentic. It's the heart symbol in your logo, on a window, the pride residents have in their downtown or the warmth shared with strangers at an oyster roast. The Town of Bluffton is a well-kept secret. Nowhere else in the Lowcountry do you feel the love like you do when you are in Bluffton.

*Source: Rawle Murdy Associates 2013*





# 2021-2022 Strategies & Tactics



1. **Expand and broaden organic keyword rankings for Search Engine Marketing (SEM).**

- ☐ Refine and grow a targeted list of keywords that align with the visitors' location and experiences.
- ☐ Develop relationships with potential visitors and key audiences through personalized messaging.
- ☐ Track, measure and analyze all responses within the consumer journey.

2. **Leverage a strategic mix of targeted methods to identify and reach the most qualified users.**

- ☐ Target qualified users through digital video across social platforms.
- ☐ Utilize Google Display Network (GDN) with display ads to increase visits to the website.
- ☐ Cultivate themed ad groups and keywords around categories that target consumers researching vacation terms.
- ☐ Create competitor targeted campaigns to capture demand from those researching other destinations.
- ☐ Reinforce the brand by serving ads to those who have visited the website.

3. **Create content and measurements to adapt to social media platforms.**

- ☐ Continue a paid social strategy for Bluffton-specific posts driving traffic to the website.
- ☐ Integrate the paid and organic social efforts, ensuring content boosting on Facebook when budget permits.
- ☐ Curate more user-generated content.
- ☐ Generate Facebook likes, Instagram followers and Twitter followers, ultimately driving traffic to content-rich pages of the website.
- ☐ Grow social audiences through paid social media strategy.
- ☐ Utilize retargeting efforts for consumers that have engaged with our advertising and visited the website.



4. **Improve the visibility of the Bluffton website within the search results of both search engines and social networks for branded key phrases and emerging search queries.**

- ☐ Ongoing technical audits and comprehensive reviews to ensure content on the website remains crawlable and indexable by search engines.
- ☐ Identify target keywords for content, and regularly highlight optimization opportunities for existing content to ensure relevance for search engines.
- ☐ Identify and attract high quality links from high authority sites, along with sharing of content through influencer outreach and a targeted social media strategy.
- ☐ Optimize and take advantage of new Google My Business (GMB) features where relevant to ensure users interest is captured both on and off-site.
- ☐ Research to find new opportunities for content that, once indexed by search engines, will drive qualified searchers to the website.

5. **Market the destination to prospects in all meetings and group market segments to grow shoulder and off-season business.**

- ☐ Attend tradeshow and/or connect with meeting planners to build awareness and generate leads for group business.

6. **Create a collateral piece with compelling imagery and content about the destination.**

- ☐ Develop and produce the Official Bluffton Vacation Planner.
- ☐ Distribute the planner to visitors, businesses, elected officials, tradeshow, events and media.
- ☐ Create an immersive digital and social version of the planner to leverage the ever-growing visitors online engagement.

7. **Use research and reports to influence future marketing efforts.**

- ☐ Ongoing maintenance of ThinkBluffton.org, the Chamber's online economic metrics portal for Bluffton.
- ☐ Procure Smith Travel Research (STR) and DestiMetrics reporting on a regular basis for measuring lodging occupancy, average room rates, room demand and RevPAR.
- ☐ Collaborate with College of Charleston Office of Tourism Analysis along with ensuring details of our Google analytics and social platforms to provide quarterly and annual performance updates.











## Budget

\*Note that the proposed budget is a projection and dependent on actual ATAX collections for 2021-2022. We will continue to work with the Town of Bluffton throughout the year to make adjustments as needed.

<b>SEO / Social Media (Organic)</b>	<b>\$18,900</b>
<b>Digital Promotions</b>	<b>\$45,000</b>
<b>Media Management &amp; Reporting</b>	<b>\$5,265</b>
<b>Website &amp; Campaign Maintenance</b>	<b>\$14,310</b>
<b>Bluffton Insiders (enews)</b>	<b>\$4,860</b>
<b>Bluffton Vacation Planner</b>	<b>\$22,500</b>
<b>Regional Vacation Planner</b>	<b>\$12,165</b>
<b>Group Tour</b>	<b>\$900</b>
<b>Photography / Videography</b>	<b>\$12,000</b>
<b>Research &amp; Planning</b>	<b>\$4,500</b>
<b>Contingency</b>	<b>\$4,500</b>
<b>Ops &amp; Management</b>	<b>\$85,100</b>
<b>Total Expenses</b>	<b>\$230,000</b>







## Demographics & Personas

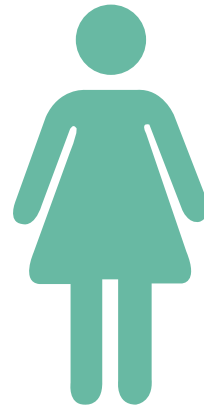
We use multiple primary and secondary data sources to understand who our visitors are and what motivates them to visit Bluffton. Our real-time data sources include Google Analytics, in addition to research, partnering with the Office of Tourism Analysis at the College of Charleston and the University of South Carolina Beaufort. Using these insights we are able to extract visitor persona detail which allows us the ability to further refine our messaging to a more qualified potential consumer.

Today, as we adjust to the new traveler needs, we will continue to keep our demographics and key personas at the forefront, but will adapt as necessary in the short-term to address the consumers travel sentiment. We will expand our drive radius as travelers are willing to drive further distances post quarantine and continue to focus on our short-haul fly markets, supporting new air lift as it becomes available.

We have identified the following key persona groups as:

- Family
- Snowbirds
- Activities/Recreation Enthusiasts
- The Weekender
- Arts, Culture and History
- Culinary

### Our Target Leisure Traveler for the Region



**67.4%**  
Female



**32.6%**  
Male



**\$150K+**  
Affluent Traveler



**59.1%**  
Undergraduate  
Degree or Higher



**2-4** Trips per Year  
**7** Nights Average  
Length of Stay



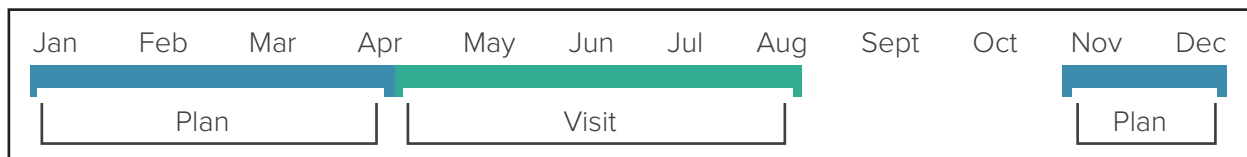
# Family





## Family Travel Objective

Find a vacation spot that will please everyone during the school holidays.




## Travel Habits



## Who They Are

  
Upscale & Status  
Oriented

  
Values  
Family Time

  
Creating a  
Legacy

  
Active & Health  
Conscious

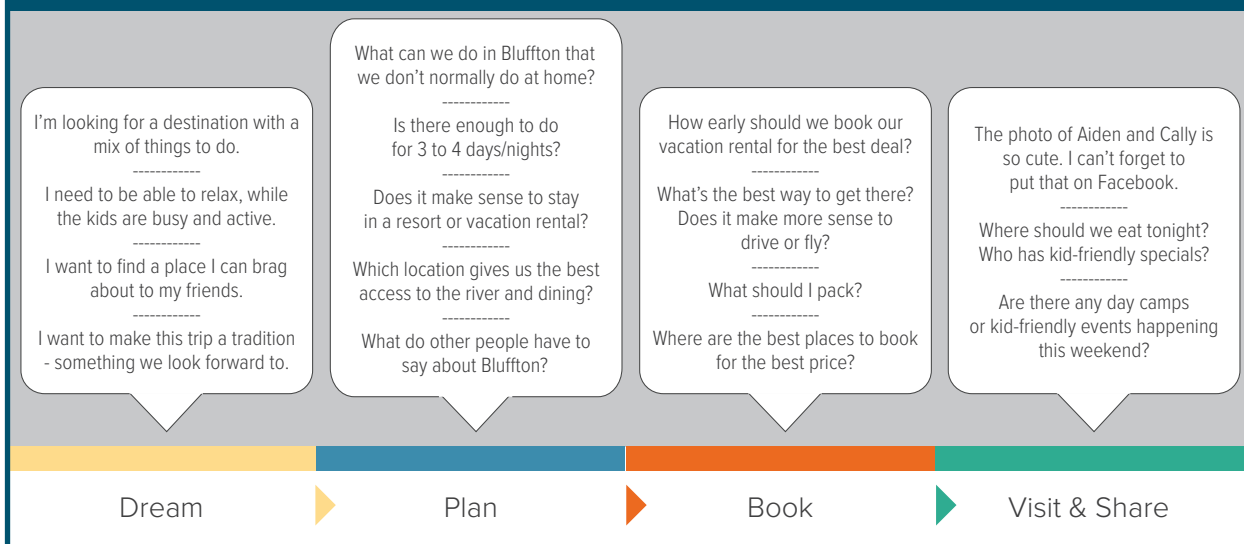
## Preferred Activities & Attractions

Vacation Rentals & Resorts  
Beach & Water Activities  
Biking & Hiking  
Tennis & Pickleball  
Festivals & Events  
Kid-friendly Dining  
Museums & Day Camps

## Marketing Channels & Formats

Facebook Videos  
Instagram  
TripAdvisor  
TV  
Online Video  
Forums & Blogs  
Pinterest

## “Let’s Make Memories.” Their Path to Purchase



# Snowbirds



## Snowbirds Travel Objective

Find a warm destination that feels like home for the winter, where they can welcome family and friends for visits.



## Travel Habits



## Who They Are

  
Traditional

  
Values  
Family Time

  
Enjoys the  
Finer Things

  
Active & Health  
Conscious

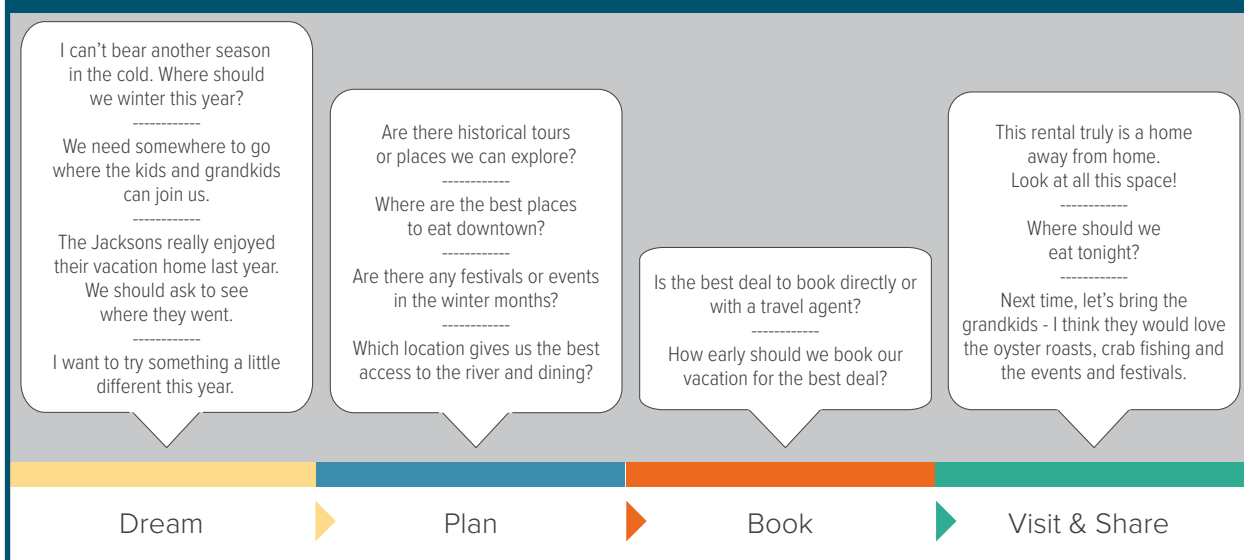
## Preferred Activities & Attractions

Vacation Rentals  
Dining  
Golfing  
History / Culture  
Excursion / Tour  
Biking

## Marketing Channels & Formats

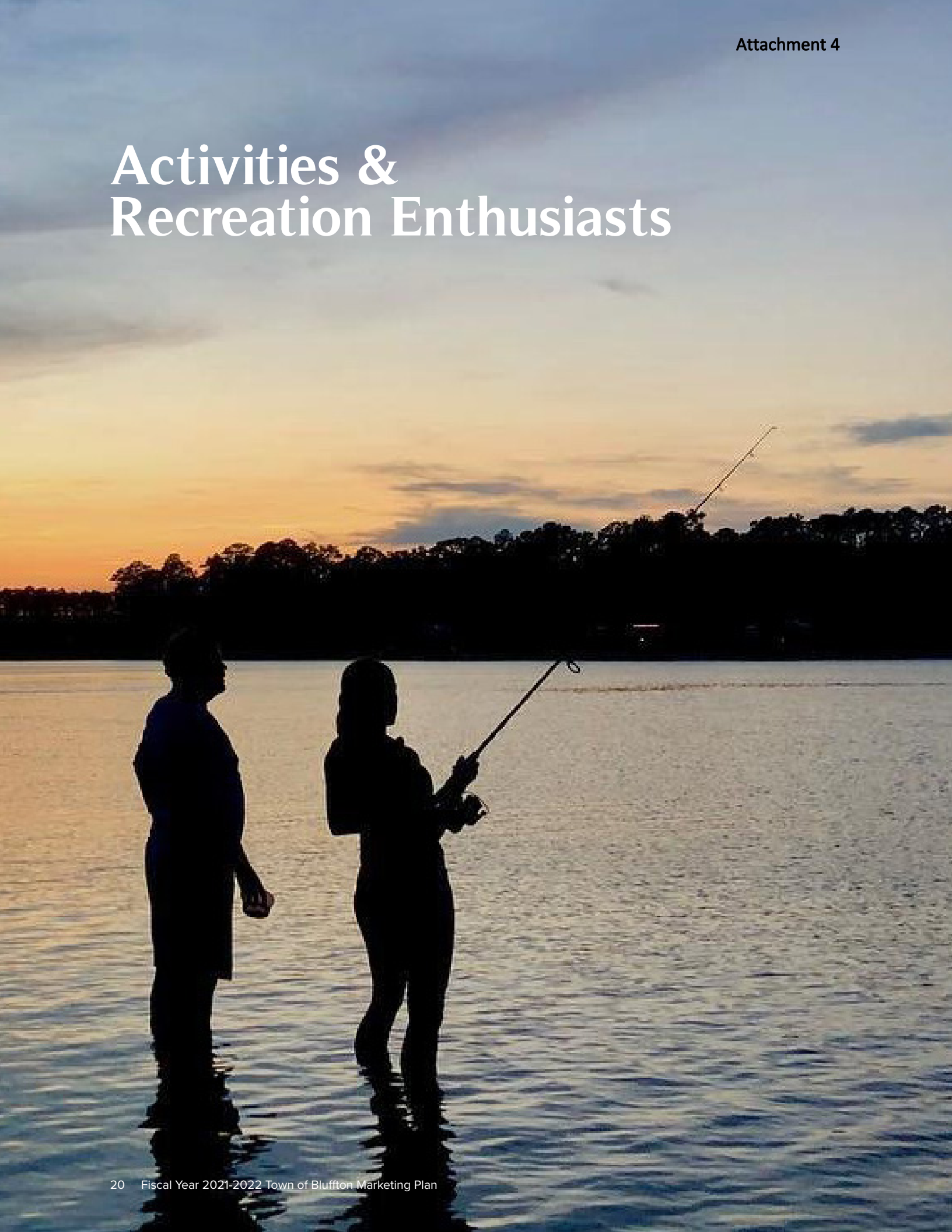
Facebook  
Print  
TripAdvisor  
Radio  
TV  
Online Video

## "Let's Make this Feel like Home." Their Path to Purchase



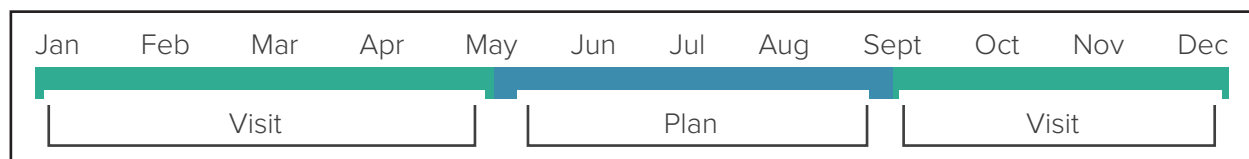


# Activities & Recreation Enthusiasts

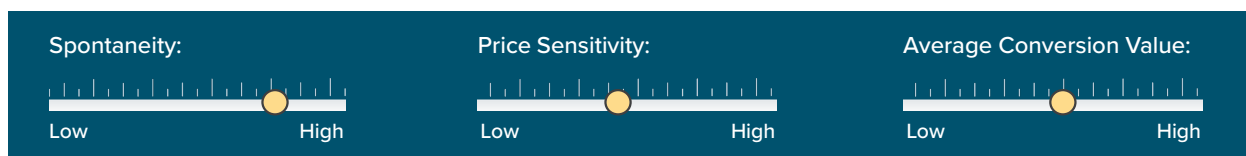


## Activities / Recreation Enthusiast Travel Objective

Find a destination where they can pursue their interests on their downtime.



## Travel Habits



## Who They Are



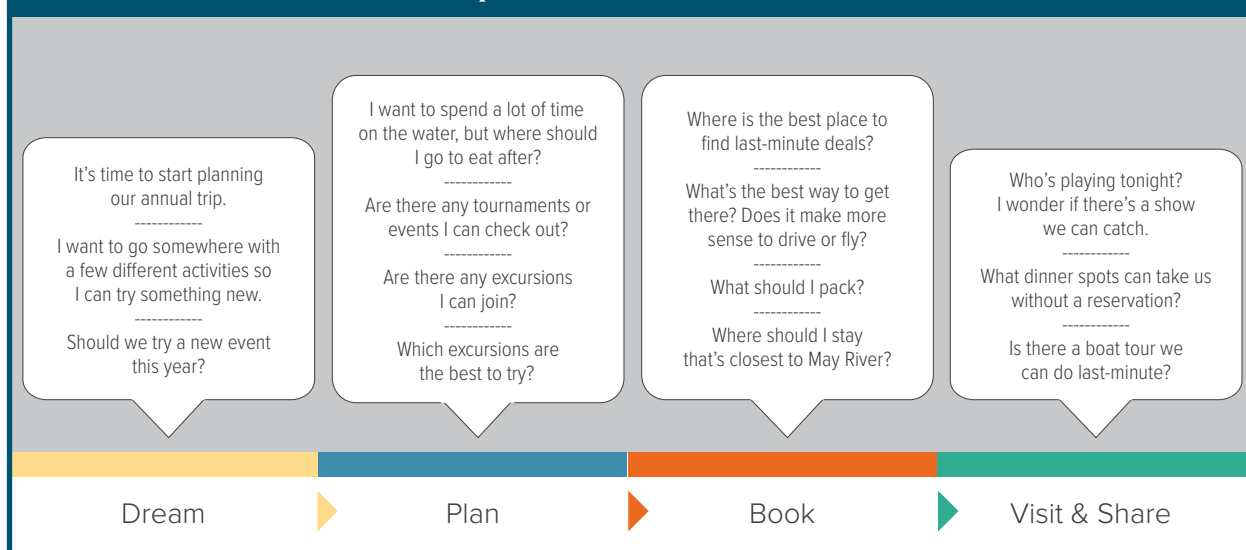
## Preferred Activities & Attractions

Golf  
Boating & Water Activities  
Hiking & Biking  
Nightlife

## Marketing Channels & Formats

Facebook Videos  
Instagram  
Twitter  
TripAdvisor  
TV  
Online Video  
Forums & Blogs

## "Let's Explore." Their Path to Purchase





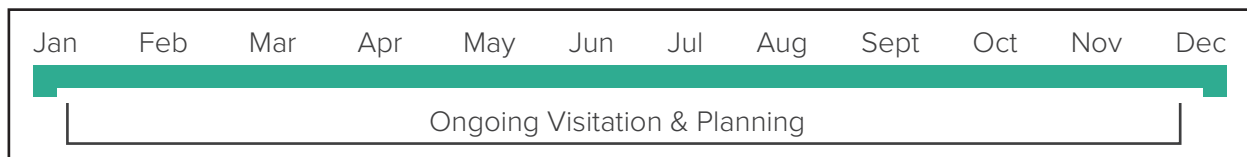
# The Weekender



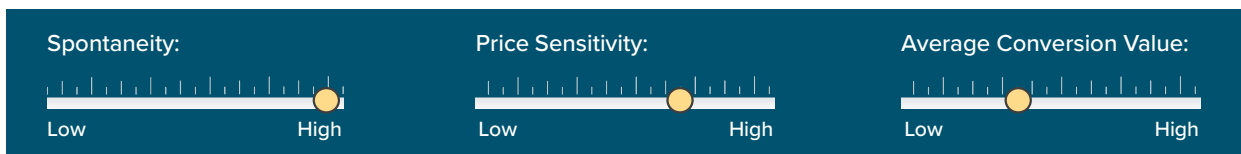


## The Weekender Travel Objective

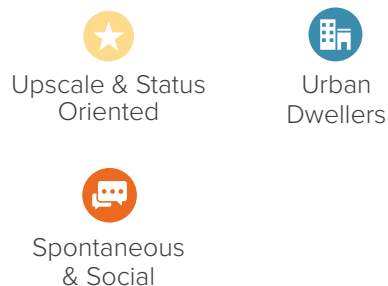
Find a fairweather weekend escape from work and city life.



## Travel Habits



## Who They Are



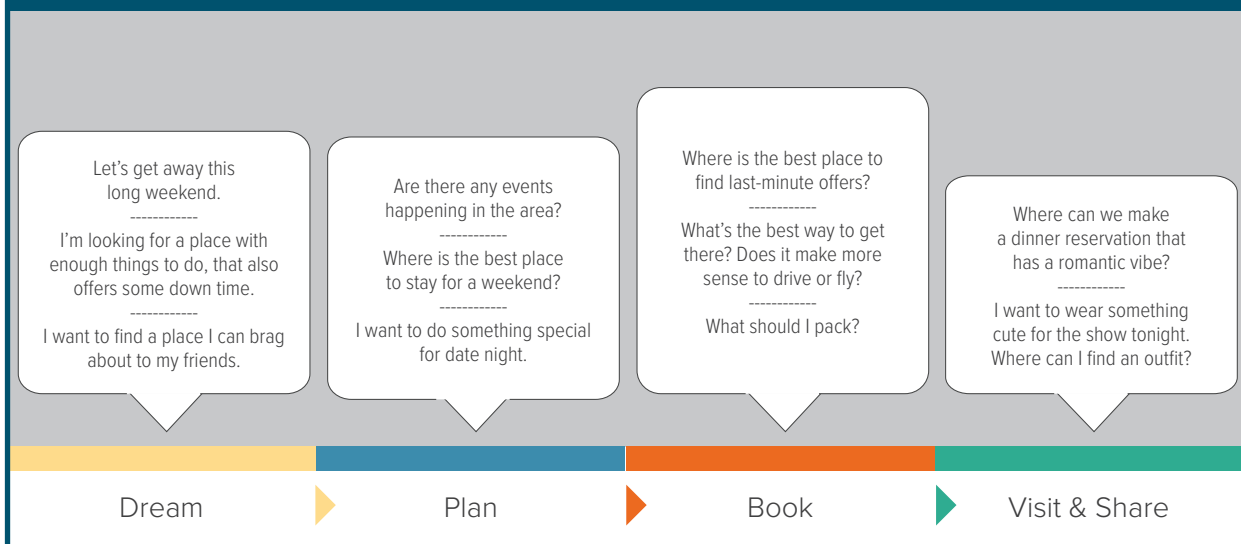
## Preferred Activities & Attractions

Vacation Rentals & Resorts  
Water Activities  
Dining & Shopping  
Romantic Things to Do  
Festivals & Events  
Weddings  
Palmetto Bluff

## Marketing Channels & Formats

Facebook Videos  
Instagram  
TripAdvisor  
TV  
Online Video  
Forums & Blogs  
Pinterest

## “Let’s Get Away.” Their Path to Purchase





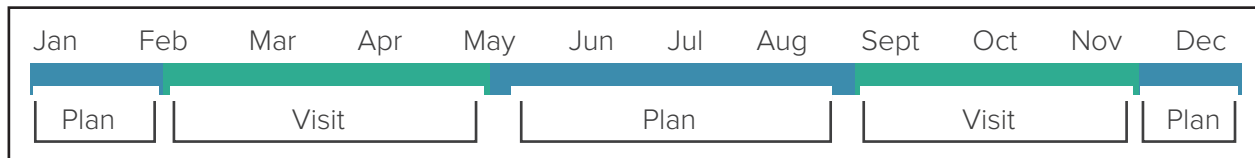
# Arts, Culture & History





## Arts, Culture & History Travel Objective

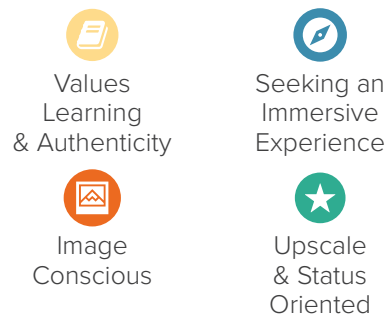
To explore cultural attractions, historical sites and the local arts scene.



## Travel Habits



## Who They Are



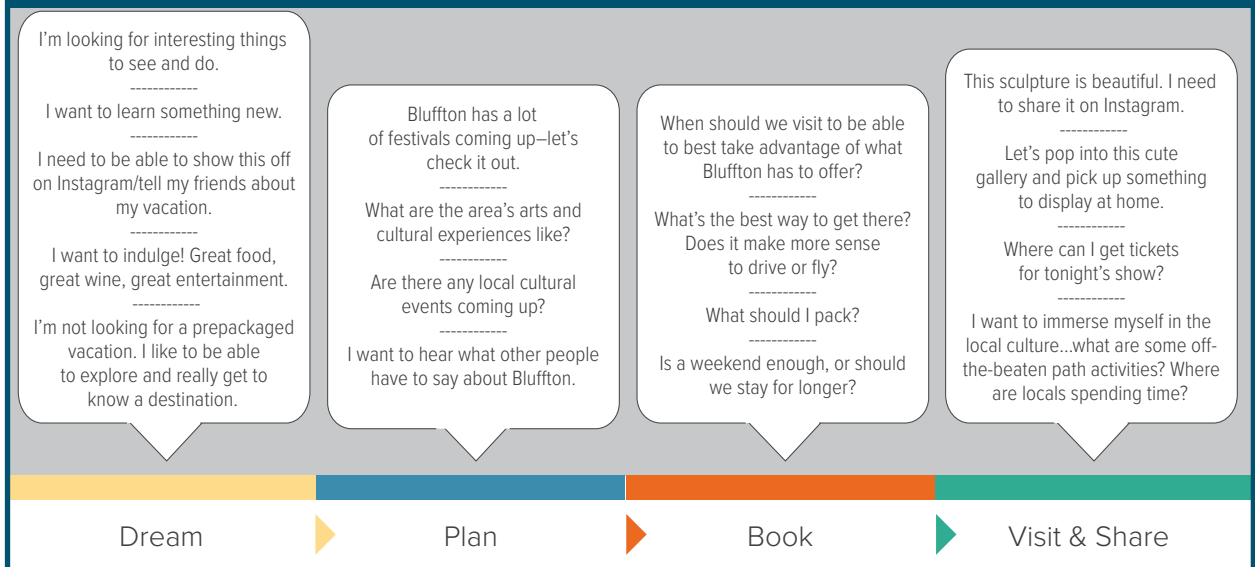
## Preferred Activities & Attractions

Historical District & Attractions  
 Art District & Galleries  
 Cultural District  
 Gullah Geechee Cultrual Heritage  
 Festivals & Events  
 Art of Old Town  
 Church of the Cross

## Marketing Channels & Formats

Facebook Videos  
 Instagram  
 TripAdvisor  
 Online Video  
 Forums & Blogs  
 Pinterest  
 Earned Media (Print/Digital)

## “Experiences are Greater than Things.” Their Path to Purchase



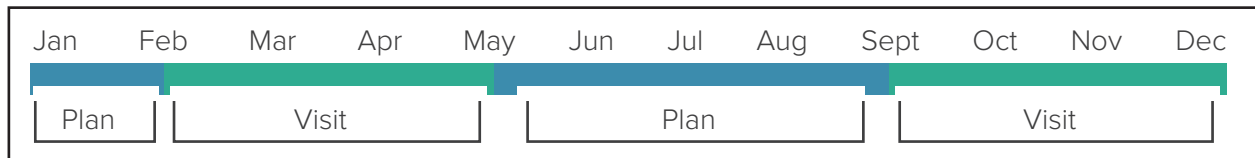


# Culinary



## Culinary Travel Objective:

Be immersed in a new destination (or an old favorite) by exploring the pursuit of unique and memorable culinary experiences.




## Travel Habits




## Who They Are

  
Values  
Authenticity

  
Seeking an  
Immersive  
Experience

  
Spontaneous  
& Social

  
Unconventional

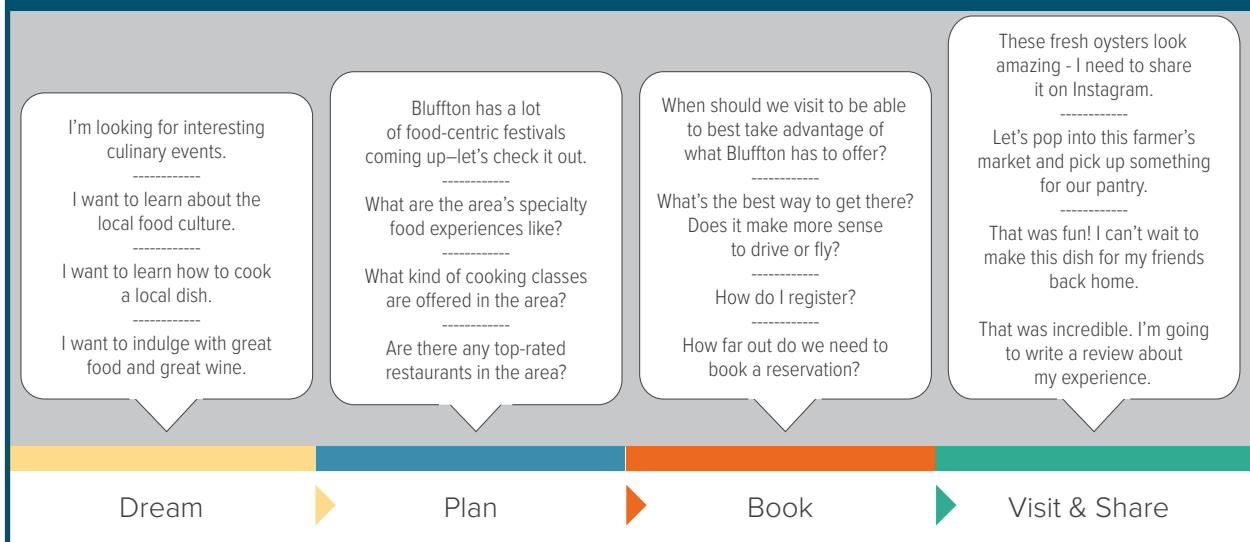
## Preferred Activities & Attractions

Cooking Classes  
Food Tours  
Wine, Beer and Food Festivals  
Specialty Dining Experiences  
May River Oyster Roasts

## Marketing Channels & Formats

Facebook Videos  
Instagram  
TripAdvisor  
Forums & Blogs  
Pinterest

## “Experience Authentic, Local Cuisine.” Their Path to Purchase





# 2021-2022 Destination Marketing Plan



The Visitor & Convention Bureau will continue to position Bluffton as the ultimate escape filled with genuine experiences to explore. For those looking to travel and immerse themselves in a new vacation experience, Bluffton is where they will find historical traditions, culture, Gullah heritage, natural beauty and culinary delights.

Bluffton is a safety-first focused destination. With the development and implementation of the Path Forward Readiness Plan, we provided a consistent and evidence-based approach to protecting the health of our residents, workforce and visitors. This initiative has become a staple in our marketing efforts and is woven throughout the plan for 2021-2022.

In partnership with the Town of Bluffton and with our extensive customer research and detailed insight we have identified these key areas of interest that define Bluffton:

- Area “District” Designations including History, Cultural and Arts
- National Historic Register Designations including the Church of the Cross and Campbell Chapel AME
- Martin Family Park, Wright Family Park, Garvin-Garvey House and the Bluffton Oyster Company
- Gullah Geechee Cultural Heritage Corridor
- Palmetto Bluff / Montage
- Natural beauty / May River

### Target Audience:

- Affluent consumers visiting Bluffton for cultural and arts experiences, historic tours, shopping and culinary activities.
- New and repeat overnights to Bluffton and the region.
- Group Tour planners and their customers with interest in Southeastern destinations, particularly as a central location for hub and spoke coastal, historic, shopping, cultural, heritage, cuisine and environmental tours.

The Visitor & Convention Bureau invests in destination digital content management, qualified staff, content managers/editors and a professional, well-executed public relations and digital promotions program. These investments are key to operating a robust destination marketing program in today's competitive and cluttered travel communications environment. This aspect of our work has become increasingly important as new communications channels emerge and evolve to give consumers more choices, more channels and more content.

As the Town of Bluffton's Designated Marketing Organization (DMO) we are committed to the following:

- Supporting the destination's brand position throughout all marketing programs.
- Increasing overnight visitation within Bluffton
- Increasing visitor expenditures to Bluffton attractions, retail and dining facilities. Thus increasing Bluffton and Bluffton's attraction, hospitality and sales taxes collected.

In addition, we will continue to provide a powerful set of services and award-winning strategic marketing solutions that will drive measurable results.

# Digital Marketing Plan

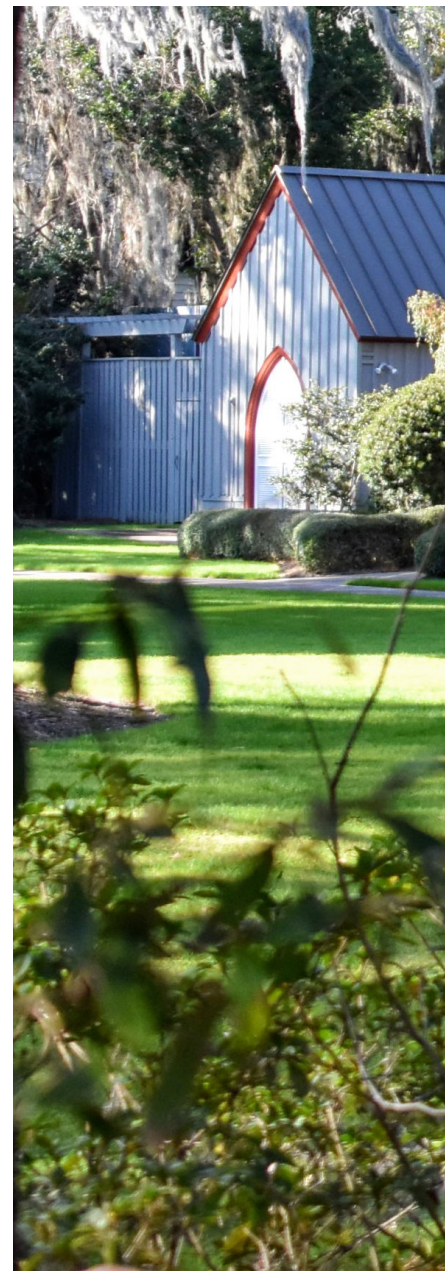
During 2020, Bluffton remained top of mind due to early on strategic adjustments to our media efforts with a “heavy up” approach to immersive content and recall of favorite memories. During COVID-19, while lockdown and quarantines varied state to state and beyond, our content served as a source of inspiration, enabling people to dream about their next getaway and reminisce fondly on past experiences. As people become more positive about and eager to travel again this year, Bluffton is perfectly positioned to appeal to leisure travelers. Continuing to build on the strong digital connection we have established and focusing on health and safety, Bluffton is an ideal destination for people planning a trip.

By examining trends for our key audience personas, we are able to deliver targeted, strategic messaging that answers the questions travelers are asking and responds to their needs, concerns, and priorities. Continuing to focus on and optimize high-quality content—copy, photography, user-generated content (UGC) and also incorporating new videos—will result in more partner referrals, higher engagement metrics, better brand awareness, positive sentiment, and increased conversions.

Paid digital media and social will drive our content initiatives this coming fiscal year, amplifying our content and delivering it to captive audiences. Strategic Search Engine Optimization (SEO) ensures our product features prominently in search results, with each element optimized based on best practices and search data.

## Placement Strategies

Given its ability to offer cost-efficient messaging across geographic and lifestyle-focused segments, digital media will continue to be the primary channel for Bluffton’s 2021-2022 strategy. With a key objective of growing partner referrals, preference will be given to Search Engine Marketing (SEM) and placements that skew towards our primary audience: the decision makers and vacation planners of the household. When planning 2021-2022 placements, previous performance will be considered to ensure optimal reach, relevancy, and results.







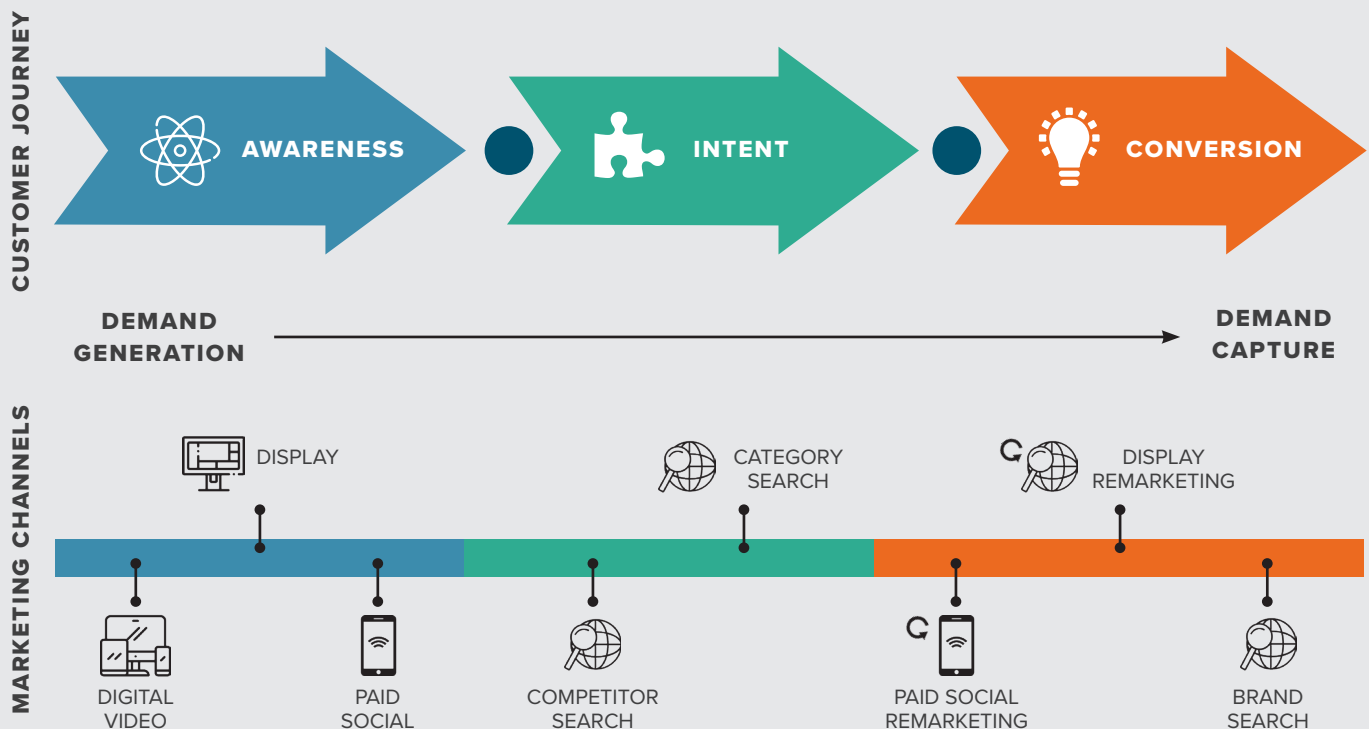


# Search Engine Marketing (SEM)

In order to capitalize on its ability to help expand and broaden organic keyword rankings, the Visitor & Convention Bureau will continue to build on the strategic SEM program into 2021-2022 for Bluffton. This will include a list of keywords that best align with Bluffton's target visitor and experiences.

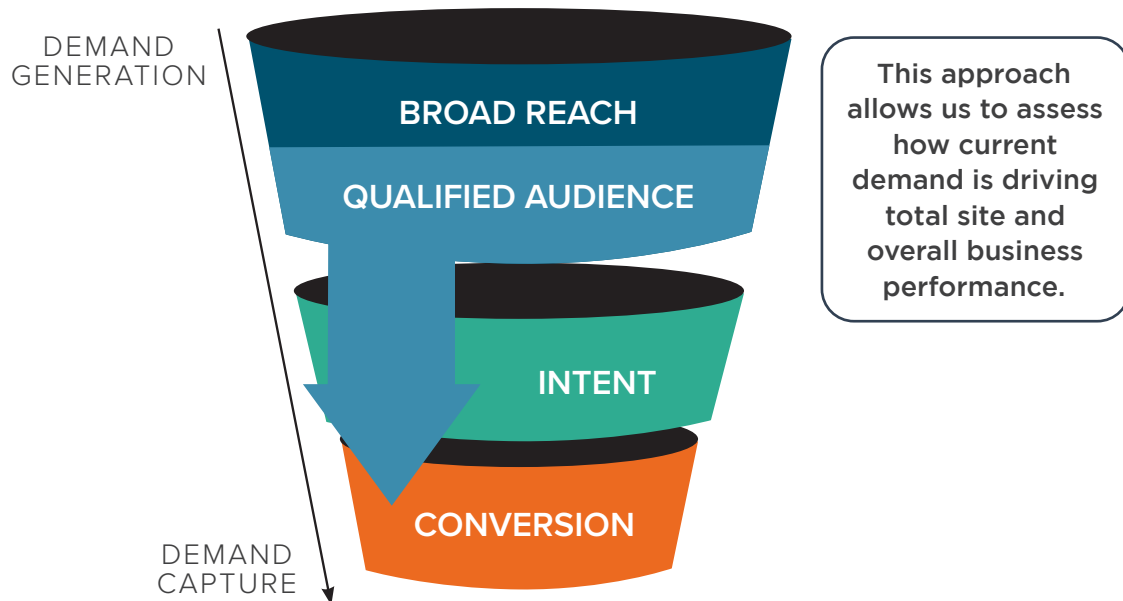


## Audience Targeting with Digital Media

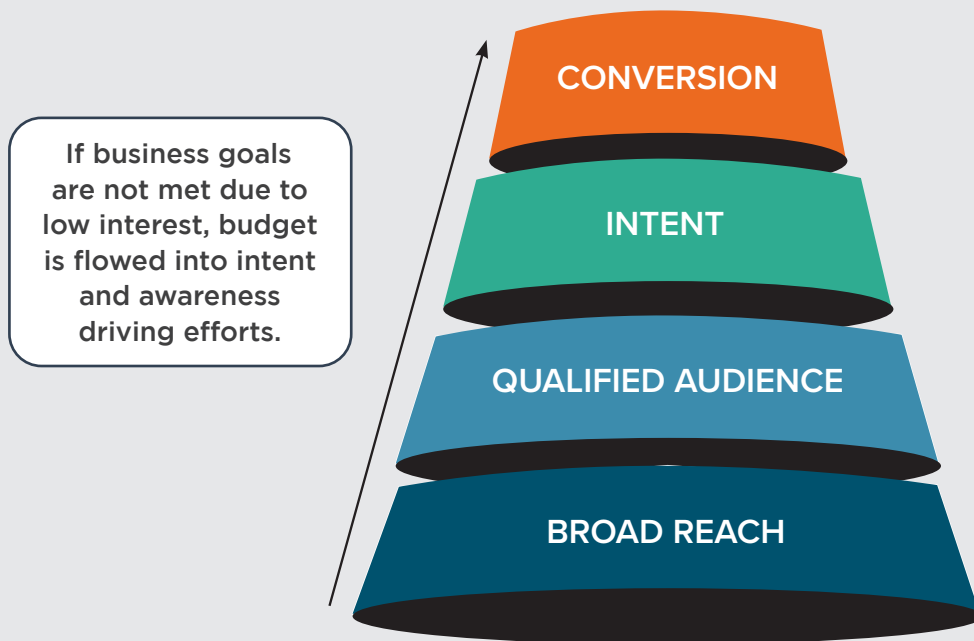




## The Consumer Journey



## Media Budget



# Digital Media

The ultimate goal of the 2021-2022 digital marketing plan is to directly increase the demand to community businesses. To achieve this, marketing efforts will work to influence consumers to visit the new independent Bluffton website.

Core goals will be aligned with the below tactics, targeted towards our key audiences. This approach will reach new users who are not yet aware of Bluffton and its unique offerings, as well as re-engage those who are already familiar with our marketing campaigns and website. With this strategic structure established, we will further refine the plan to clarify channels, key metrics, messaging, and consumer mindset against each phase of the consumer journey as seen below:

## Targeting

Leveraging a strategic mix of targeting methods will assist in identifying and reaching the most qualified users. Bids will also be adjusted within search to ensure we serve ads to the same qualified users. Both first- and second-party data will be used in creating sophisticated targeting for Bluffton.

## Awareness Phase

Digital video continues to be an integral tool in attracting and connecting with our audiences while showcasing the beauty and amenities of Bluffton. We will focus on our key areas of interest for Bluffton capturing details of each and sharing these across our channels including nature, historic, cultural and arts districts and assets in those areas.

To build awareness at the top of the funnel in 2021-2022, the Explore Bluffton video series, will be implemented predominantly across YouTube—the second-largest search engine in the world, with a network that reaches more than 90% of total internet users. To increase reach, video will also be utilized across Facebook Video, Instagram, and Instagram Stories. In addition, prospecting display ads will be used within the Google Display Network (GDN), to entice users to visit the website.







### YouTube Advertising

Utilized via YouTube Advertising as video pre-roll

- Video is skippable after the first 5 seconds and you are only charged if the user watches the complete video (>30 seconds) or clicks through to the website, whichever occurs first.
- Cost per view (CPV) to a targeted audience is typically between \$0.02 to \$0.04 making this channel wide-reaching and cost-effective.



### Instagram Stories:

15 Seconds or Less Videos  
Utilize unique assets

- Plays within feed, along with images and videos shared by consumers' friends, family, and other Instagram accounts they follow.
- Stories' ads provide a full-screen immersive experience with the goal to drive interest and traffic to the website.



### Facebook Network

(Including Instagram):  
15 Seconds or Less Videos

- Utilized via Facebook.
- Auto plays as users scroll through their newsfeeds.
- Can be purchased on a cost-per-click basis at an efficient price (around \$1), or on a cost-per-10-second view.



### Awareness Key Metrics

When determining the success of the Awareness Phase, metrics indicating an increase in demand and interest will be monitored. Over a longer period, we expect to see increases in volume and performance in lower funnel initiatives. Awareness efforts will target all devices with a mobile prioritization as the majority of consumers are in this phase.

### Prospecting Display

Utilized via the Google Display Network

- Appears within web content to qualified users.
- Purchased on a cost-per-click basis at an efficient price to drive interest and users to the website for future remarketing.



## Intent Phase

The primary goal of the Intent Phase is to foster consumers who have previously expressed an interest in visiting Bluffton.

Along with display ads we will extend reach through paid social within Facebook and Instagram. We only purchase media based on a cost-per-click basis to help mitigate fraud and limited viewability often seen in the industry.

Prospecting and Native Display Banners Partners:



### Audience Targeting

- Affinity Audiences
- In-Market Audiences
- Custom Affinity
- Custom Intent
- Similar to/Lookalike Audiences
- Demographics
- Geography

## WHAT IS THE Google Display Network?



Text Ads on websites



Image Ads on websites



Video Ads on websites



Ads on Mobile Websites



## Non-Branded Search

When cultivating consumer interest, non-branded search targeting category and competitor keywords allow us to raise our hand as a viable option. Similar to display, all search media is purchased on a cost-per-click basis which allows us to cost-effectively serve ads to drive future return on our search media spend.

	OVERVIEW	SAMPLE AD GROUPS
<b>CATEGORY SEARCH</b>	Themed ad groups and keywords around categories that target a consumer researching related types of vacations.	<ul style="list-style-type: none"> <li>• Family vacation</li> <li>• History, arts, cultural vacation</li> <li>• Couples vacation</li> <li>• Weekend getaway</li> </ul>
<b>COMPETITOR SEARCH</b>	To drive purely incremental traffic, we will create competitor targeted campaigns to help capture demand from those researching competition.	<ul style="list-style-type: none"> <li>• Savannah</li> <li>• Beaufort</li> <li>• Charleston</li> </ul>



### Intent Key Metrics

Intent advertising is also measured against awareness and demand to capture specific metrics that indicate success at both the top and bottom of the funnel.

- Website visitation and engagement
- Percentage of returning users
- Assisted conversions
- Link-outs to partners

### **Conversion Phase**

To capture the demand generated and cultivated through awareness and engagement, digital efforts will rely on the proven tactics of Remarketing and Branded Search.

### **Remarketing**

Remarketing is used to reinforce Bluffton as the perfect vacation destination by serving ads to those who have visited the Bluffton website.

For increased relevance, people who have visited the landing pages from all sources can be sorted into lists so that secondary messaging can be shown to them based on their interest on the page, and where they navigate to next. They can be shown applicable display ads from that original visit to entice them to return for more information or to click on partner links. Users to the website will also be shown display ads for seasonal events.

### **Branded Search**

Branded search is the most fundamental digital channel and provides a foundation for nearly all digital marketing initiatives.

### **Key Benefit**

Brand Search ensures consumers are exposed to the most current offer. It also helps capture all demand and limits erosion to competitors. With branded search ads, you can control the message and highlight attributes seasonally, geographically and by keywords.







# Search Engine Optimization

In 2020, organic traffic for the Bluffton microsite of hiltonheadisland.org accumulated over 37,000 organic visitors, which was 42% of all traffic to Bluffton pages in 2020. Organic traffic to the /Bluffton page increased by 36% when compared to 2019. Search engines continued to drive qualified visitors to the site as indicated by high engagement metrics including 5% more time spent on website, and the second highest goal conversion rate at 24%.

All SEO strategies for 2021-2022 will focus both on improving the visibility of the Bluffton website within both search engines and social networks for branded key phrases and emerging search queries, with the intention of increasing awareness of Bluffton as a vacation destination.

**37K+** = **42%**  
organic visitors      of all traffic

**↑ 36%**  
compared to 2019

The SEO strategy can be broken down into five core areas:

- 1. Technical SEO:** Ongoing technical audits and comprehensive reviews of the website to ensure content on the website remains crawlable and indexable by search engines.
- 2. Content Creation and Optimization:** Identify target keywords for content and blog production, and regularly highlight optimization opportunities for existing content to ensure relevance for search engines.

With the growing popularity of voice search, search engines are becoming better at matching a searcher's intent to the content they show in search results. In 2021-2022, an SEO focus will include strengthening contextual signals sent to search engines for the content on the website through:

- Internal links that create content clusters
- External links
- Structured data (schema)
- Ensuring existing and new content answers questions and solves problems

- 3. Building a Foundation of Authoritative Referrals:** Links to a site and citations continue to send strong signals to search engines that a website is authoritative on a particular topic and should rank well for searches. There will be campaigns to identify and attract high quality links from high authority sites, along with sharing of content through influencer outreach and a targeted social media strategy.



**4. Local SEO:** Google My Business (GMB) continues to influence user behavior in organic search results with additional service categories, offers, products and additional features that enable users to interact with business information outside the website. In 2021-2022, optimizing and taking advantage of new GMB features where relevant will ensure users interest is captured both on and off site.

**5. Identifying New Opportunities:** A significant component of the SEO program will be research to find new opportunities for content that, once indexed by search engines, will drive qualified searchers to the website. This research will focus on finding popular search queries that people perform when considering a vacation, trip or activity, and where Bluffton would meet the needs of those travelers. This research will be applied to new content creation and to existing content where optimizations can be implemented.

## Social Media

The social media landscape continues to be a “pay to play” space. Each newsfeed prioritizes paid advertisements and boosted content over organic content posted by brands. This means our approach to Bluffton’s content creation and measurements needs to adjust.

Strategically, this means:

- Placing a higher value on the quality of the traffic we create for the Bluffton website, in addition to the quantity.
- Continuing a paid social strategy for Bluffton-specific posts driving traffic to the Bluffton website.
- Integrating our paid and organic social efforts, ensuring content boosting on Facebook when budget permits.

These are the channels that best support Bluffton’s goals and will continue to be our focus for 2021-2022:



With different video messages and varying lengths, the videos can be targeted at specific audiences to increase awareness and drive traffic to the site using a Trueview for Action Overlay.



Facebook is our primary traffic source and we do not see this changing. Our approach to Facebook is to incorporate a range of content, focusing on Bluffton-specific blog articles, user-generated content shared by our locals and guests, co-op partnerships, one-off and on-going events and planned activities like tours in the Bluffton. In 2021-2022, we will focus on sharing partner content directly from the partner’s Facebook page, pushing traffic to their social accounts, as well as pages on the Bluffton website that link directly to the partner’s page.



Instagram’s strategy will continue to focus on curating user-generated content from talented guests and locals to support Bluffton’s messaging. Our biggest push on this channel will be to engage in two way conversations with our followers, to encourage them to mention our channel in their owned content, and to promote our #LoveBlufftonSC hashtag. We will also focus on curating a more aesthetically-consistent feed, using warm photo filters that portray the sunny, Southern vibe of the Lowcountry.





Our 2021-2022 Twitter strategy continues to focus on channel growth and maintaining our higher-than-average engagement rate. Content shared on this channel will be a mix of user-generated content, blog posts, links to the website, as well as local news, accolades, and events.



With the launch of the independent website, VisitBluffton.org, we can create our Pinterest channel to house relevant information linked back to our website content and blogs (which will push partner content).



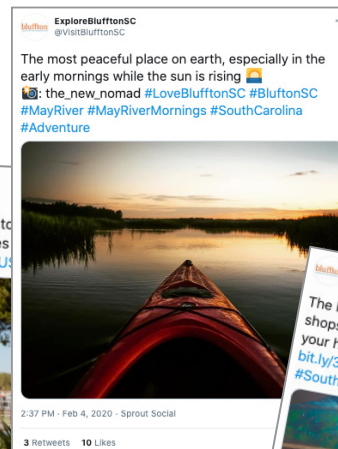
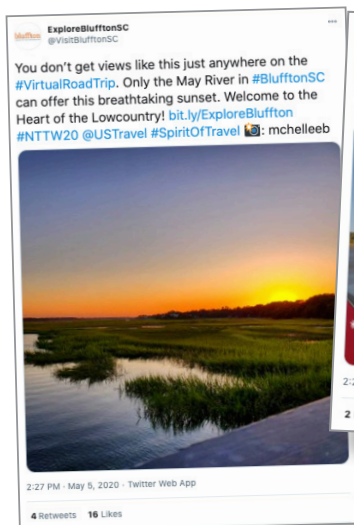
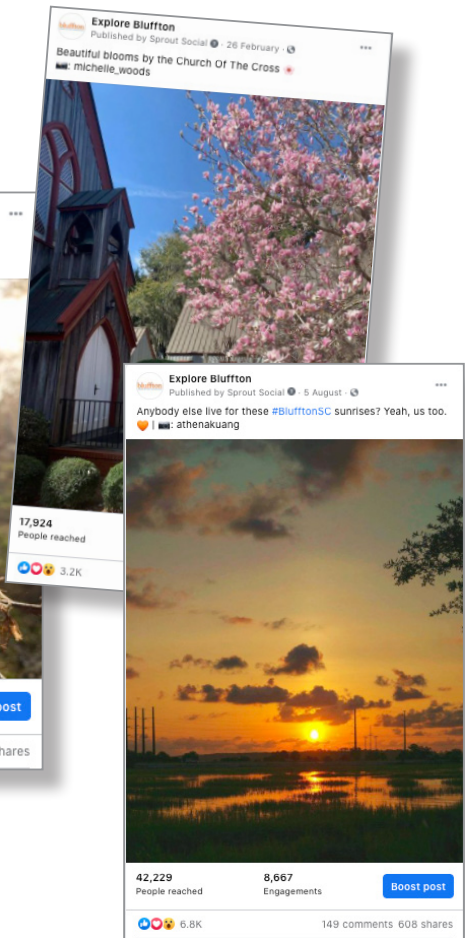
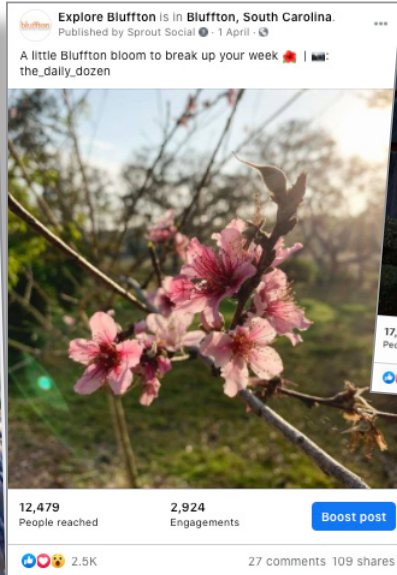
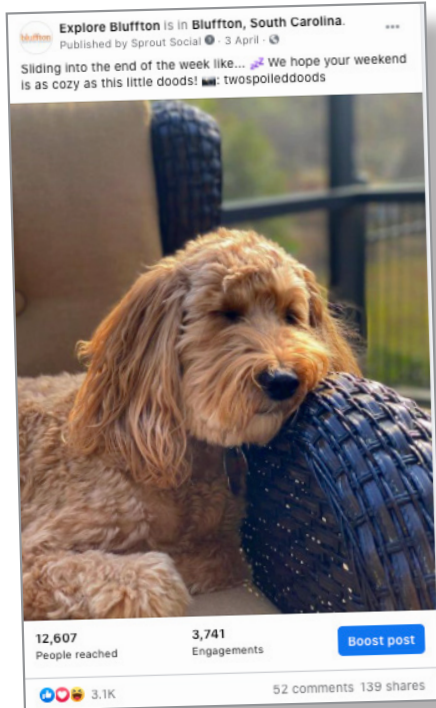
Spotify is a new terrain for Bluffton we will explore in 2021-2022. We will create tailored scripts written to pique the interest of our core audiences. Podcasts are selected based on relevant interests and read by the podcast hosts to reach our audio-inclined audiences.



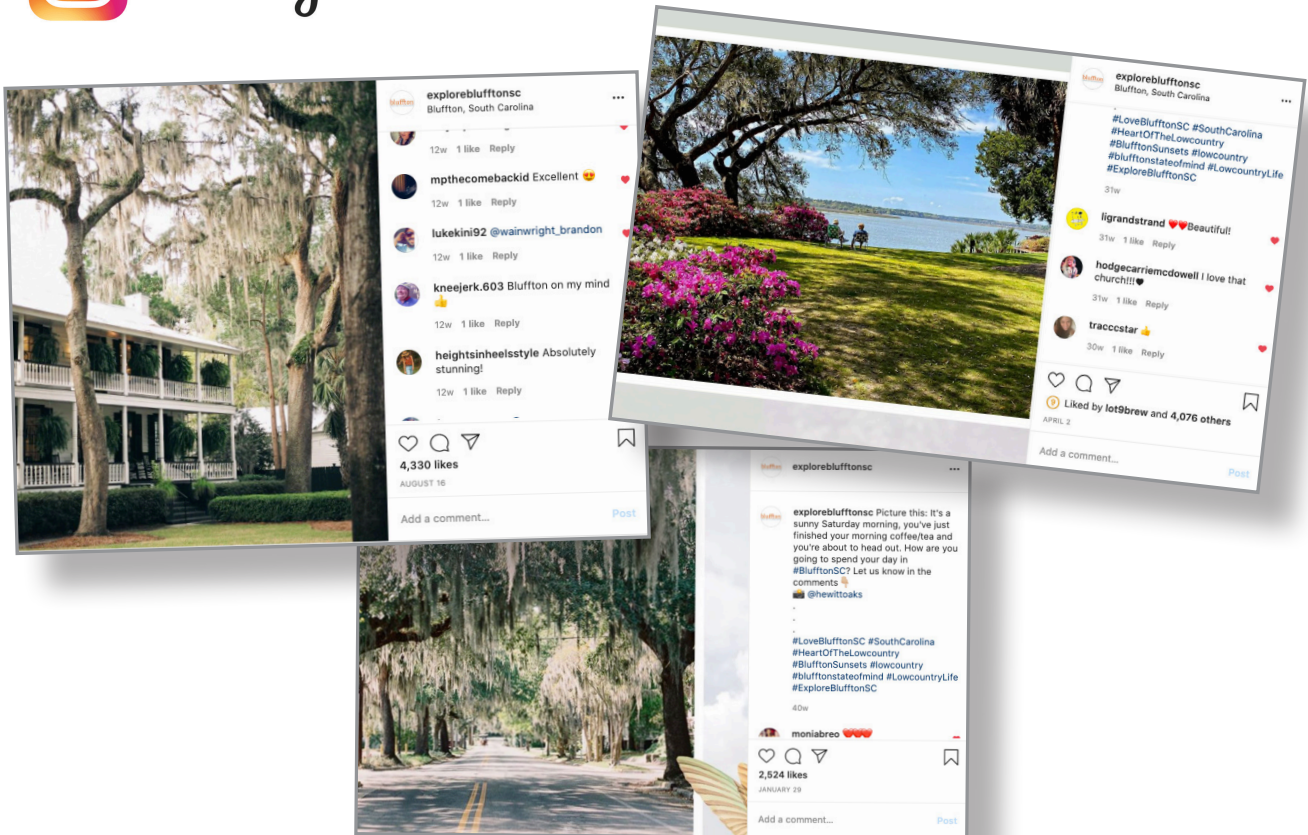


# Top Social Posts for 2020

## facebook









## Blog

We will look to continually evaluate our content calendar throughout the year to adjust as needed based on travel trends and sentiment. This will ensure that we are consistently writing about the most in-demand, trending, and searchable topics, informed by the domestic and international landscape. After experimenting with user-informed blog posts in 2020 with great success, we will also ensure to offer ample opportunities for our audience to weigh in on what they want to see and also contribute their own thoughts to our blogs. Our followers love to see themselves recognized in our content and we will lean into that as a tactic to increase readership, continue to build rapport and to entice new visitors by sharing perspectives of our most engaged fans.

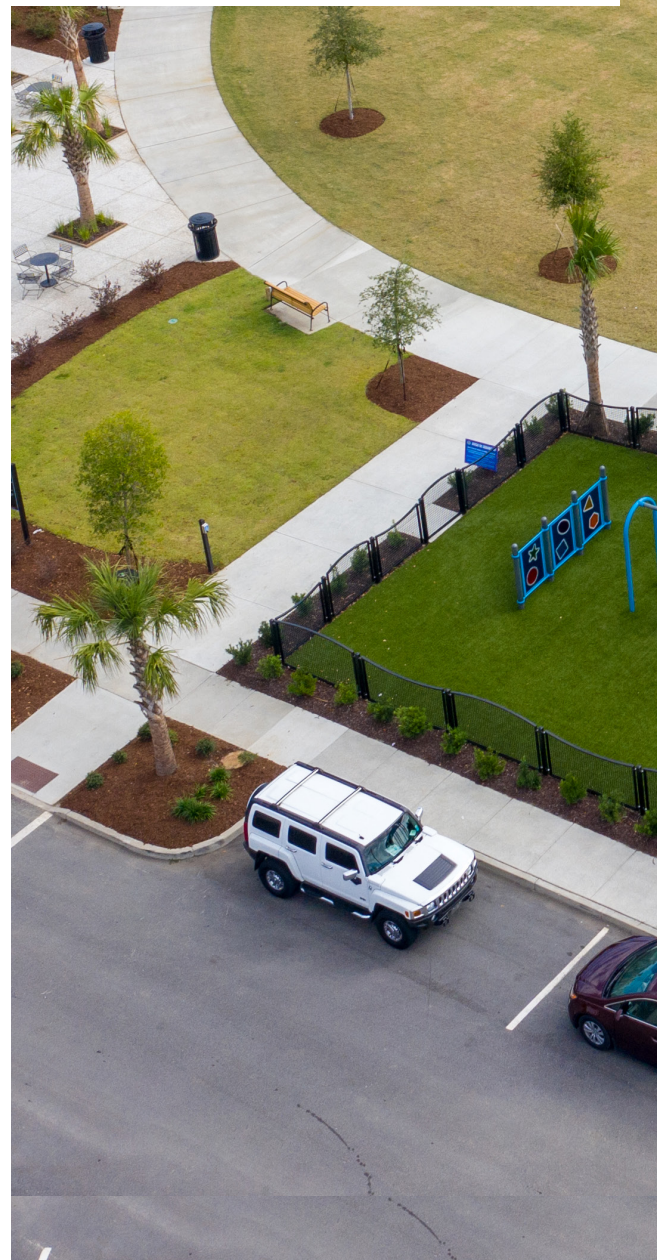
In 2020 we developed a strong bank of evergreen content for our audience. In 2021-2022 we will focus on topical content for specific audiences. Formats we will create and test include:

- Long-form, editorial pieces
- Recipes and “insider tips” from partner restaurants, hotels and attractions
- Quizzes
- Persona-specific itineraries
- Top listicles which can be repurposed across social, in bite-sized pieces
- Pop-culture related content that will perform well via search and directly ties back to the destination

## Crowdriff

We have informed our content calendar with

Google search trend data and have assessed top-performing historical content that speaks to the interests and needs of our audience. Curation of in-the-moment, dynamic, and beautiful user-generated content via Crowdriff is always ongoing. Images sourced from Crowdriff allow us to consistently produce high-performing content which has helped our Instagram account grow by nearly 25% year-over-year allowing us to have an engagement rate of between double and triple that of destination industry standard. Curated, topical Crowdriff galleries allow us to show a visitor perspective across our website and in blogs, instilling trust and desire in prospective visitors.









# Paid Social Media Strategy

To continue supporting our goal of establishing the credibility of our Facebook and Instagram pages, as well as our website, the paid social media strategy will focus on driving this momentum forward. To do this, paid social tactics will be implemented:

- Facebook/Instagram Traffic Campaigns (25%)
- Facebook Boosted Posts (15%)
- Instagram Boosted Posts (15%)
- Facebook Page Growth (25%)
- Instagram Follower Growth (10%)
- Twitter Follower Growth (10%)

## Targeting

The paid tactics and targeting will vary depending on what part of the funnel the user is in.

## Awareness Phase

When determining success for awareness-based campaigns, we will look at metrics indicating that interest and social media presence is increasing. Over a longer period, we expect to see increases in volume and performance in lower funnel initiatives.

- Reach / Frequency
- View-Influenced Visits
- Social Media Platform Growth
- Engagement Rates

## Intent Phase

During the intent phase, we will engage users who are more likely to follow Bluffton's Facebook, Instagram or Twitter accounts, as well as drive qualified traffic to the website.

These planning-stage audiences will be created utilizing retargeting efforts based on consumers who have engaged with our awareness phase advertising initiatives, and those who have visited the website. We will additionally continue to target users based off of their interests, behaviors, demographics, and geographics.

Generating Facebook likes, Instagram followers, Twitter followers and driving traffic to content-rich pages of the website will be the focus of this stage of the customer journey and tactics will include:

- Facebook Page Like/Growth Ads
- Instagram Followers/Growth Ads
- Twitter Followers/Growth Ads
- Traffic/Always On Ads





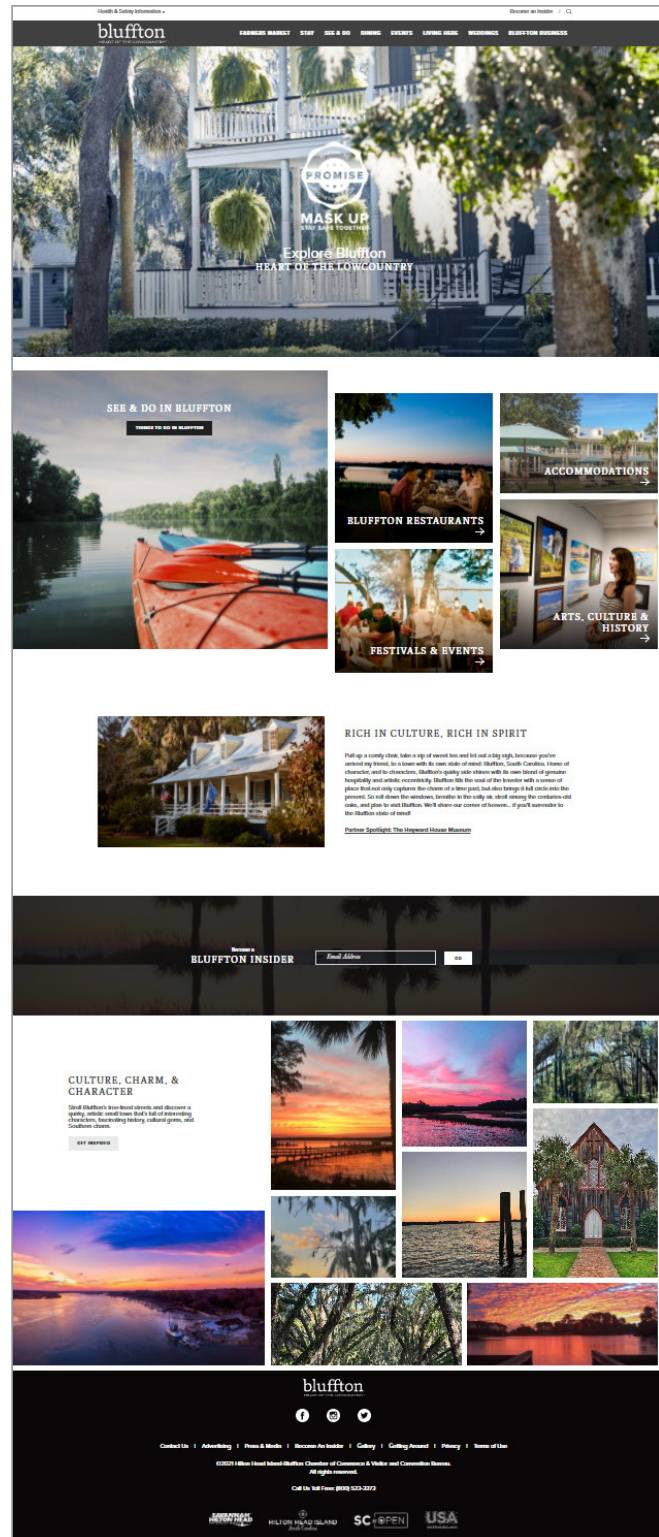
## Destination Website

When appropriate, traffic will be driven back to Bluffton's new, independent website. This standalone site will help us achieve stronger results and higher conversion rates.

The VisitBluffton.org website is the single most important touchpoint next to the destination experience itself. A responsive web platform, engaging content and overall creative should virtually transport a visitor to Bluffton.

In 2021-2022, Bluffton's digital marketing plan and website initiatives will continue to build on the solid foundation established to further enhance the visitor experience. By utilizing our key personas, we are able to deliver targeted, strategic messaging to more niche groups of new and repeat visitors. Continuing to focus on and optimizing high-quality content copy, photography and videos that are engaging, entertaining and conversion-driven will result in increased partner referrals, higher engagement metrics and overall conversions.

Evolving our content and social efforts to include more "insider" content - Q&As with prominent Bluffton business owners and locals and implementing richer user-generated content, offers visitors a more intimate glimpse at a Bluffton getaway. Using paid media and social media to help drive our content will amplify our message and ensure it is being seen by the right people at the right time, across the board, while SEO will ensure that visitors are able to find the information they need quickly and efficiently.



# Group Sales & Tradeshows

Bluffton continues to grow and position itself as a group destination more so now than at any point in the last decade. The variety and quality of experiences for group visitors has never been more diverse, offering a robust arts, historical and cultural scene, with growing culinary experiences. The Visitor & Convention Bureau will continue to promote Bluffton while attending travel tradeshows virtually and in-person.

Military continues to be a focus for the Bluffton region. With close proximity to Parris Island, hosting out of town families and guests remains the ideal market for our focused service hotels. We will continue to build awareness of the Bluffton region inspiring these families to extend their visit or celebration, creating lasting, special memories.

## Group Tour

Group Tour remains an important market to maintain current and new relationships. Bluffton continues to be an attractive destination for a hub and spoke opportunity. With Savannah 40 miles away, Beaufort 30 miles and Charleston just under 2 hours, the Bluffton region is ideal for groups to stay in one location for up to a week and focus on day trips from one central area. We intend to draw group tour visitors by:

- Building relationships with tour operators through American Bus Association (ABA).
- Leveraging group tour.
- Expanding promotion of group experiences on our website.

## American Bus Association (ABA)

Tour operators, suppliers and exhibitors come together at the American Bus Association (ABA) Marketplace - the industry's premier business event. Marketplace is an active, vibrant forum for buyers and sellers. Marketplace offers a year's worth of sales meetings in one week and with legendary networking and social events, attendees turn conversations from the conference floor into long-term business relationships.

We will attend the ABA Marketplace and take advantage of up to 60 pre-scheduled appointments with pre-qualified operators to promote and sell the region.

## IMEX America

IMEX America hosts over 3,000 corporate, incentive, association and third-party planners.

The largest in the industry in North America, this Hosted Buyer Program qualifies and brings key buyers to the show covering travel and accommodations. This program guarantees thousands of highly qualified buyers from the association, corporate and agency sectors.

## South Carolina Society of Association Executives (SCSAE)

SCSAE's tradeshow is a one stop location for meeting and greeting with association CEOs/Executive Directors, Meeting Planners, Membership Directors, Communication Directors and Corporate Meeting Planners. Association professionals can meet with more than 70 exhibitors including hoteliers, convention centers, technology vendors and more.



### SportsTravel Magazine's TEAMS

TEAMS: Travel, Events and Management in Sports, is the world's leading conference and expo for the sports-event industry. TEAMS attracts more than 1,000 attendees including CEOs, executive directors and event managers from sports organizations as well as representatives from sports commissions and convention bureaus, corporate sponsors, event suppliers and other hospitality industry opinion leaders. TEAMS has helped define the sports-event and appointment-based tradeshow industries.



TRADESHOW	MARKET	DATES	LOCATION
SPORTS TRAVEL'S TEAMS EXPO	Sports	Sept. 27-30, 2021	Atlantic City, NJ
IMEX AMERICA	Corporate	Nov. 9-11, 2021	Las Vegas, NV
AMERICAN BUS ASSN.	Group Tour	Jan. 8-11, 2022	Grapevine, TX
SCSAE	State Assn	Jan. 20, 2022	Columbia, SC

*\*The following are examples of tradeshow we will look to attend in 2021-2022. As the landscape of meetings and groups continues to evolve we will look to evaluate these opportunities in real time and potentially add others if they are beneficial to the overall meetings and groups strategy.*

# Photography/Videography

As storytelling becomes increasingly important when promoting the destination, we will look to continue to build our asset library with photography and videos supporting the main pillars for marketing Bluffton. We will take a more seasonal approach to capturing content throughout the year as the seasons change. Building the asset library will provide us with additional content for use across all marketing efforts.

## Strategy:

- Capture Bluffton's new products and amenities including parks, cultural district and new neighborhoods
- Expand on the Explore Bluffton video series to use across website, social and digital channels
- Shoot in a high-level DPI format to create high quality images that will translate well into a variety of formats
- Capture engaging drone footage seasonally throughout the year









# Collateral & Fulfillment

The Visitor & Convention Bureau will develop and produce an Official Bluffton Vacation Planner. This print and digital publication will be our primary fulfillment piece and a comprehensive guide to what to see and do within Bluffton. It will be distributed via online and phone inquiries, to local businesses and to the Town of Bluffton.

In today's more visual world, telling a story through stunning photography and compelling content is an imperative component to the travel journey process. This "coffee table" piece allows our visitors to visualize their vacation and discover the destination, through this first touchpoint, the reason for our many accolades, ultimately imagining themselves here on vacation. In addition to working with a publisher, our in-house marketing staff provides the business directory, local photography, editorial content management, editorial review and proofreading for this asset.



**BRIDGETTE FRAZIER, CHEF B EATZ FOOD TRUCK AND DELICIOUSLY CULTURE CATERING**

*"Even when times are challenging, we can adapt. People always want good food!"*


Bridgette Frazier, a Bluffton native, learned to cook in her grandmother Daisy Frazier's kitchen. After teaching school for 15 years, she realized her calling in cooking for others and opened Chef B Eatz Food Truck and Deliciously Culture.

A Gulfstream Frazier's grandmother taught her how to prepare authentic Gulfstream dishes like red rice, gumbo, and cold cakes. Her father, Oscar Frazier, the owner of a Bluffton barbecue joint, Oscar's BBQ, taught her the art of barbecue. She attended Le Cordon Bleu College of Culinary Arts in Florida and expanded her knowledge of techniques and cooking styles. Today, Frazier offers her customers local ingredients and local favorites alongside regional favorites like shrimp and grits and peach cobbler.

Frazier's red rice, an authentic Gulfstream dish of rice, tomatoes, onions, peppers and spices — with a little pork added — is one of her signature dishes. Most people are familiar with jambalaya, but her Gulfstream version combines orecina, tomatoes and spices for a distinctive blend.

With so much plentiful seafood in the area, Frazier uses fresh-off-the-boat crab in her Deviled Crab, based on an old family recipe. She serves gumbo fries topped with fried local shrimp and incorporates fresh local shrimp in hibachi bowls with fried rice, teriyaki chicken and sunny sauce. And she uses local oysters in rice porrito — "for porrito, as some people call it," she says.

"Even when times are challenging, we can adapt. People always want good food!"



**A WALK THROUGH BLUFFTON**

*This charming Lowcountry town is best explored on foot.*

By Linda Lerner



There may be no better way to experience the Lowcountry's gentle allure than with a leisurely stroll down Bluffton's centuries-old streets. Stately oaks dripping with lacy Spanish moss line the one square mile of Old Town Bluffton, where boutiques, restaurants and galleries stand side by side with historic cottages and grand homes, many dating to the early 1800s.

If a slow walk through a small Southern town is your idea of time well spent, join the Bluffton Walking Tour, which begins at the Heyward House Historic Center, an 1840s farmhouse-turned-museum that doubles as the town's welcome center.

Dissect Anne Heyward is a native Blufftonian who regularly guides history and architecture buffs on walking tours through her hometown.

Ambling along under the shade of lustrous palmettos, Heyward transports her visitors back to her town's beginnings in the early 1800s. Bluffton was a tiny village lounging on the banks of the May River, founded by folks eager to enjoy the breeze and escape the Lowcountry summer heat. Of Bluffton's 60 homes, churches and businesses, just 15 remained after Union forces razed the town in 1863.



**CHART YOUR COURSE • BLUFFTON**

**Fine Art and Fine Eats**

The eclectic cultural district of Bluffton is known as much for its vibrant arts scene as for its natural riverside beauty. Celebrate both in equal measure at the annual **Historic Bluffton Arts & Seafood Festival**. This week-long event serves up locally harvested seafood and decadent Lowcountry cuisine alongside rich history, culture and art. Don't miss the Streetfest, a juried fine art show featuring more than 100 artists from states, plus good food, music and Southern hospitality, join the festivities from October 16 - 24.

[blufftonartsandseafoodfestival.com](http://blufftonartsandseafoodfestival.com)

[HistoricBlufftonArtsandSeafoodFestival](http://HistoricBlufftonArtsandSeafoodFestival)

58 • 2021 OFFICIAL VACATION PLANNER



**Cozy Cuisine**

Savor scrumptious food with old-world Southern charm while dining outdoors on the porch or inside this cozy, restored 1890 cottage. Featuring sophisticated cuisine with a Lowcountry flair, The Cottage offers breakfast, lunch, dinner, Sunday brunch and tea, and serves up a variety of coastal favorites. The Cottage serves its own blends of May River Coffee Blenders, along with delicious award-winning desserts. Catering is available.

[thecottageinbluffton.com](http://thecottageinbluffton.com)  
843.753.0608  
#cottageinbluffton  
thecottageinbluffton

**The Heart of Bluffton**

The Heyward House, built in 1841, is located in the heart of Bluffton's Historic District and serves as the official welcome center for the town. The house is filled with interesting artifacts and furnishings from the 1850s to the 1920s. Walking tours of the Historic District are available.

[heywardhouse.org](http://heywardhouse.org)  
843.753.6293  
#heywardhouse



**Farmers Market**

Stock up on local produce and enjoy delicious food and drinks at the Market of Bluffton, 12 - 5pm.

**Bluffton's Historic District**

Bluffton's historic district is a charming area with a mix of historic and modern architecture. It is a great place to walk and enjoy the view.

**Bluffton's Historic District**

Bluffton's historic district is a charming area with a mix of historic and modern architecture. It is a great place to walk and enjoy the view.



# Research & Analytics

Research provides powerful information to evolve and perfect the Visitor & Convention Bureau's marketing strategy. Throughout the year we will continue to extract detailed reports and information that guides us in understanding our visitors. These research programs will lead to marketing and advertising initiatives aimed at growing the tourism industry for Bluffton. The following programs will be ongoing:

- Maintenance of ThinkBluffton.org, the Chamber's online economic metrics portal.
- Smith Travel Research (STR) weekly and monthly reports which measures lodging occupancy, average room rates, room demand and RevPAR for hotels only. Includes monthly comparative report with competitive destinations.
- DestiMetrics monthly Home & Villa lodging reports on occupancy, average room rates, RevPAR and six month forward booking pace reports. Two-source DestiMetrics report crunches backend STR hotel data with DestiMetrics backend home and villa data to produce a monthly destination report on total destination accommodations tax paying occupancy, average room rates and RevPAR.
- Collaborate with College of Charleston Office of Tourism Analysis and the University of South Carolina Beaufort along with ensure details of our Google Analytics and social media metrics to provide regular performance updates.
- Subscription to the U.S. Travel Association's (USTA) Travel Monitor Program and related reports.

These consistent research details will provide insights to produce quarterly and annual reports that provide a health check into tourism for the Town of Bluffton\*.

On a quarterly basis the DMO will provide the Town with,

- Number of website visits
- Number of clicks throughs made to area businesses (conversions)
- Occupancy rate
- Revenue Per Available Room (RevPAR)
- Number related to mail fulfillment
- Industry awards received for marketing and public relations
- Events held and participation in events by Chamber members
- Update on public relations efforts to include; number of media impressions/ dollar equivalent
- Social Media Reports

Working toward annual insights related to tourism provided through the following reports,

- Visitor Profile Study
- Economic Impact Study

\*All metrics and reports mentioned above are based upon information available. Reporting will flex and grow as more information is gathered and/ or becomes available.



# Appendix Reports

Bluffton Social Report 2020

Bluffton Website & Online  
Marketing Performance 2020





## 2020 Overview

Bluffton, SC launched its own social media accounts on Facebook, Instagram, and Twitter in July of 2019. In 2020, we built on 2019's launch success by focusing on increasing impressions for brand awareness and follower growth, as well as fostering engagement among our audience.

We also made strides to better align with Bluffton, SC's content pillars: History, Arts, Cultural, May River, Culinary, and Natural Beauty. We found natural beauty photography outperforms any other kind of content, and are continuously finding ways to showcase our culinary scene, historic landmarks, art scene, and culture in ways that resonate with our audience (i.e. by sharing photos that also feature natural beauty alongside other pillars or by using UGC).

In Q3 and particularly Q4 of 2020, as Covid-19 restrictions loosened, we also implemented new tactics like using more direct CTAs to book your Bluffton getaway and posting Instagram Stories with CTAs to click the link in our bio. We will continue to capitalize on these engagement-boosting tactics in 2021.

2020 saw impressive growth for our channels, with Bluffton remaining #1 for audience growth throughout the year.



Jan 1, 2020 - Dec 31, 2020

## Executive Summary



### Wins

- Bluffton consistently maintains the fastest growing cross-channel audience in our competitor landscape.
- Facebook is our fastest growing platform, bringing in 10,266 new followers in 2020.
- Bluffton maintained a 5.96% engagement rate on Facebook (vs. 0.09% industry average and a 0.52% competitor average) throughout 2020.



### Innovation

- We implemented Instagram Stories in 2020 using a combination of UGC and original engagement-boosting content like polls and question boxes. These posts reaped positive engagement and we'll continue to work them into our strategy.
- Instagram as a platform is an opportunity for us to reach the Gen X and Millennial audience. We will integrate tools like Instagram Guides and Reels to capitalize on this platform and audience.



### Challenges

- Twitter continues to be slow to grow, with our growth MoM remaining steady but much lower than our other channels. Our engagement rate remains above industry standards (0.42% vs. 0.045%), but with an audience of 625 people vs. 12k+ on Facebook, it's worth shifting our focus to other platforms.



### Key Learnings

- Consistent, frequent posting is key to capitalizing on our platform's algorithms from an organic perspective, and staying competitive with paid budgets is key for follower growth and engagement from a paid perspective.
- Posts that promote our partners and community perform well, and we can find more opportunities to collaborate and build brand awareness.

## Social Media Snapshot



### Followers

12,135

### Post Engagements

1,400,646



3,043

18,156



625

1,804

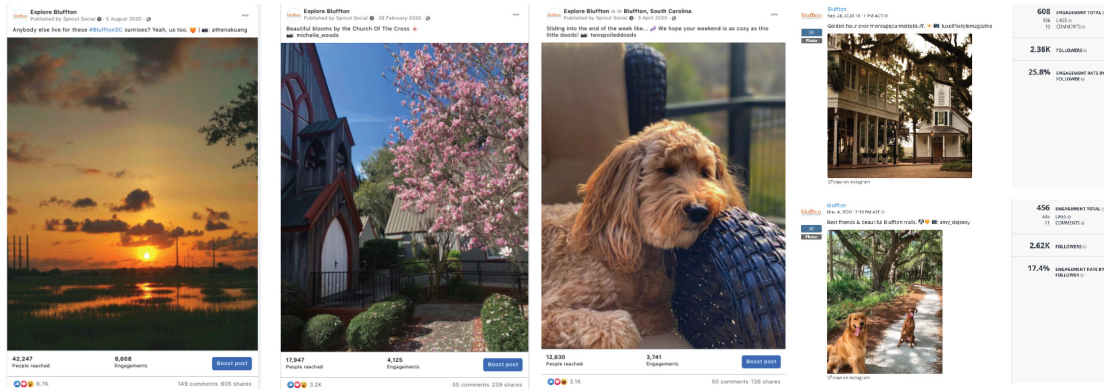
\*Due to Bluffton launching accounts in July 2019, we do not have YoY data to compare to.



Jan 1, 2020 - Dec 31, 2020

## Top Posts

In 2020, Facebook saw the most engagement per post out of all active social channels. Below is an example of the types of content that performs best for us (all of which is user-generated), including sunset and sunrise shots, florals and blooms, Bluffton landmarks, and dog photos.

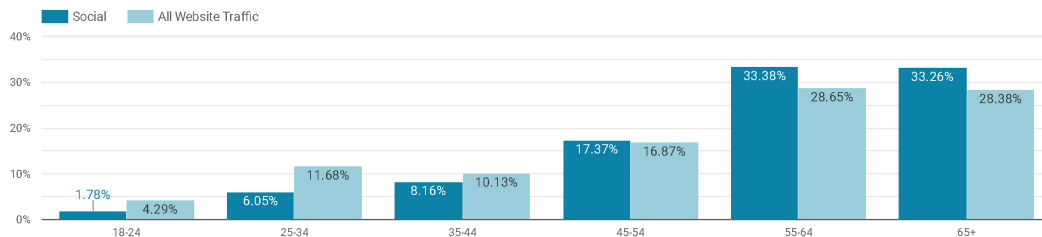


## Social Audience

Jan 1, 2020 - Dec 31, 2020

### Age

What are the ages of the users?



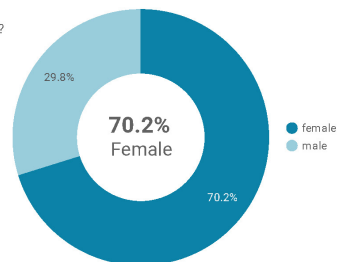
Bluffton's social media followers are primarily older adults (or Baby Boomers), with users age 55+ representing approximately 67% of our audience. This audience has grown since last year, where adults 55+ represented 55.5% of our audience.

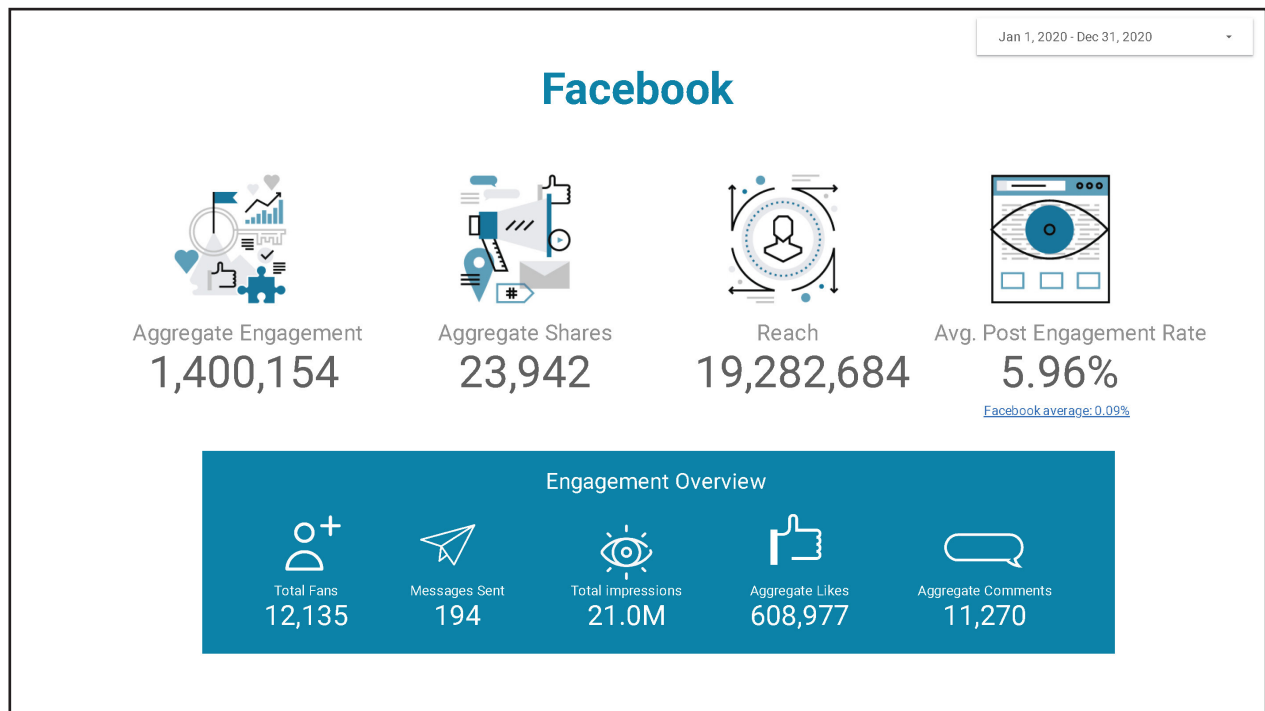
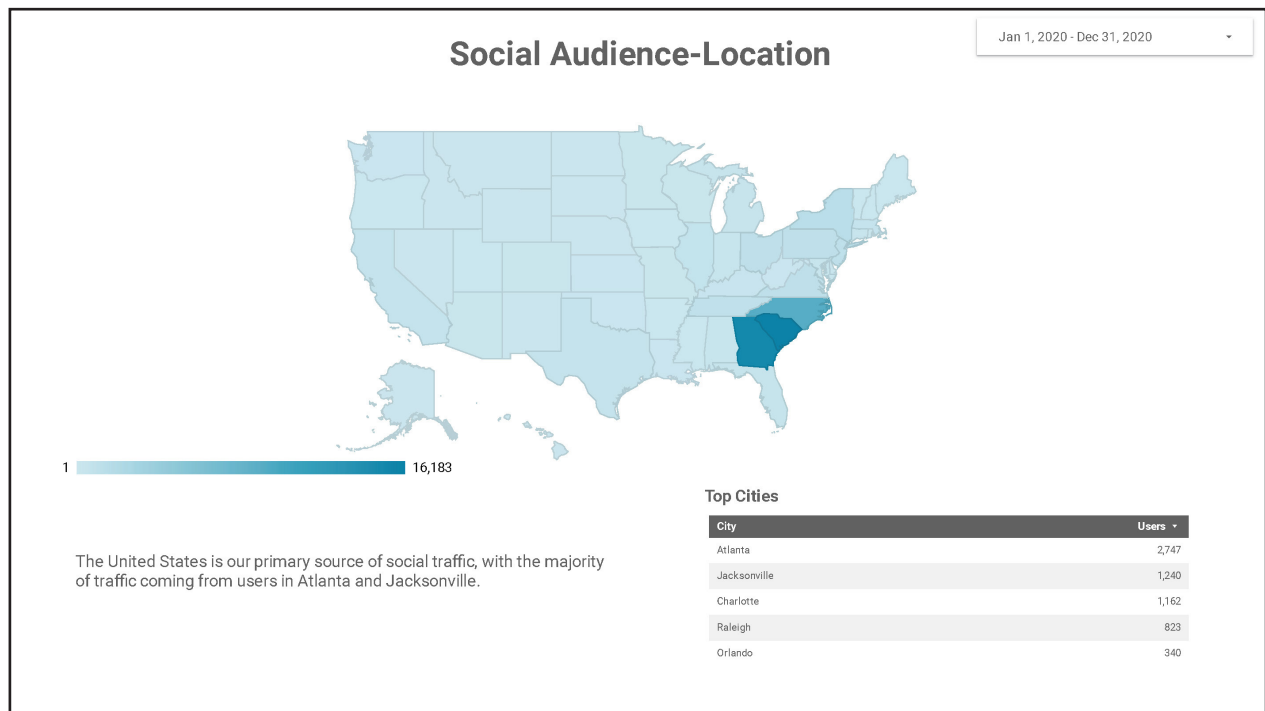
Our Gen Xer and Millennial audience is declining, with adults ages 35-54 making up 25.53% of our audience in 2020, compared to 35% in 2019.

Our audience leans female, with females making up 70% of our audience. This has grown since last year when females made up 60.5% of our audience.

### Gender

What is the gender of the users?







## Paid Facebook

Jan 1, 2020 - Dec 31, 2020

### Monthly Ad Spend

How did our paid campaigns perform in 2020

Campaign name	Campaign objective	Cost	Impressions	Total Reach	Results
300 Bluffton - Page Likes 2020	PAGE_LIKES	\$6,126	702,549	677,718	
300 Bluffton - Always On 2020	LINK_CLICKS	\$6,000	975,969	953,589	
300 Bluffton Instagram Engagement 2020	POST_ENGAGEMENT	\$5,100	732,534	726,945	
300 Bluffton - Facebook Engagement 2020	POST_ENGAGEMENT	\$4,800	1,684,308	1,667,838	

Grand total \$22,026 4,095,360 4,026,090

Total Cost (USD)  
**\$22,026.00**

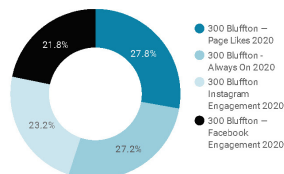
Paid Sessions  
**29,094**

Post Engagements  
**306,590**

Partner Clicks  
**3,172**

### Spend

How was the actual spend split between Campaigns?



### Insights

• In 2020, we focused our efforts on Engagement, as well as boosting UGC over owned assets. This initiative resulted in 306,590 Post Engagements from paid, and an overall **Engagement Rate of 5.97%** (vs. our competitor average of 0.52%).

• We gained 7,225 new followers, meaning 59.7% of our new followers came from paid ads.

## Facebook

Jan 1, 2020 - Dec 31, 2020

### Facebook Engagement

When are people liking, commenting on, and sharing our posts?



Total Fans <b>12,135</b>	Messages Sent <b>194</b>	Organic Impressions <b>615.2K</b>	Likes <b>101,780</b>	Comments <b>3,161</b>
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### Insights

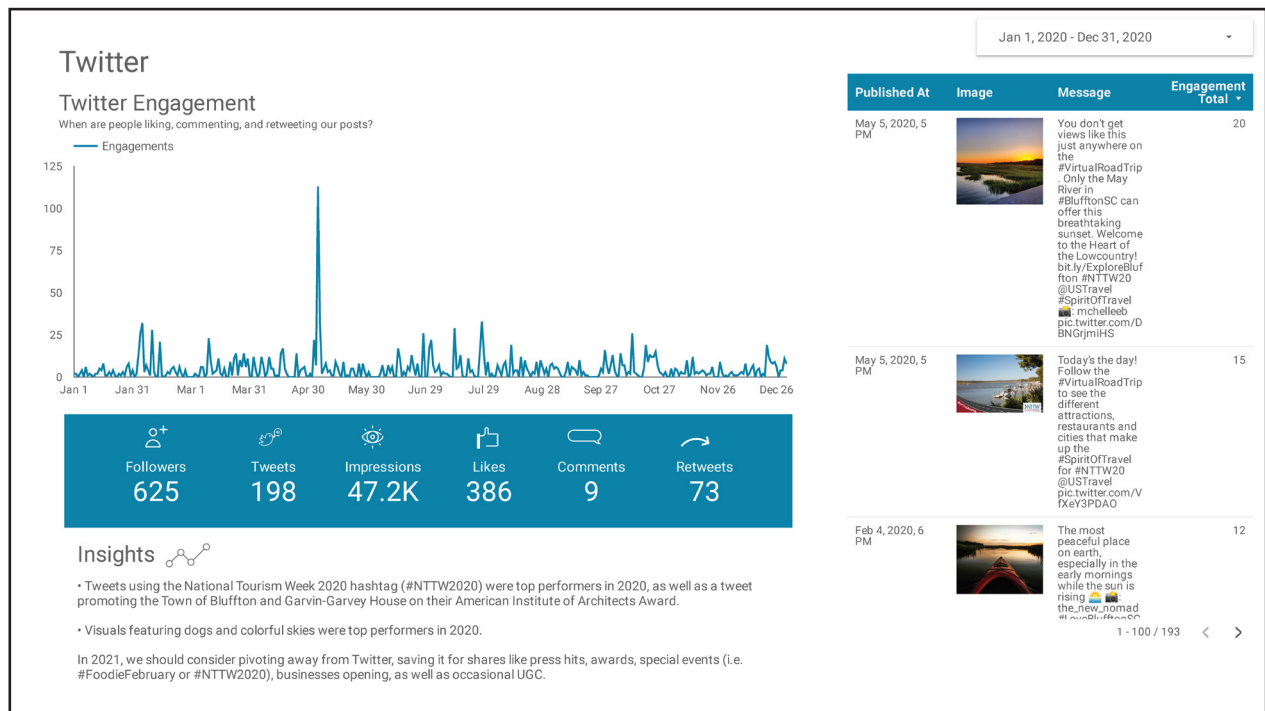
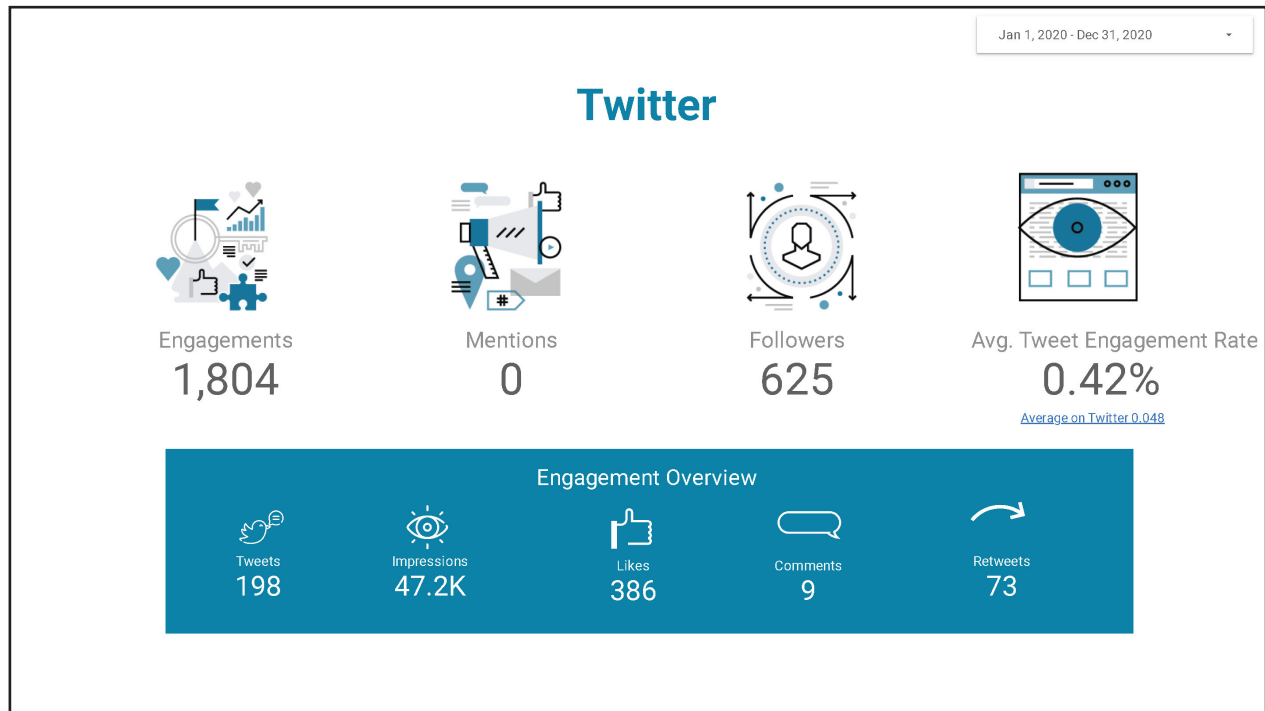
• In 2020, our engagement fluctuated with our Paid Social spend, particularly in May and June when Paid Ads were turned off. Our Engagements peaked in August, our biggest spend month of the year with the exception of March (which proved challenging due to Covid-19 restrictions starting).

• UGC is a top performer on Facebook, with natural beauty shots featuring sunsets, sunrises, blooms, palmettos, and Spanish Moss consistently reaping the best results. Dog content also performs well, so we should continue to prioritize it when we receive UGC featuring dogs that aligns with our pillars.

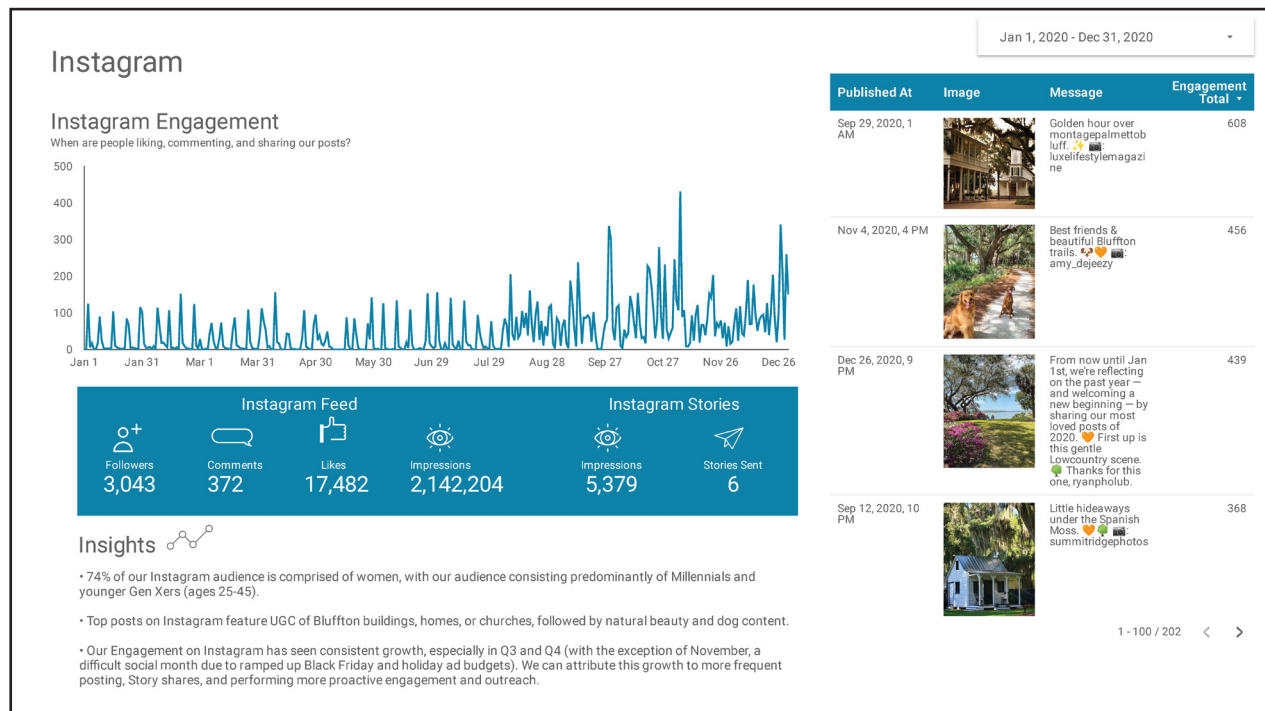
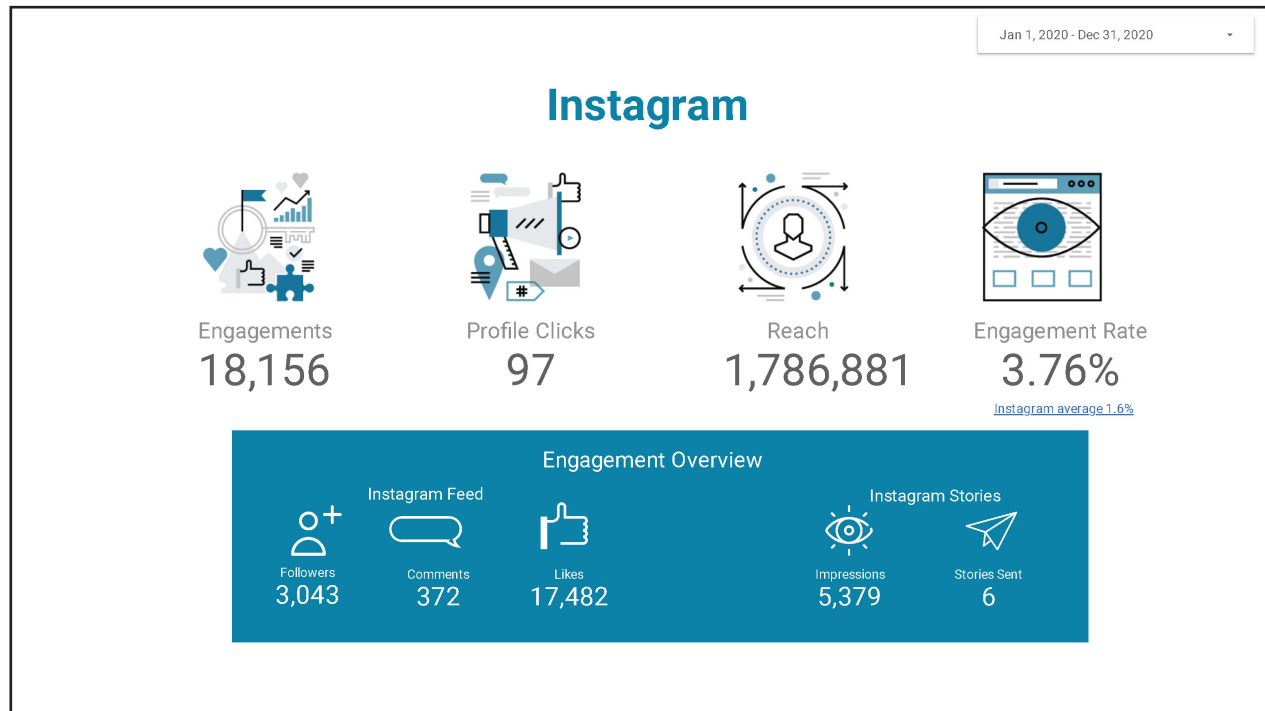
• Our spike in engagement in August can be attributed to our higher spend on paid ads.

Published At	Image	Message	Engagement Total
Aug 5, 2020, 9 PM		Anybody else live for these #BlufftonSC sunrises? Yeah, us too. 🍷🌴🌊 athenakuang	7,535
Feb 26, 2020, 3 PM		Beautiful blooms by the Church Of The Cross 🌸🌸🌸 michelle_woods	3,559
Apr 3, 2020, 3 PM		Sliding into the end of the week like... 🍷 We hope your weekend is as cozy as this little doodle! 🐶 twospoiledoods	3,366
Jul 9, 2020, 9 PM		Bluffton—where even the trees look comfy cozy. 🍷🌴🌊	2,821

1 - 100 / 194 < >





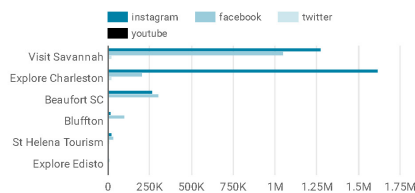


## Competitor Landscape

Jan 1, 2020 - Dec 31, 2020

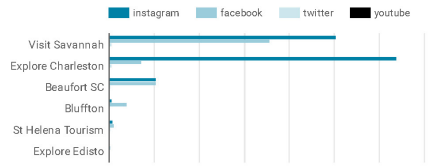
### Cross Channel Engagement Total

What were the total amplification, applause, and conversation across social channels?



### Amplification

What were the total shares across social channels?



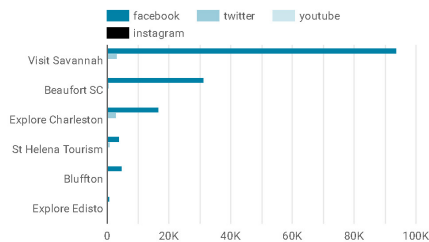
### Cross Channel Audience Growth

Visit Savannah	450,016	Explore Charleston	387,440
↑ 2.4%		↑ 4.5%	
*St. Helena	0	*Explore Edisto	9,040
0		↑ 1.4%	
Bluffton	3,485	*Beaufort, SC	153,578
↑ 266.1%		↑ 0.7%	

\*September-December (no data available prior to Sept.)  
\*Beaufort has no data prior to November.

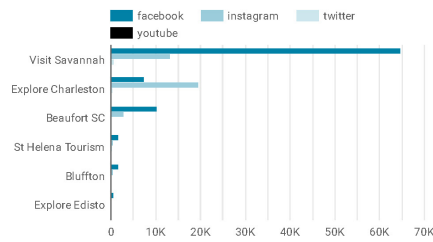
### Applause

What were the total reactions across social channels?



### Conversation

What were the total comments across social channels?



### Insights

• Bluffton saw far more audience growth in 2020 than our competitors (9.83% average growth).

• As our first full year as Bluffton, SC on social media, 2020 was focused on audience growth. We saw the biggest gains on Facebook while our competitors saw the most growth on Instagram.

## Heading into 2021

2020 was a successful year for Bluffton SC's social accounts, with the brand consistently showing the most cross-channel growth in our competitor landscape. In 2021, there are opportunities to grow our Gen X and Millennial audience while still catering to our Baby Boomer audience, particularly by using our individual platforms more strategically to reach top demographics. With the launch of our new website, we will focus on CTAs that lead to our website (while still promoting partner links).

### Opportunities:

- With the new website launching, we should create content like blogs and itineraries to bring people to the website from social.

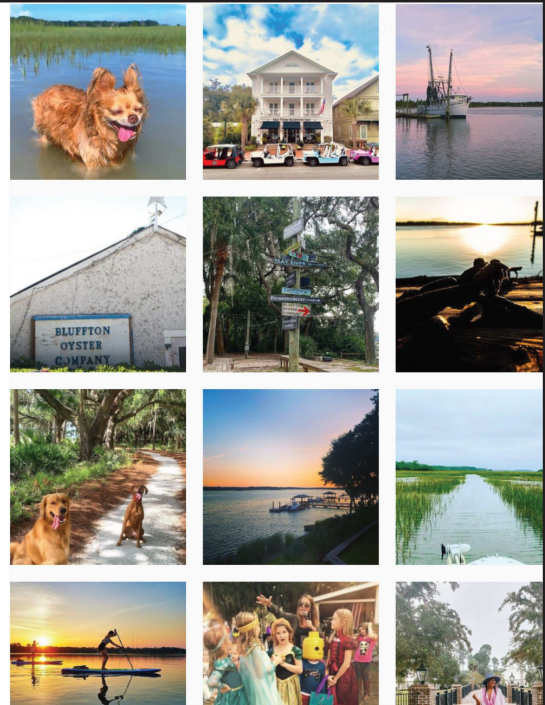
- Twitter remains a slow-growing channel, so we should shift efforts away from it to develop a Pinterest strategy for the website launch. This will require content on our website like blogs and itineraries to lead users to. Twitter can remain active for press hits, award acknowledgement, Bluffton business news, and the occasional May River / sunset and sunrise shots.

### Our 2021 Strategic Objectives & KPI's\*:

820 Facebook Likes / Month = 17,055 Followers by end of Q2 (June)

200 Instagram Followers / Month = 4,243 Followers by end of Q2 (June)

\*KPIs are based on planned media spend for the rest of the fiscal year, and are subject to change/review if any changes are made to the budgets.

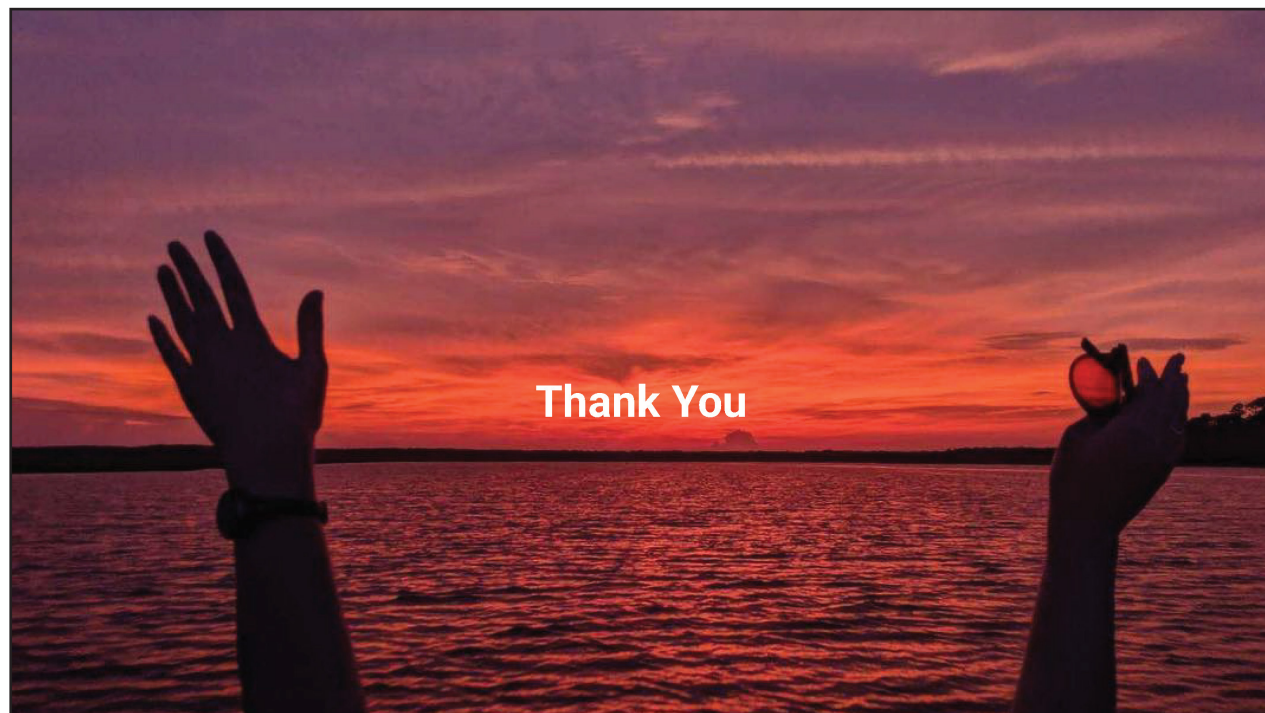


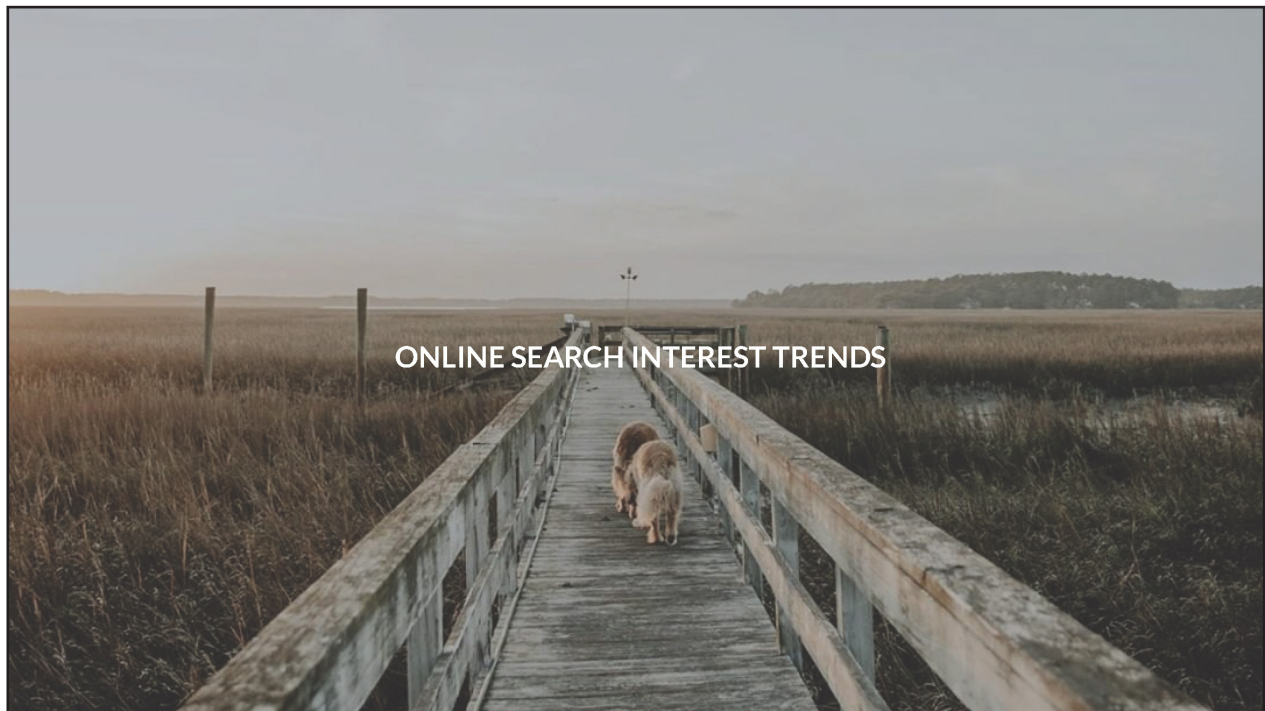


Jan 1, 2020 - Dec 31, 2020

## Glossary

Term	Definition	Number
Backlinks	Links from other domains pointing back to our own, ultimately improving SEO.	1
Booking Funnel	Illustrates the customer journey towards the purchase of a good or service.	2
Bounce	When a user leaves your website from the landing page without visiting any other pages.	3
Bounce Rate	The percentage of sessions on your website with only one page view.	4
Conversion	A measured and tracked pre-determined goal, for example obtaining email newsletter subscribers.	5
Conversion Rate%	The percentage of users who take a desired action, aligned with the conversion goal.	6
CPC	Cost per click. The cost of the media spend divided by the number of clicks.	7
CTR	Click-through rate. The percentage of impressions that resulted in a click.	8
Direct Traffic	Users that comes to your website via typing the URL directly in a browser.	9
Display Ads	Graphic advertising on website media through banners or other advertising formats made of text,...	10
Domain Authority / Ran...	An estimate of how well any given domain will perform in search.	11
Ecommerce Conversion ...	The ratio of transactions to sessions, expressed as a percentage.	12
Engagement Rate	Measures the level of engagement that content is receiving from an audience. It shows how much...	13
Exit %	Percentage of users who viewed the page and exited the site.	14
Exit Page	The page where a user exits your website.	15
Impressions	The number of times an ad, search result or a social post is viewed.	16
Key Performance Indica...	Used to evaluate the success of a brand or campaign in meeting the objectives for performance.	17
Lead Time	The amount of time it takes for a product to be delivered to the customer.	18



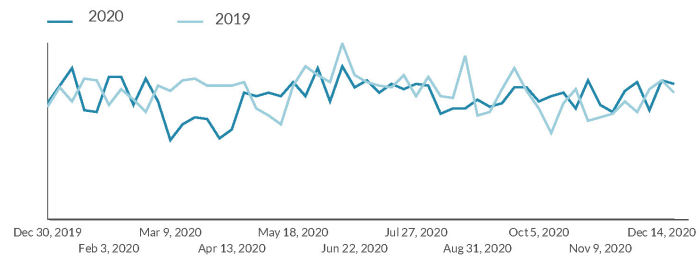
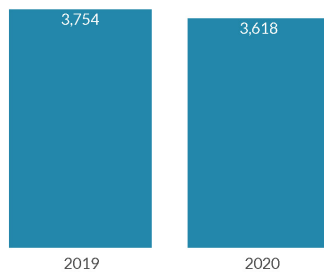




## BLUFFTON

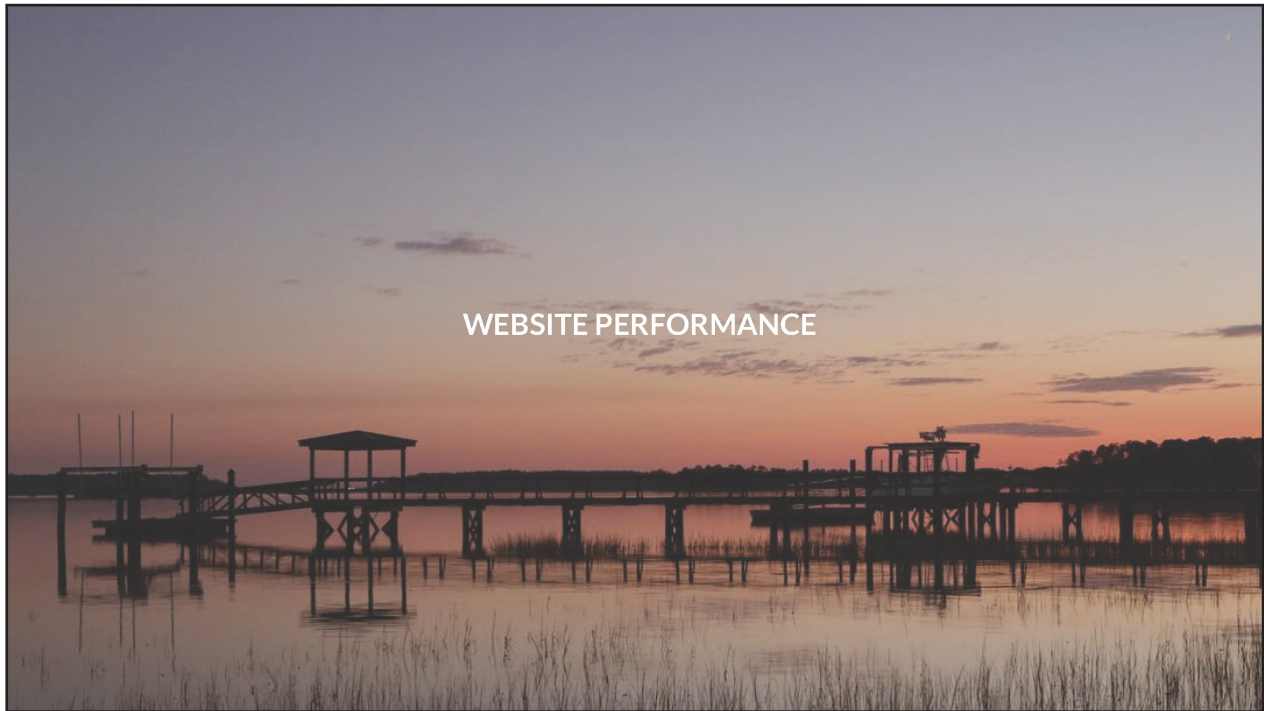
### SEARCH INTEREST

- In 2020, Search interest decreased 3% vs PY. Outside of South Carolina, the top Brand interest markets were North Carolina, Georgia, Connecticut, and Delaware, which replaced Tennessee as the fourth-highest search interest market in 2020 outside South Carolina.
- Top terms used to search for Hilton Head Island Bluffton were bluffton sc, bluffton south carolina, things to do in bluffton sc, bluffton events, bluffton arts and seafood festival, bluffton south carolina upcoming events, bluffton, bluffton sc events, bluffton restaurants, bluffton library, hotels in bluffton and things to do bluffton sc.



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HEART OF THE LOWCOUNTRY

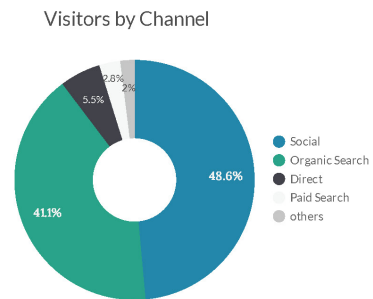
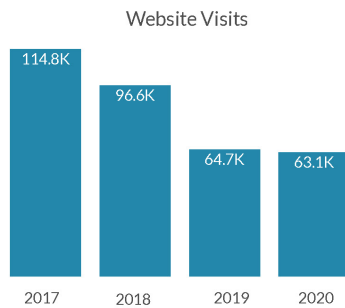
### WEBSITE PERFORMANCE



## BLUFFTON

### TOTAL WEBSITE VISITATION

- There have been 63K visits to the Bluffton sections of the website, predominantly by search traffic (social and organic). Traffic is down 4% vs PY, driven by all traffic sources, but the biggest decline came as a result of a decrease in paid search and display traffic.
- Mobile traffic increased 173% vs. PY and desktop traffic increased 32% vs. PY.
- Social and organic search drove the majority of traffic to the site, accounting for over 89% of traffic.

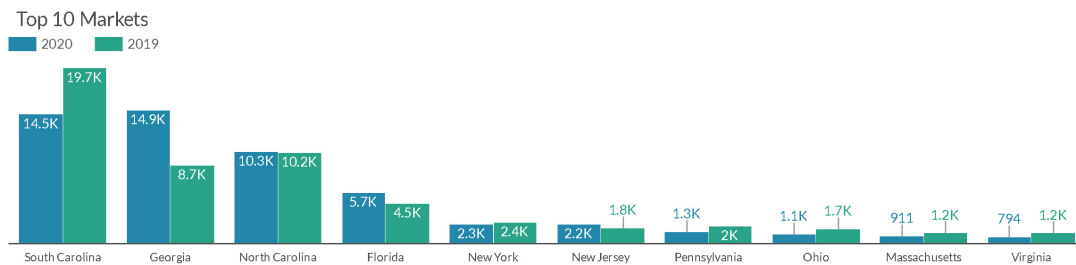


**bluffton**  
HEART OF THE LOWCOUNTRY™

## BLUFFTON

### DMAs

- In 2020, the top 10 DMA traffic declined by 3% compared to the PY. The top 10 DMAs drive 86% of all traffic to the website. South Carolina continued as a top DMA in 2020, but Georgia outperformed North Carolina in traffic, making Georgia the second most popular destination.



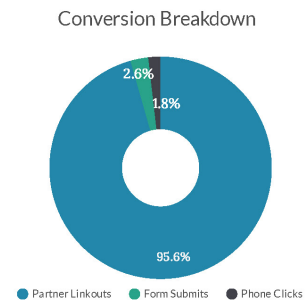
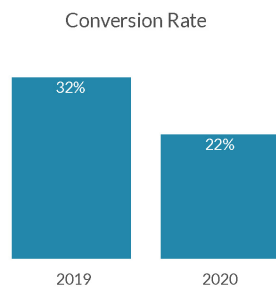
**bluffton**  
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## BLUFFTON

### CONVERSION RATE OVERVIEW

- In 2020, the HHI Bluffton conversion rate was down 31% compared to the PY. This was due largely to decreased paid search and display spend.
- The majority of conversions were Outgoing Partner Links (95%).
- There were also 533 phone clicks and 374 forms submitted.



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HEART OF THE LOWCOUNTRY





# bluffton

HEART OF THE LOWCOUNTRY

HILTON HEAD ISLAND-BLUFFTON VISITOR & CONVENTION BUREAU

[VisitBluffton.org](http://VisitBluffton.org)





# **Bluffton Juneteenth Festival and Jazz Brunch**

*Presented by the Bluffton MLK Observance Committee*

**Application Date: March 31, 2021**

**Event Dates: June 19 & 20, 2021**

**Sponsor:**

Bluffton MLK Observance Committee  
PO Box 3737  
Bluffton, SC 37066

Jackie Brown, Secretary  
843-227-0485

**Contact Information:**

Katherine Louw, Director of Good, Watterson Brands & Juneteenth Event Volunteer  
615-804-0758  
[katherine.louw@wattersonbrands.com](mailto:katherine.louw@wattersonbrands.com)

March 31, 2021

Town of Bluffton  
20 Bridge Street  
Bluffton, SC 29910

Dear members of Accommodations Tax Advisory Committee,

The Bluffton MLK Observance Committee, 501(c)(3), respectfully requests funding for the Bluffton *Juneteenth Freedom Festival* and the *Juneteenth Jazz Brunch*, scheduled for Saturday, June 19<sup>th</sup> and Sunday, June 20<sup>th</sup>, respectively.

The Bluffton MLK Observance Committee has hosted an annual Juneteenth Freedom Festival since 2015 and this year, we are excited to extend the festivities with the addition of a Juneteenth Jazz Brunch on Sunday morning. The beautiful, new Burnt Church Distillery will host both events. We believe the combined synergy of past, successful Juneteenth events, the lifting of restrictions around COVID, and hosting the events at our community's most celebrated, new venue, all position this event to achieve a new level of success in 2021.

The Bluffton MLK Observation Committee was established in 1984 as group for community-minded individuals to support events and efforts centered around the legacy of Martin Luther King, Jr. In 2020, after 37 years without legal status, we filed and were officially granted non-profit status, receiving our letter of determination earlier this month. The Juneteenth Jazz Brunch is being added this year to begin raising funds and spreading the word about the work of the Bluffton MLK Observance Committee, most notably BlacQuity, our new initiative designed to train and promote black entrepreneurs in the community.

According to MMGY Global, Black Americans spent \$109.4M on leisure travel in 2019, with a significant portion of that being focused on cultural travel. Our goal is to raise the profile of The Bluffton MLK Observance Committee's *Juneteenth Freedom Festival* and *Juneteenth Jazz Brunch*, not only attracting locals and friends from neighboring communities into Bluffton to celebrate our heritage, but also attracting out-of-town tourists to increase hotel occupancy in the City of Bluffton. The logos of Bluffton Inn, Comfort Inn & Suites, and Montage Palmetto Bluff will be included in event promotional pieces as suggested accommodations.

Our sincere thanks for your consideration. We hope to welcome you to Burnt Church Distillery on June 19<sup>th</sup> and 20<sup>th</sup>.

Warm regards,

Jacquelyn Brown  
Bluffton MLK Observance Committee, Secretary  
Home Sweet Home In-Home Care Services, Owner



Billy Watterson  
Bluffton MLK Observance Committee, Board Member  
Watterson Brands, Founder & President  
Burnt Church Distillery, Owner





Police/Security	\$3,900
Sanitation/Utilities (40% of total cost)	\$1,000
Trolley Service (40% of total cost)	\$1,400
Event Production (stage, tents, etc)	\$5,000
Marketing Design	\$5,000
Print and Web Media Ads	\$11,200
<b>Total</b>	<b>\$27,500</b>

Total Event Budget: \$55,500

### **The 7<sup>th</sup> Annual Bluffton Juneteenth Celebration**

Hosted by the Bluffton MLK Observance Committee, this year's Juneteenth Celebration aims to grow this event. Presented in partnership with the Burnt Church Distillery and Lowcountry Legacy Fund of the Community Foundation of the Lowcountry, our goal is to build upon the past success of Juneteenth events, attracting a wider audience to celebrate the rich cultural heritage and talent that exists in this region.

The Saturday event will be family-friendly and free of charge to the public, and the event will attract locals and tourists alike. Alcoholic beverages will be available for purchase through Burnt Church Distillery and Pizza Co. Guests will be invited to purchase food at Pizza Co, as well as food vendors. Other sources of event revenue will include sponsorships, booth rentals, reserved event seating, and retail sales.

Highlights of this year's event:

- Title Sponsor VIP tent for Saturday festivities
- Reserved Seating
- Live music and entertainment at Square 67
- Shopping and food at select Gullah vendor booths on Palmer's Stretch
- Event print advertising, and online ticket purchasing available prior to event, to include accommodations information to promote out-of-town attendance

The Sunday event will be an adults-only ticketed event serving a Gullah brunch prepared by local chef, BJ Dennis, complete with mimosas, bloody mary's, and sweet, iced tea. Guests will enjoy music by 5-piece jazz ensemble, The ZD Experience, from Charleston.

**2021 Bluffton Juneteenth Program Outline**  
*Tentative*

Event Programing 3:00-9:00PM

Invocation . . . . . Pastor Paul Hamilton

Juneteenth Town of Bluffton Proclamation . . . . . Mayor Lisa Sulka or Appointee

Roll Call of African American Veterans . . . . .

Negro National Anthem “***Lift Every Voice & Sing***”

Reading of the Emancipation Proclamation . . . . . Louise Cohen  
*(Founder of the Hilton Head Island Gullah Museum)*

Musical Entertainment . . . . . 4:30-9:00PM

*The Voices of El Shaddai*

*Stee and Ear Candy*

*Lalie Mole and Jason*

*Dance Group*

*Deez Guys*

Who We Be’ . . . . . Dr. Amir Toure  
*(History Professor at Savannah State University)*





## *The Bluffton MLK Observance Committee*

Attachment 5

Bridgette Frazier, *President*  
Aaron Jenkins, *Vice-President*  
Benisha Brown, *Treasurer*  
Jacqueline Brown, *Secretary*  
P.O Box 3737, Bluffton, SC  
blufftonmlk@yahoo.com

Tuesday December 1, 2020,

Members present at meeting: Bridgette Frazier, Benisha Brown, Aaron Jenkins, Leah Frazier, Jacqueline Brown

Meeting began at 5:45PM

Bridgette called the meeting to order at 5:45PM

Jacqueline Brown read the minutes from the previous meeting.

Aaron Jenkins made a motion to accept the minutes as read; Leah Frazier second, all present unanimously voted to accept the minutes and minutes were adopted.

Benisha Brown gave a financial report of the current balance in the account, \$1,980.00  
Benisha reported that all vendors from the previous event had been paid out and our next priority is establishing an account for the 501©3 as The Bluffton MLK Observance Committee and the creation of a subsidiary account which shall be names BlacQuity.  
Benisha stated that she will follow-up with Palmetto State Bank and South State Bank to get our account established. Benisha will report out at the next on the success of opening the account.

Bridgette opened the floor for Old Business.

Aaron mentioned that new trash cans needed to be purchased because the folding ones were not withstanding the wind. He will do a price check at Walmart and get with Benisha to be reimbursed for purchase.

Benisha confirmed that DJ T-Gramz would be the entertainment for the event.

Jacqueline stated that applications were still coming in, but we currently have 37 vendors and expecting to cap entrants to 40.

The floor for Old Business was closed and Bridgette opened the floor for New Business

Bridgette stated that the Black Excellence Ball planning need to commence. The original plan was to host the event outside but concerns to move it inside prompted Bridgette to look at potential venues. She called Northridge Venue during the meeting and received confirmation that the date of 1/16/21 is open and the cost to reserve would be \$500. The group decided that, that was a good price and wanted to go preview the venue to confirm. In addition to confirming the venue, securing a band and caterer was also discussed. The group La Faye & The Fellas was mentioned and Bre would reach out for pricing info, Leah agreed to do the



## Attachment 5

Bridgette Frazier, *President*  
Aaron Jenkins, *Vice-President*  
Benisha Brown, *Treasurer*  
Jacqueline Brown, *Secretary*  
P.O Box 3737, Bluffton, SC  
blufftonmlk@yahoo.com

desserts for the event and everyone was tasked with reaching out to potential caterers and chefs for pricing.

A meeting was had with Burnt Church Distillery and their planning committee has decided to collaborate with The Bluffton MLK Observance Committee to host The 7<sup>th</sup> Annual Bluffton Juneteenth Festival 2021. There will be a (2) day celebration hosted at the distillery. The Gullah market will be moved and combined with the celebration at the distillery. The weekend will end on Sunday with a ticketed event; a Jazz Brunch at the distillery. Bridgette and Jackie will meet with the planning committee and follow up with event details.

No additional new business was brought up and a motion to adjourn was made by Leah Frazier and second by Jacqueline Brown. Unanimous consensus for adjournment.

The meeting adjourned at 6:55PM.



<b>Income</b>		
	<b>Account</b>	<b>2021 Budget</b>
	Burnt Church Distillery	\$13,000
	Cash Sponsorships*	\$10,000
	Town of Bluffton*	\$5,000
	ATAX Funds*	\$27,500
	<b>Total Receivables</b>	<b>\$55,500</b>
	<i>*Requested</i>	
<b>Expenses</b>		
<b>Logistics</b>		
	Venue	\$10,000
	Rentals (Stage, Production, Tents, etc.)	\$5,000
	Sanitation	\$2,500
	Police/Security	\$5,000
	Shuttles/Trolleys	\$3,500
	Entertainment	\$5,000
	Misc fees (Insurance, permits, printing)	\$4,000
<b>Marketing</b>		
	Design & Promo (website, banners, signs, posters, flyers)	\$5,000
	Event Photography	\$500
	Print and Web Media Ads	\$15,000
<b>Total Expenses</b>		<b>\$55,500</b>





Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
P.O. Box 2508  
Cincinnati, OH 45201

BLUFFTON MLK OBSERVANCE COMMITTEE  
C/O BRIDGETTE FRAZIER  
PO BOX 3737  
BLUFFTON, SC 29910-0000

Date: 03/02/2021  
Employer ID number: 85-4095993  
Person to contact:  
Name: Customer Service  
ID number: 31954  
Telephone: (877) 829-5500  
Accounting period ending: December 31  
Public charity status: 170(b)(1)(A)(vi)  
Form 990 / 990-EZ / 990-N required: Yes  
Effective date of exemption: November 4, 2020  
Contribution deductibility: Yes  
Addendum applies: No  
DLN: 26053738003050

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

*Stephen A. Martin*

Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements



Bluffton, SC

# Juneteenth Celebration

June 19-20, 2021

Celebrating freedom and our rich, cultural heritage, while spotlighting the amazing talent of our local, black community.



*A weekend-long, cultural celebration of freedom.*

# Program of Events

## Community-Wide Cultural Celebration

**Saturday, June 19, 3pm-10pm**

Join us for the afternoon at the newly, opened Burnt Church Distillery for a community-wide celebration of freedom.

Live, cultural music and entertainment will provide a festive and enriching backdrop while guests socialize, shop goods made by local artisans, and indulge in food trucks featuring Gullah cuisine. The program will commence at 3pm with a reading of the Juneteenth Town of Bluffton Proclamation by Bluffton Mayor, Lisa Sulka.

## Post-Church, Jazz Brunch

**Sunday, June 20, 12pm-3pm**

Also at Burnt Church Distillery, this private, ticketed event will allow guests to enjoy brunch prepared by Gullah Chef BJ Dennis while enjoying the smooth sounds from jazz ensemble, The ZD Experience. Visit [www.blufftonmlk.com](http://www.blufftonmlk.com) for tickets.



Attachment 5







**JUNETEENTH**  
CELEBRATE FREEDOM

## THE BLUFFTON GULLAH MARKET

Are you ready to witness greatness in action?

**SATURDAY JUNE 20, 2020**  
**11AM-5PM**  
**BLUFFTON EAGLES FIELD**



# Marketing + Promotion

## Digital: Website, Email, Social Media

Promotions through @BlufftonMLK and @BurntChurchDistillery social accounts.

## Print: Regional Advertising

Print ads in Local Life, Bluffton Today, South Magazine, and more.

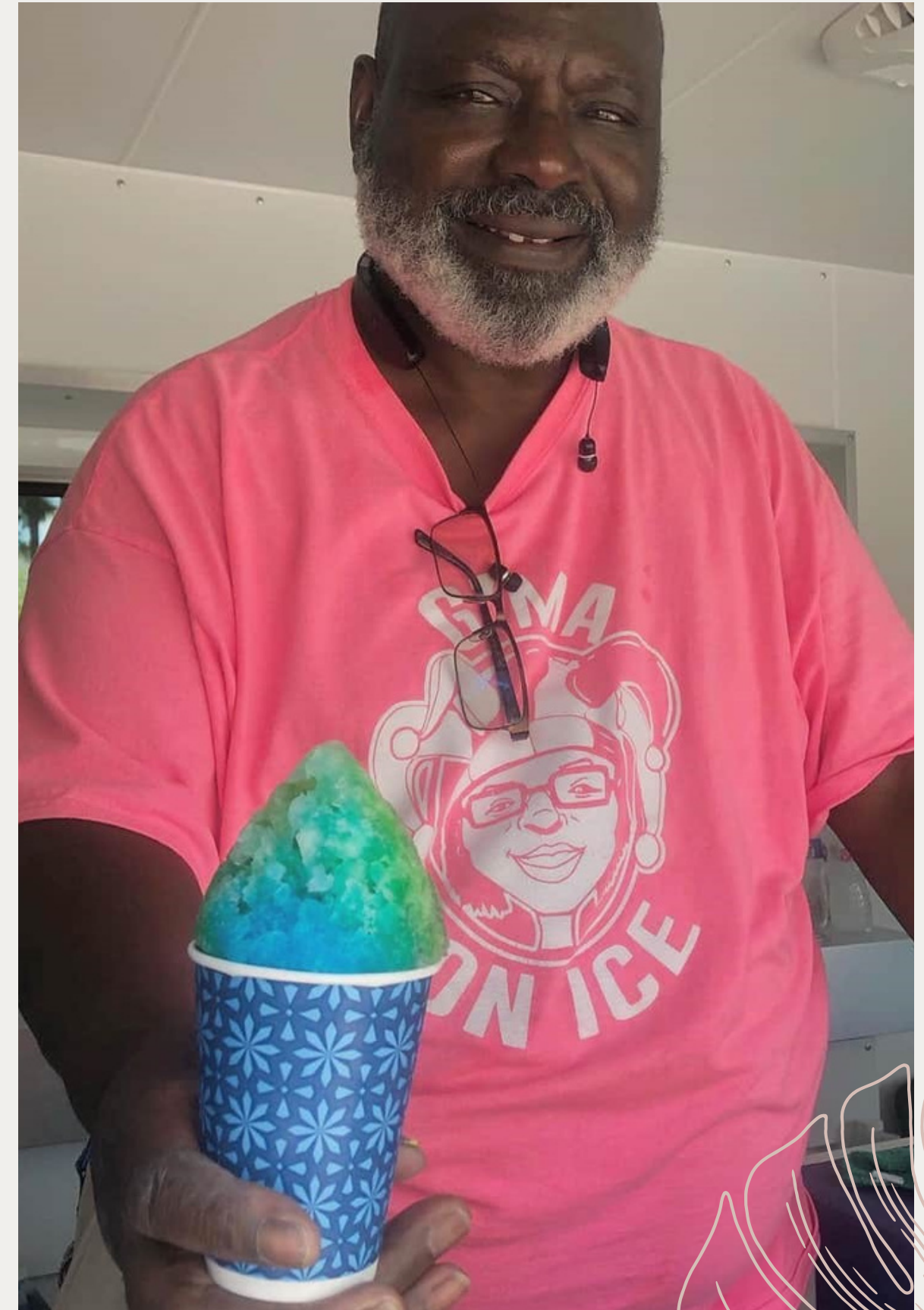
*2021 Artwork is currently in production, and pending funding, will include Town of Bluffton and hotel logos.*



*A weekend-long, cultural celebration of freedom.*

## Notable Facts:

- In 2019 the Bluffton MLK Juneteenth event drew approximately 1,000 visitors to the Heyward House. At Eagle Field in 2020, we hosted more than 2,000 visitors from Charlotte, Charleston, Savannah, and other surrounding areas.
- While Juneteenth has been celebrated in black communities almost since 1865, and in our community for the past 6 years, there is no question that the events of 2020 brought this holiday more recognition and celebration than in any year before. We are preparing for a larger crowd in 2021.





Quarterly Deadlines for application submittals:  
June 30, September 30, December 31, and March 31

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

**ACCOMMODATIONS TAX**  
**FUNDS REQUEST APPLICATION**

**For Office Use Only**

Date Received:  Time Received:  By:

---

Date:  March 31, 2021 Total Project Costs:  55,500 Total Amount Requested:  27,500

**SUBMIT 15 COMPLETE COPIES OF APPLICATION**

**ANSWERS MUST BE TYPEWRITTEN**

A. PROJECT NAME:  Bluffton Juneteenth Celebration

B. ORGANIZATION:  Bluffton MLK Observance Committee

**MUST BE A NOT-FOR-PROFIT ENTITY**

Sponsor Name:  Jacqueline Brown Title:  Secretary, Bluffton MLK

Sponsor Address:  PO Box 3737

Sponsor Phone:  Bluffton, SC 29910

Contact Name:  Katherine Louw Title:  Director of Good, Watterson Brands -

Contact Address:  1227 May River Road Bluffton, SC 29910

Contact Phone:  615-804-0758

## 1. General Description:

The Juneteenth events, scheduled for June 19 & 20, 2021 at the beautiful, new Burnt Church Distillery will celebrate Bluffton's rich, cultural heritage while spotlighting some of the amazing, local talent from our black community. The family-friendly Saturday festival will be educational and entertaining, providing ample opportunities for guests to shop and sample a variety of local flavors while enjoying musical, dance, and spoken word entertainment. Sunday's Jazz Brunch will offer smooth jazz entertainment with a special

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

The purpose of this event is to showcase our community's heritage and, to celebrate it, and to share it with all who come. Please see the attached tentative program outline, which lists confirmed artists and entertainers.

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

In 2019 our Juneteenth celebration drew a crowd of around 1,000 visitors to the Heyward House, and in 2020 those numbers doubled for the event at Eagle Field. We know that last year's event included attendees from Savannah, Charleston, Charlotte, and other regional locations. With our expanded plans for advertising, and the addition of a Sunday event, we plan to promote Bluffton's Juneteenth Celebration as a weekend event and will include accommodations information on

4. Duration of project: Starting Date: June 19, 2021 Completion Date: June 20, 2021

## 5. Permits required (if any):

## 6. Additional Comments:

The Bluffton MLK Observance Committee officially received status as a 501(c)3 organization in early March 2021 so there are no financials to share. Previous year's events have been done on a shoestring budget, with many vendors and artists donating their time and talents. This year, with the partnership of Burnt Church Distillery, and the momentum of becoming a

## D. FUNDING:

1. Source of funds: Burnt Church Distillery, Other corporate sponsors (pending), Lowcountry Leg

2. Have you requested funding from other sources or organizations for this project? Yes

If yes, please list sources and amounts.

Burnt Church Distillery (includes some in-kind value)

Amount: 13,000

Other corporate/foundation sponsors (pending)

Amount: 10,000

Town of Bluffton (pending)

Amount: 5,000

## 3. Contributions to the project by the sponsoring organization:

Bluffton MLK Observance Committee

Amount: 2,500



## E. FINANCIAL INFORMATION (ADHERE TO STRICTLY):

1. A line-item budget of the project.
2. Most recent fiscal year balance sheet and profit and loss accounting statement.

## F. FINANCIAL GUARANTEES:

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 contemplated in the application, should funding be approved.

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

1. How did you use the funds?

NA
----

2. What impact did this have on the community or benefit tourism?  
Describe how tourism statistics were captured.

--

3. Provide the previous two years and current budgets.
4. Include the **total annual funding** received each year that you applied.

## H. ADDITIONAL COMMENTS: (Attach additional sheets, if needed):

--

Signature: 

Jacqueline Brown
------------------

## APPLICATION FINAL CHECKLIST

(Complete and return this list with the application)

- ☒ The application is being filed by the deadline as indicated in this application packet.
- ☒ We have reviewed and followed the application guidelines.
- ☒ We are submitting 15 complete copies of the application.
- ☒ We will be prepared to make a verbal presentation to the Committee and answer questions when we are scheduled to do so.
- ☒ **We did not bind the application (NO BOOKS or BINDERS).**



# Accommodations Tax Funding Final Report

Attachment 5

You may record information directly on this form or create a separate document for more detailed responses.

## 1. PROJECT INFORMATION:

Organization Name:	<input type="text"/>
Project Name:	<input type="text"/>
Contact Name:	<input type="text"/>

## 2. PROJECT COMPLETION:

Were you able to complete the project as stated in your original application?	<input type="text"/>
If no, state discrepancies.	<input type="text"/>

## 3. PROJECT SUCCESS:

Please share any additional comments regarding the project (e.g., lessons learned, successes, problems encountered, etc.)

## 4. PROJECT ATTENDANCE:

Record numbers in table below. Numbers are to reflect attendance and funds received for projects for both the current and previous periods.

	Prior Period	Current Period
Total budget of event / project	<input type="text"/>	<input type="text"/>
Amount funded by Town of Bluffton Accommodations Tax	<input type="text"/>	<input type="text"/>
Amount funded by other sources	<input type="text"/>	<input type="text"/>
Total attendance	<input type="text"/>	<input type="text"/>
Total tourists	<input type="text"/>	<input type="text"/>

## 5. Methods:

Please describe the methods used to capture the attendance data listed above (e.g., license plates, surveys, zip codes, etc.)

## 6. Project Budget:

Please attach report indicating project expenses compared to budget for the current grant.

## 7. Organization Signature:

Provide signature of official within organization, verifying accuracy of above statements.

Name:	<input type="text"/>	Title:	<input type="text"/>
Signature:	<input type="text"/>	Date:	<input type="text"/>

**Bluffton Juneteenth Celebration:**

C.1.: The Juneteenth events, scheduled for June 19 & 20, 2021 at the beautiful, new Burnt Church Distillery will celebrate Bluffton's rich, cultural heritage while spotlighting some of the amazing, local talent from our black community.

The family-friendly Saturday festival will be educational and entertaining, providing ample opportunities for guests to shop and sample a variety of local flavors while enjoying musical, dance, and spoken word entertainment.

Sunday's Jazz Brunch will offer smooth jazz entertainment with a special Lowcountry culinary experience.

C.3.: In 2019 our Juneteenth celebration drew a crowd of around 1,000 visitors to the Heyward House, and in 2020 those numbers doubled for the event at Eagle Field. We know that last year's event included attendees from Savannah, Charleston, Charlotte, and other regional locations.

With our expanded plans for advertising, and the addition of a Sunday event, we plan to promote Bluffton's Juneteenth Celebration as a weekend event and will include accommodations information on all advertising.

C.6.: The Bluffton MLK Observance Committee officially received status as a 501(c)3 organization in early March 2021 so there are no financials to share. Previous year's events have been done on a shoestring budget, with many vendors and artists donating their time and talents. This year, with the partnership of Burnt Church Distillery, and the momentum of becoming a more formalized organization, we are excited to be able inject more capital and human resources behind this event. Juneteenth, as a holiday, has gained tremendous momentum in the last year, and we believe there is tremendous opportunity to build Bluffton's Juneteenth celebrations into something very special that will attract more tourists from greater distances with each year.

D.1.: Burnt Church Distillery, Other corporate sponsors (pending), Lowcountry Legacy Fund, City of Bluffton



# ACCOMMODATIONS TAX ADVISORY COMMITTEE

## STAFF REPORT

### Department of Finance & Administration



MEETING DATE: May 18, 2021  
 SUBJECT: Bluffton MLK Observance Committee: Bluffton Juneteenth Celebration  
 PROJECT MANAGER: Natalie Majorkiewicz, CGFO, Treasury Manager

Summarized below is the application from the Bluffton MLK Observance Committee for Accommodations Tax grant dollars in support of advertising and promotion of tourism, facility expenses for cultural event, municipality services, and tourist transportation.

**Requested Amount: \$27,500.**

Bluffton Juneteenth Celebration	Total Budget	Recommended ATAX Grant (50% of project budget)
Advertising and Promotion:	\$ 20,500	\$ 16,200
Facilities for Cultural Events:	5,000	5,000
Municipality Services:	7,500	4,900
Tourist Transportation:	3,500	1,400
Project Expenses:	19,000	N/A
<b>Total</b>	<b>\$ 55,500</b>	<b>\$ 27,500</b>

Eligible "Tourism-Related Expenditures" per South Carolina Code of Laws include, *"advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity"* and *"promotion of the arts and cultural events"*

Advertising and Promotion:

- Total budget line is \$20,500
- Eligible budgeted expenses:
  - Design & Promo: \$5,000
  - Print and Web Media Ads: \$15,000

Facilities for Civic & Cultural Events:

- Total budget line is \$15,000
  - Eligible budgeted expenses: Rentals (Stage and tent) \$5,000

Municipality Services:

- Total budget line is \$7,500
- Eligible budgeted expenses:
  - Sanitation at % of tourist attendance \$1,000
  - Police/Security \$5,000

Tourist Transportation:

- Total budget line is \$3,500
- Eligible budgeted expenses are at % of tourist attendance \$1,400

Festival/Event: Event is scheduled for June 19 & 20, 2021

Bluffton Event: The event will be held at Burnt Church Distillery.

Tourism Draw %: Tourism statistics were not gathered at the 2020 event. Estimated attendance was around 2,000 people and included attendees from Savannah, Charleston, Charlotte, and other regional locations.

Benefit to Tourism: Adding Sunday and creating a weekend event will hopefully increase tourism attendance and accommodations information will be included on advertisements.

Self-Sufficiency % (Financial Need): Requesting \$27,500, which is approximately 50% of the total project budget of \$55,500.

**Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)**

Amount Recommended	Advertising (15)	Festival/ Event (5)	Bluffton Event (5)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency (5)	Total of 40 possible	Comments
\$27,500	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Electronic Meeting

Previous Funding Amounts to Organization - N/A

Accommodations Tax Committee Recommendations and Comments:

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The Committee recommends funding \$27,500 for promotion of arts and cultural events (\$16,200), facilities for cultural events (\$5,000), municipality services (\$4,900), and tourist transportation (\$1,400).



## RESOLUTION

**A RESOLUTION AUTHORIZING AMENDMENT 3 TO MEMORANDUM OF AGREEMENT 2017-69 BETWEEN THE TOWN OF BLUFFTON AND THE HISTORIC BLUFFTON FOUNDATION, FORMERLY KNOWN AS THE BLUFFTON HISTORICAL PRESERVATION SOCIETY WHEREIN THE HISTORIC BLUFFTON FOUNDATION WILL SERVE AS THE TOWN OF BLUFFTON'S OFFICIAL WELCOME CENTER, CONDUCT COMMUNITY OUTREACH AND EDUCATION, AND MAINTAIN THE CALDWELL ARCHIVES.**

**WHEREAS**, the Town of Bluffton has a rich history and cultural heritage which should be protected and preserved for future generations to experience; and

**WHEREAS**, the on February 9, 2001, Town Council adopted a resolution designating the Heyward House Historic Center as the official Welcome Center for the Town of Bluffton; and

**WHEREAS**, the Town of Bluffton and the Bluffton Historical Preservation Society (BHPS), now known as the Historic Bluffton Foundation (HBF) entered into a Memorandum of Agreement (MOA) on December 13, 2016; and

**WHEREAS**, the Town of Bluffton adopted a Resolution renewing MOA 2017-69 for an additional fiscal year term beginning on July 1, 2019 through Amendment 1 between the Town of Bluffton and BHPS on July 9, 2019; and

**WHEREAS**, the Town of Bluffton adopted a Resolution renewing MOA 2017-69 for an additional fiscal year term beginning on July 2, 2020 through Amendment 2 between the Town of Bluffton and BHPS on May 12, 2020; and

**WHEREAS**, S.C. Code § 6-4-10(4)(b)(8) provides, in part, that operating a welcome center is an eligible tourism-related expenditure; and

**WHEREAS**, SC Revenue Ruling #98-22 provides, in part, that expenditures will qualify to operate and maintain a welcome center whose primary purpose is to provide information, brochures, and other services to tourists; and

**WHEREAS**, the Town of Bluffton awards accommodation tax funds of One Hundred, Sixty-Nine Thousand Dollars (\$169,000) to support the Welcome Center at the Heyward House.

**NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:**

- Town Council hereby authorizes the Interim Town Manager to enter into Amendment 3 to Memorandum of Agreement 2017-69; and
- The term of Amendment 3 to Memorandum of Agreement 2017-69 shall be effective July 1, 2021 through June 30, 2022.

**THIS RESOLUTION SHALL TAKE FULL FORCE AND EFFECT ON JULY 1, 2020.**

**SIGNED, SEALED AND DELIVERED AS OF THIS 8<sup>th</sup> DAY OF JUNE 2021.**

\_\_\_\_\_  
Lisa Sulka, Mayor  
Town of Bluffton, South Carolina

ATTEST:

\_\_\_\_\_  
Kimberly Chapman, Town Clerk  
Town of Bluffton, South Carolina



<b>STATE OF SOUTH CAROLINA</b>	)	<b>AMENDMENT 3</b>
	)	<b>TO</b>
<b>COUNTY OF BEAUFORT</b>	)	<b>MOA 2017-69</b>

**WITNESSETH:**

**WHEREAS**, on December 13, 2016, the Town of Bluffton (“the Town”) entered into a Memorandum of Agreement with the Bluffton Historical Preservation Society (“BHPS”), now known as the Historic Bluffton Foundation (“HBF”); and

**WHEREAS**, that Agreement, documented as Agreement 2017-69, denoted that HBF would serve as the Town’s officially designated Welcome Center (as adopted by Town Council resolution dated February 14, 2001), conduct community outreach and education, and maintain the Caldwell Archives; and

**WHEREAS**, in accordance with the Memorandum of Agreement, the Town would coordinate the Historic Preservation Commission’s duties, publicize HBF events, and facilitate long-term maintenance of the Caldwell Archives; and

**WHEREAS**, HBF makes its annual presentation to the Accommodations Tax Advisory Committee (“ATAC”) and Town Council on its budget for the Welcome Center as a recipient of Accommodations Tax funding in accordance with the Welcome Center’s function of promoting tourism in the Town.

**WHEREAS**, the Town may use Accommodations Tax to provide additional services to promote tourism and enlarge its economic benefits through advertising, promotion and providing those facilities and services which enhance the ability of the Town to attract and provide for tourists; and

**WHEREAS**, Amendment 1, effective July 1, 2019 through June 30, 2020, required HBF to present its first draft annual budget for the July 1 through June 30 fiscal year to Town Council in January with feedback incorporated into the annual Accommodation Tax request due at the end of March, and a budget presentation at the ATAC meeting in May with final presentation to Town Council in June. Amendment 1 prescribed the requisite level of detail for the budget and reporting; and

**WHEREAS**, Amendment 2 renewed the Agreement from July 1, 2020 through June 30, 2021; and

**NOW THEREFORE**, in exchange for the mutual promises written herein and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, and intending to be legally bound, the Town and HBF agree as follows:

1. The term of Amendment 3 of Memorandum of Agreement 2017-69 shall be effective July 1, 2021 through June 30, 2022.
2. All other terms and conditions of Memorandum of Agreement 2017-69 shall remain in full force and effect and remain unchanged except as stated herein.

**IN WITNESS WHEREOF**, the parties hereto have caused the within Amendment 3 to Memorandum of Agreement 2017-69 to be executed on this \_\_\_\_\_ day of \_\_\_\_\_, 2021.

HISTORIC BLUFFTON FOUNDATION

TOWN OF BLUFFTON

By: \_\_\_\_\_ Date: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

Print name: \_\_\_\_\_

Print name: Chris Forster

Position: \_\_\_\_\_

Position: Interim Town Manager

Attachments: Town Council Resolution



1. The above recitals are incorporated herein.
2. The Bluffton Historical Preservation Society's roles and responsibilities:

- A. **Welcome Center.** As the steward of the Heyward House Historic Center and recipient of ATAX funding restricted solely for the operation of the Town of Bluffton Welcome Center with the purpose of promoting tourism by providing those facilities and services which enhance the ability of the Town to attract and provide for tourists in accordance with the criteria associated with ATAX funding, the Historical Society will:
- 1) Hold the following hours of operation for the Welcome Center: Monday through Friday 10:00AM – 5:00PM and Saturday 10:00AM – 4:00PM, except for holidays designated by the Board;
  - 2) Collaborate with the Town and Town Staff to utilize the facility during conferences and other Town sponsored events when tours of the facility are desired. Admission fees will not be charged to Staff or the attendees;
  - 3) Permit the Town to have use of the Welcome Center for special events with the approval of the Welcome Center's Executive Director. If such events are held, any expenses to promote and host the event will be paid for by the Town;
  - 4) Present an annual budget for the Welcome Center to the Accommodations Tax Advisory Committee for funding consideration. The budget shall be in the format provided by the Town to include specific line items. The recommendation of the ATAX Committee will be provided to Town Council for consideration and final approval;
  - 5) Regularly adopt a July 1 to June 30 fiscal year;
  - 6) Report the Center's income and expenditures to the Town ten days after the end of each fiscal quarter and provide an update on the number of visitors;
  - 7) Present an annual audit performed by an independent Certified Public Accountant. The audit is to be presented to the Town no later than six months following the end of the fiscal year; and
  - 8) Maintain appropriate levels, in the Town's sole opinion, of insurance for general liability, auto liability, professional liability, and workers compensation coverage. The Historical Society must provide the Town with a Certificate of Insurance for each that names the Town as an additional insured.
- B. **Community Outreach and Education.** As the liaison and advocate for historic preservation initiatives to the community, the Historical Society will:
- 1) Bring together people interested in the history of Bluffton and vicinity;
  - 2) Collect materials which illustrate the history of the area;
  - 3) Disseminate historical information;



- 4) Preserve historic buildings, sites, material culture and archival material;
  - 5) Hold meetings with lectures and papers;
  - 6) Develop and hold regularly occurring educational programs to include walking tours and interpretation programs of the Garvin House located in Oyster Factory Park;
  - 7) Provide regularly occurring educational and training programs on a variety of historic preservation topics that include, but are not limited to: the history of the Bluffton area – its culture, architecture, and heritage; historic preservation programs for youth; and programs for homeowners of historic houses; and,
  - 8) Provide Bluffton History Class as required per Town of Bluffton Ordinance #2011-07 for all operators/drivers of licensed tour companies operating in the Town of Bluffton.
  - 9) Identify and maintain funding and financial assistance opportunities that may benefit the Old Town Bluffton Historic District and fulfill the current roles and responsibilities of the Historical Society.
- C. **Caldwell Archives.** As the steward of the Caldwell Archives, the Historical Society when requested will with ample notice:
- 1) Provide a representative to review the Caldwell Archives for historical documentation and submit comment and recommendation on the historical significance of applications brought before the Historic Preservation Commission;
  - 2) Provide documentation and comment regarding the abatement of properties that have been placed on the Unsafe, Uninhabited Building/Structure List;
  - 3) Provide access to the historical archives to the Town of Bluffton and their contracted consultants for use during the conducting of cultural and architectural surveys to be performed in the future; and
  - 4) Make the Caldwell Archives available both digitally and in hard copy for public use at least one day per week during set hours and with a fee schedule for research/reproduction services posted on the organization's website.

3. The Town of Bluffton roles and responsibilities:

- A. Administrate the regulatory compliance necessary for the promotion, protection, and improvement of the public health, safety, comfort, good order, appearance, convenience, prosperity, morals, and general welfare of the residents of Bluffton including the monitoring and abatement of Unsafe, Uninhabited Buildings/Structures;
- B. Coordinate the Historic Preservation Commission and the processing and review of Certificates of Appropriateness for the alteration, erection, renovation, demolition,

relocation, or removal, in whole or in part, of any structure located within a HD designated zoning district;

- C. Perform all necessary reporting, survey, and documentation to maintain the Certified Local Government status of the Town jointly administered by the National Parks Service (NPS) and the State Historic Preservation Offices (SHPOs);
- D. Partner in the research, application, and administration of economic development incentives and other grant, funding, or volunteer opportunities;
- E. On the request of the Welcome Center's Executive Director, the Town may, when feasible, provide limited landscaping services to the Welcome Center;
- F. Publicize and promote events, exhibits, and services sponsored by the Historical Society or occurring at the Welcome Center through the Town's Public Information Office; and
- G. Facilitate and assist the Historical Society with the long-term, safekeeping and stewardship of the Caldwell Archives in a properly controlled environment in a centralized location on-site at Town Hall or at another public facility.

#### 4. Terms of the Agreement.

- A. The term of this Agreement shall be for a period of one year commencing on July 1, 2016 and ending June 30, 2017. This agreement will automatically renew on an annual basis for one year terms commencing on July 1 of each successive year, unless terminated in accordance with this Memorandum of Agreement;
- B. The Town Manager or his designee may terminate his Agreement within ninety day notice, in whole or in part, at any time for the convenience of the Town. If this Agreement is terminated for the convenience of the Town, the Town will pay the Society the remaining funds approved by Town Council for the then-current fiscal year, if any. The Historical Society may, with ninety days written notice, terminate the agreement;
- C. The parties hereto intend that no master/servant, employer/employee, or principal/agent relationship will be created by this Agreement. Nothing contained herein creates any relationship between the Town and the Historical Society other than that which is expressly stated herein. The Town is interested only in the results to be achieved under this Agreement. The conduct and control of the Society's agents and employees and methods utilized in fulfilling its obligations hereunder shall lay solely and exclusively with the Historical Society. The Historical Society's agents or employees shall not be considered employees of the Town for any purpose. No person employed by the



Historical Society shall have any benefits, status, or right of employment with the Town;  
and

- D. The Historical Society shall defend, indemnify, and hold harmless the Town, its officers, directors, agents, and employees from and against any and all actions, costs, claims, losses, expenses, and/or damages, including attorney's fees, whether incurred prior to the institution of litigation, during litigation, or an appeal arising out of or resulting from the conduct of any activity hereby authorized or the performance of any requirement imposed pursuant by this Agreement, however caused or occasioned, unless caused by the willful misconduct or gross negligence of the Town.

APPROVED:



Anthony W. Barrett  
Executive Director  
Bluffton Historical Preservation Society



Marc Orlando, ICMA-CM  
Town Manager  
Town of Bluffton

## RESOLUTION

**A RESOLUTION AUTHORIZING AMENDMENT 1 TO MEMORANDUM OF AGREEMENT 2017-69 BETWEEN THE TOWN OF BLUFFTON AND THE BLUFFTON HISTORICAL PRESERVATION SOCIETY WHEREIN THE BLUFFTON HISTORICAL PRESERVATION SOCIETY WILL SERVE AS THE TOWN OF BLUFFTON'S OFFICIAL WELCOME CENTER, CONDUCT COMMUNITY OUTREACH AND EDUCATION, AND MAINTAIN THE CALDWELL ARCHIVES.**

**WHEREAS**, the Town of Bluffton has a rich history and cultural heritage which should be protected and preserved for future generations to experience; and

**WHEREAS**, the on February 9, 2001, Town Council adopted a resolution designating the Heyward House Historic Center as the official Welcome Center for the Town of Bluffton; and

**WHEREAS**, the Town of Bluffton and the Bluffton Historical Preservation Society (BHPS) entered into a Memorandum of Agreement (MOA) on December 13, 2016; and

**WHEREAS**, S.C. Code § 6-4-10(4)(b)(8) provides, in part, that operating a welcome center is an eligible tourism-related expenditure; and

**WHEREAS**, SC Revenue Ruling #98-22 provides, in part, that expenditures will qualify to operate and maintain a welcome center whose primary purpose is to provide information, brochures, and other services to tourists; and


**WHEREAS**, the Town of Bluffton awards accommodation tax funds of One Hundred, Ninety Thousand Dollars (\$190,000) to support the Welcome Center at the Heyward House.

**NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:**

- Town Council hereby authorizes the Town Manager to enter into Amendment 1 to Memorandum of Agreement 2017-69; and
- The term of Amendment 1 to Memorandum of Agreement 2017-69 shall be effective July 1, 2019 through June 30, 2020.

**THIS RESOLUTION SHALL TAKE FULL FORCE AND EFFECT ON JULY 1, 2019.**

**SIGNED, SEALED AND DELIVERED AS OF THIS 9<sup>th</sup> DAY OF JULY 2019.**

  
\_\_\_\_\_  
Lisa Sulka, Mayor  
Town of Bluffton, South Carolina

ATTEST:

  
\_\_\_\_\_  
Kimberly Chapman, Town Clerk  
Town of Bluffton, South Carolina



## RESOLUTION

**A RESOLUTION AUTHORIZING AMENDMENT 2 TO MEMORANDUM OF AGREEMENT 2017-69 BETWEEN THE TOWN OF BLUFFTON AND THE BLUFFTON HISTORICAL PRESERVATION SOCIETY WHEREIN THE BLUFFTON HISTORICAL PRESERVATION SOCIETY WILL SERVE AS THE TOWN OF BLUFFTON'S OFFICIAL WELCOME CENTER, CONDUCT COMMUNITY OUTREACH AND EDUCATION, AND MAINTAIN THE CALDWELL ARCHIVES.**

**WHEREAS**, the Town of Bluffton has a rich history and cultural heritage which should be protected and preserved for future generations to experience; and

**WHEREAS**, the on February 9, 2001, Town Council adopted a resolution designating the Heyward House Historic Center as the official Welcome Center for the Town of Bluffton; and

**WHEREAS**, the Town of Bluffton and the Bluffton Historical Preservation Society (BHPS) entered into a Memorandum of Agreement (MOA) on December 13, 2016; and

**WHEREAS**, the Town of Bluffton adopted a Resolution renewing MOA 2017-69 for an additional fiscal year term beginning on July 1, 2019 through Amendment 1 between the Town of Bluffton and BHPS on July 9, 2019; and

**WHEREAS**, S.C. Code § 6-4-10(4)(b)(8) provides, in part, that operating a welcome center is an eligible tourism-related expenditure; and

**WHEREAS**, SC Revenue Ruling #98-22 provides, in part, that expenditures will qualify to operate and maintain a welcome center whose primary purpose is to provide information, brochures, and other services to tourists; and

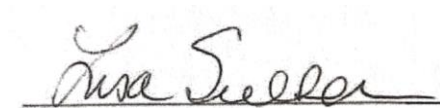
**WHEREAS**, the Town of Bluffton awards accommodation tax funds of One Hundred, Ninety Thousand Dollars (\$190,000) to support the Welcome Center at the Heyward House.

**NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:**

- Town Council hereby authorizes the Town Manager to enter into Amendment 2 to Memorandum of Agreement 2017-69; and
- The term of Amendment 2 to Memorandum of Agreement 2017-69 shall be effective July 1, 2020 through June 30, 2021.

**THIS RESOLUTION SHALL TAKE FULL FORCE AND EFFECT ON JULY 1, 2020.**

SIGNED, SEALED AND DELIVERED AS OF THIS 12<sup>th</sup> DAY OF MAY 2020.

A handwritten signature in black ink, appearing to read "Lisa Sulka", written over a horizontal line.

Lisa Sulka, Mayor  
Town of Bluffton, South Carolina

ATTEST:

A handwritten signature in blue ink, appearing to read "Kimberly Chapman", written over a horizontal line.

Kimberly Chapman, Town Clerk  
Town of Bluffton, South Carolina



## APPLICATION FINAL CHECKLIST

(Complete and return this list with the application)

- ☒ The application is being filed by the deadline as indicated in this application packet.
- ☒ We have reviewed and followed the application guidelines.
- N/A ☐ We are submitting 15 complete copies of the application.
- ☒ We will be prepared to make a verbal presentation to the Committee and answer questions when we are scheduled to do so.
- ☒ We did not bind the application (NO BOOKS or BINDERS).

TOWN OF BLUFFTON  
ACCOMMODATIONS TAX  
APPLICATION FOR FUNDS  
TITLE PAGE

1. PROJECT NAME: Welcome Center at the Heyward House

2. ORGANIZATION'S NAME: Historic Bluffton Foundation (HBF)

Sponsor/Primary contact: Kelly Logan Graham c/o Historic Bluffton Foundation P.O. Box 742  
Bluffton, SC 29910, 843-757-6293.

Secondary contact: Amanda Denmark c/o Historic Bluffton Foundation P.O. Box 742  
Bluffton, SC 29910, 843-816-6362

Amount requested: \$169,000

Date of application: March 26, 2021

Signature:  Kelly Graham, Executive Director of HBF



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Quarterly Deadlines for application submittals:

June 30, September 30, December 31, and March 31

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

**ACCOMMODATIONS TAX  
FUNDS REQUEST APPLICATION**

**For Office Use Only**

Date Received:

Time Received:

By:

---

Date: March 26, 2021

Welcome Center Total Project Costs: \$207,250

Amount Requested: \$169,000

**SUBMIT 15 COMPLETE COPIES OF APPLICATION**

**ANSWERS MUST BE TYPEWRITTEN**

- A. PROJECT NAME: Welcome Center at the Heyward House
- B. ORGANIZATION/SPONSOR: Historic Bluffton Foundation (HBF)

**MUST BE A NOT-FOR-PROFIT ENTITY**

Sponsor Name: Kelly Logan Graham Title: Executive Director of HBF

Sponsor Address: P.O. Box 742 Bluffton, SC 29910

Sponsor Phone: 843-757-6293



Primary Contact Name: Kelly Logan Graham Title: Executive Director of HBF  
 Primary Contact Address: P.O. Box 742 Bluffton, SC 29910  
 Primary Contact Phone: 843-757-6293  
 Secondary Contact Name: Amanda Denmark Title: President of HBF  
 Secondary Contact Address: P.O. Box 742 Bluffton, SC 29910  
 Secondary Contact Phone: 843-816-6362

### C. DESCRIPTION OF PROJECT:

**1. General Description:** Founded in 1981, the mission of the Historic Bluffton Foundation is to *protect, preserve, and promote the history and cultural heritage of the Town of Bluffton, South Carolina 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). Our vision is to be recognized as the pre-eminent authority, resource and proponent for historical preservation in Bluffton. Additionally, the Heyward House serves as the Welcome Center for the Town of Bluffton ensuring both an instructive and memorable visit to the town.

**Since 2000, the museum has provided tourists and local citizens with information about our regional history, culture and sites while promoting local businesses, restaurants, and special events.** If phone calls are received from those contemplating moving to the area, staff mail out packets that contain maps, real estate information, apartment finders, and brochures from sites and businesses of the local area. Most often, we have visitors who come to explore the area for a potential move, and we provide them with a relocation packet, which contains price ranges for neighborhoods, realtor list, schools, banks, medical centers, and social media resources.

**We extensively promote local businesses, including our tours and competitor tour companies, restaurants, art galleries, shops, events, services, walking and nature trails, parks, and playgrounds.** Many visitors want to make their trip to Bluffton fulfilling, so they engage in as many experiences as their time allows. Our focus is on the historic district, but we also send visitors to Palmetto Bluff and other greater Bluffton and Beaufort County destinations. Visitors count on our knowledge to guide them in all their pursuits.

**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, 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.

**In fiscal year (FY) 2019/2020, the Heyward House Museum and Welcome Center served 10,632 total visitors.** Of the total guests that came last fiscal year, **82% were from out-of-town.** Private Residences (30%) were the dominant accommodations, with the remaining visitors staying in hotels (27%), timeshares (23%), rentals (17%) and other (3%). Due to travel restrictions from March-June 2021, few non-locals were visiting, which skewed our percentages of those staying in accommodations other than private residences. **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. During 3 events and rentals, we had the house open for mini tours, so some of our “Other” visitors experienced the welcome center and museum making our impact higher than to the 8,662 information and tour visitors. March-May is our busiest time of the year, with March alone typically accounting for 1500-2000 visitors. Last year, we projected to have the highest visitor numbers once again; however, visitor numbers dropped drastically in March due to COVID-19 and the ones who came were mainly locals. Despite closing the interior to tours and visitors, **our Welcome Center remained open.** When we closed the interior on March 16<sup>th</sup>, we moved our welcome center racks to the back porch, installed plexi-glass in front of the brochures to minimize bending from humidity, and removed the back screen porch door to minimize touch points for visitors. **The welcome center maps and brochures are now available 24/7.** We have a temporary office in the Heyward History Store, so staff can greet guests, provide recommendations, and answer questions. **Personal communication and engagement with visitors are of outmost importance when providing welcome center services.**

**Visitor numbers are slowly rebounding. To date, we have had 5,984 total visitors and project to have a total of 10,000 visitors this fiscal year. Of the 5,594 visitors, 3,777 have been impact visitors and the remaining 2,207 have come for events or rentals. We record visitor information for those we engage with at the Farmer’s market. If they only relax on Common Ground and are not provided maps, they are recorded under Event. We project to have 7,500 total impact visitors this year.**

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.

**Our arched signs and two landscaped entrances** facing Martin Family Park allows for the natural flow of visitors to the back porch. We installed signage on the entrance posts and signs on the front porch to further direct visitors to the welcome center. Common Ground has also become a visual and critical pedestrian link between Martin Family Park and the Welcome Center. Our shaded pavilion, picnic tables, rocking chairs, and benches are often utilized by individuals and small groups to picnic, work, gather and plan their day in the Historic District. When schools closed and more people were working from home, we often had locals sitting at our tables and working on laptops.

*Please find attached copies of our Marketing Plan*

**Our volunteer base is instrumental in our operations.** Our gardeners attend to the grounds with passion, professionalism, and energy. Our docents' age and health put them all at high risk; therefore, we have not brought our docents back to greet guests or conduct tours. When we open the interior of the Heyward House, we expect to have approximately half of our docents ready to return. Interior tours and bringing docents back are contingent on COVID-19 cases and vaccination rates since most of our visitors are not locals and many have recently traveled in an airplane.

*Please find attached copies of our FY 2019/2020 Annual Heyward House Visitor Statistics in chart and table forms, and a chart of the projected Impact Visitor statistics and revenue for the current fiscal 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 administration of a class and exam for all operators/drivers of licensed tour companies operating in the Town of Bluffton and interpretation programs of the Garvin-Garvey House.

**An amendment to MOA 2017-69 was executed last fiscal year and was renewed upon approval of the HBF annual budget presentation at the June Town Council meeting.** Amendment 1 changes from previous years include a summary explanation on key changes between fiscal years, detailed spending and budget items for Accommodations Tax is earmarked, the final report is due by November 15<sup>th</sup>, and HBF will present an annual budget presentation at its January meeting to incorporate Council feedback into our annual ATAX request. Many of the "changes" were already being done but will be expanded upon as requested.

**We began giving tours of the Garvin-Garvey House in October 2017** and had a total of **1,335 visitors in FY 2018-2019**. In **FY 2019/2020, we had 2,115 visitors and last fiscal year we had 1,073 visitors**. We followed the Town of Bluffton's lead to close the interior of the Garvin-Garvey House to visitors. The house is compartmentalized, and the rooms are not sufficiently wide enough for visitors to social distance from other groups or staff. We will hire staff to conduct tours at the Garvin-Garvey House once we receive guidance from the Town and it is appropriate to reopen the house for visitors. We continue to promote visitors view the exterior of the house, look in the windows, read the interpretive signs on the grounds, and visit the Bluffton Oyster Company. The Garvin-Garvey House is included in our editorials in 101 Things to Do.

*Since the Garvin-Garvey House has been closed this fiscal year due to COVID-19, please find attached the visitor statistics in table form for FY 2019/2020. Visitor numbers for Heyward House and Garvin-Garvey House are tabulated separately. Revenue for Garvin-Garvey is also kept separately on the Reconnaissance sheets but are combined with Heyward House tours in our budget.*

**Our Heyward History Store has been closed to visitors; however, we have been selling to visitors looking for specific items we carry. Our store currently includes a temporary office for staff to work and greet guests from the doorway.**

We purchased a monitor for the store, so we can loop videos promoting Bluffton, including our recently finished film on Bluffton history.

**Our Heyward History Store selection** includes a variety of books, children's gifts, Civil War themed gifts and souvenirs and locally made items, such as tea, barbeque sauce, and bakery items. Our children's souvenirs, postcards, books, Civil War-themed items, locally made shea butter, and benne wafers continue to be our best sellers. ***Part of our emphasis for the coming year is to utilize the recently scanned files, maps and documents from the Caldwell Archives, as reprints for sale in the store.***

**Our point of sale system utilizes a tablet**, which among other functions, allows us to easily track inventory and give us a better idea of what sells best so we can grow and modify as our demand changes. Last year we generated \$6,988 in total gift shop revenue, which was a record even without 2.5 months of gift shop sales due to COVID closer. This year to date, we have \$382 in revenue. We expect revenue to dramatically increase once our interior is re-opened.

*Executive Director, Kelly Graham, has been leading all our town walking tours. We had 2,508 visitors take a house tour or walking tour last year and we have had 97 take a porch and grounds or walking tour this year, with another 30 already scheduled for April.*



**We typically encourage school groups to take our walking tours to learn more about the town and the Heyward House; however, public schools are not taking field trips. We had a group from Lowcountry Homeschoolers Association take a porch and grounds tour this fall and have scheduled students from Cross Schools this April.**

As we share our history to the younger generations, those students bring their parents to visit the historic district, who then will bring their out-of-town guests. We already have booked a charter bus group for this fall and have assisted living groups calling to schedule for when we reopen the interior. We expect our typical groups, such as local community organizations, assisted living facilities, conference attendees, hotel buses, timeshare buses, and schools to increase exponentially as more people are vaccinated and people feel safe to venture out in groups.

**Our successful children's series of summer programs** was canceled for 2020.

Summer programs will depend on each camp's measures for COVID-19 and the HBF staff availability to host them. Native American pottery and historic games are typically our most popular. Our other programs include scavenger hunts, storytelling, Heyward House tours, Garvin-Garvey House tours, and nature and history walking tour.

**We regularly conduct outreach to both adult and children's groups.** Kelly presents "*Bluffton 101*" and "*SC Rivers of Rice*" programs to Town of Bluffton Employees several times each fiscal year and to civic groups. Staff planned to participate in Virtual Career Day at River Ridge Academy; however, school was dismissed early that day due to bad weather.

**Staff and volunteers conducted an archaeological excavation at Wright Family Park and washed, analyzed, and cataloged over 3,000 artifacts.** Staff is drafting a report on the excavation, artifacts, and analysis of the site.

**Kelly designed two history walls for the new Burnt Church Distillery, which provide the history of Bluffton and Burnt Church Road through images, text, and sketches.** This exhibit will drive visitors to learn more history and visit the Heyward House and the historic district.

**We provided the Bluffton History Class for Tour Guides to 14 people** last year and to 4 people this year. Those that pass the test receive a certificate of achievement they can turn into the Town of Bluffton to get their business license.

**The HBF Caldwell Archives received a \$4,096 grant from the Daughters of the American Revolution** to fund equipment costs associated with the Caldwell Archives at Town Hall and for digitization of 11 original maps and metadata forms for family files. Equipment costs included moving all archive material into archive quality folders and storage containers, shelving, bookshelves, and a professional photo scanner with transparency base. Our website includes a link to the Caldwell Archives digital files.

The files include maps, plats, surname finding aids, letters, periodicals, and the DAR Bible Project. Digitization of the archives is on-going.

**We have reworked our Archive Fees** to be in-line with other archives in the surrounding area and in South Carolina. Although archive access is free for the public, requests of staff to assist in research or to conduct research for them will cost, since staff time will be required. This is in line with other organizations. The price list includes digitization and use fees for photographs or other documents to be used in social media or print purposes. Low resolution copies of our images and select documents will be available for personal or educational purposes. Although Town Hall is closed to the public, staff can retrieve files for research. Once the public is allowed in Town Hall, staff will be able to spend extended time in archives and may resume bringing 1 person in to conduct research. The room is not spacious; therefore, we will not bring volunteers into our archives room until later in FY2021/2022.

*Please find attached our Caldwell Archives Research and Materials Usage Fees.*

The completion and addition of Common Ground, with two new arched entrances on the recently completed Green Street and Martin Family Park side, has given the grounds new use and revenue. We see value in the community's ability to gather socially and have found that visitors attend in high numbers as well. **Last fiscal year, we held the Boiled Peanut Festival, Historic Cocktail Party, and our own oyster roast.** We cancelled our 2<sup>nd</sup> **Historic Town Party and Film Premier** of Bluffton, South Carolina: A May River State of Mind on March 21, 2020 due to COVID-19. **Our special events created a large (\$20k+) boost in revenue. This fiscal year, we held the Boiled Peanut Festival, Dinner on the Grounds (Arts and Seafood Festival) and the Arts and Seafood two-day "streetfest" was held on Common Ground and adjacent property. Projected event revenue this fiscal year is approximately half of what we had last fiscal year. Visitor numbers and concerns/regulations regarding large gatherings during COVID-19 ensured event revenue** was going to be drastically cut from previous years. This fiscal year we are adding more exterior lighting to the rear of the property to expand our usable space in the evenings. The pavilion space allows us to have many of our children's programs under a covered, shaded area. Our oyster shell sculpture adds an informative history and visual element to our venue.

We released the film on our website and asked for donations to help cover the cost of production. The film brings much joy and marketability to our town and Foundation.

**Visibility, activity, traffic, sponsorships** and connectedness are increasingly viewed as better metrics of growth/support for organizations like ours than traditional 'memberships'. We reach out to organizations in the community once per month on average, we do promote the values of membership and volunteerism during all our



community events and educational programs. We revamped our membership and launched our 2021 membership in July 2018. This 3-year membership is \$150 but it is pro-rated through June 2021, so you only pay for the days left in the membership when you join. We have added over 55 new members since the new program began in 2018, almost doubling paid memberships. Our 2024 membership begins July 1<sup>st</sup>, 2021. Our goal is to retain all our 2021 members and get 50 new 2024 members bringing our total members to 50 Lifetime, 12 complimentary, and 175 paying 2024 members. We will continue to promote Foundation membership and support along with all that we do.

**We have reworked our social media platforms** and dropped those that were not applicable to our mission, such as Instagram, Pinterest, Linked-in, Twitter, and Tumblr. We have seen significant growth since the beginning of this fiscal year for Facebook, with an increase of 2.6%. Our website platform we started using in 2017 will be obsolete in late 2021; therefore, we had a new website built that we will update ourselves, is more user friendly, and visually appealing. We use the Dashboard on our website to record website views. We recorded and published educational videos on our websites. Our videos range from 1–5-minute segments on local history and artifacts. We increasingly view this arena as our most effective means of event promotion and marketing. This demonstrates a shift in a younger demographic segment. (see marketing plan attachment)

**Our Website continues to grow** as a canvas for getting our messages out. Guests can take a virtual tour with a fly-through of every room. Visitors can also access information about the Garvin-Garvey House, the Caldwell Archives, the Historic Bluffton Foundation, and how to join and donate.

*Please find attached a copy of our fiscal year to date Social Media Report.*

**House Maintenance continues to be one of our biggest challenges.** As with any structure but more so with an historic structure, repairs and maintenance are inevitable. Our repairs and maintenance expense line item includes on-going maintenance, such as HVAC and fire safety inspections (lights, cords, and extinguishers) but is predominantly for unexpected repairs, such as a broken door or window, security system malfunctions, rotted wood, irrigation pump failure, or backed up plumbing. When you have thousands of visitors (outside or inside) in a business, it is inevitable that maintenance and repairs will be required. We do as much in-house repairs and maintenance as possible to cut costs; however, quality is important, and we defer to the experts when we are unable to do it ourselves. We painted the outbuildings, touched up sections of the Heyward House, repainted signposts, and stained our high-top oyster tables, benches, and picnic tables. Kelly and volunteers trimmed all the azaleas on the property to ensure proper growth and to make the Heyward House more visitors to traffic and visitors. New herb garden signs were installed with outdoor labels to minimize fading from UV. Two interior doors were also installed inside to help traffic flow and noise control when we reopen.

**Our Capital Plan for next year** includes some items we were not able to do this year. Capital projects in the best interest of the house are considered first before new projects.

We need to replace rotting wood on many of the dormers and soffits on the house. A contractor will be required to complete this work and to paint the new wood. A future capital project will include painting the entire exterior of the house.

**Additional tree removal** or trimming may be necessary, as many of our laurel oaks are nearing the end of their lifespan. The base of a tree along Green Street was cut when the new sidewalk was installed in 2020. Sawtooth marks are clearly visible on the trunk. If the tree continues to deteriorate, it will need to be removed for safety concerns. Depending on the size of the tree when it is removed, tree mitigation may be required and is incorporated in the capital plan. Additional trees may need to be trimmed or removed if they are dying or pose a safety hazard to visitors.

**2. If arts/cultural activity, give specific description of project.** See above.

**3. Impact on or benefit to tourism.** See above.

**4. Duration of Project.** The Welcome Center is operated year around. Prior to this fiscal year, it was only closed on Sundays, 8 holidays throughout the year, and one week in January for a deep clean of the Heyward House and outbuildings. This year, we are not open on Saturdays because we only have 2 staff members and no volunteers; however, our welcome center is now available 24/7 with maps and brochures on the screened back porch.

**5. Permits required:** We are not planning any special events for the Welcome Center; therefore, no permits are required. Special event permits with the Town of Bluffton are sometimes required for non-Welcome Center events that the Historic Bluffton Foundation hosts. We will coordinate with the Town of Bluffton, submit the required documentation, and obtain any required permits for those events.

## **D. FUNDING:**

### **1. Source of funds:**

*Find Revenue Sources listed on attached FY 2021/2022 Annual Operational Budget.*

We obtain accommodations tax grants (Town of Bluffton, State of SC and Beaufort County) to help cover welcome center expenses. Bluffton ATAX reimbursement for HBF expenses for the Welcome Center is based on percentage of non-locals. Each year this is approximately **82%** but is not determined until the end of the fiscal year when final visitor numbers are tabulated.



**HBF is responsible for raising funds** or applying for grants to cover the remaining expenses of the Welcome Center. Some welcome center expenses are covered 100% by other sources than Bluffton ATAX. Part of our gift shop revenue, tours/programs, special events, donations, rental income, and caretaker income are used to pay for welcome center expenses.

**-Town of Bluffton State ATAX may cover expenses** such as salaries and benefits, bank fees, insurance, utilities, programs, advertising and marketing, shipping/postage, office supplies, equipment upgrades, accounting, cleaning services, landscaping, pest control, repairs/maintenance, security, website, capital improvements (\$4,000 for tree and limb removal and mitigation; \$6,000 for shutter and rotted dormer wood repair or replacement).

**-Beaufort County State and Local ATAX-** salaries and benefits, bank fees, insurance, utilities, advertising and marketing, shipping/postage, office supplies, equipment upgrades, accounting, cleaning services, landscaping, pest control, repairs/maintenance, security, website, gift shop

**-HBF-** salaries and benefits, bank fees, insurance, utilities, advertising and marketing, shipping/postage, office supplies, equipment upgrades, accounting, cleaning services, landscaping, pest control, repairs/maintenance, security, website, capital improvements, gift shop, special events, dues and subscriptions (such as Old Town Bluffton Merchant Society), Professional Development (training for docents or staff), interest expenses

## **2. Have you requested funding from other sources or organizations for this project?**

*Yes*

*Beaufort County Accommodations Tax Committee                      Amount:        \$10,000\**

\*In Fall of 2021, we will apply for a State Accommodations Tax grant for the Heyward House (museum and welcome center).

## **3. Contributions to the project by the sponsoring organization:**

*Historic Foundation for the Welcome Center                      Amount: \$33,250*

**We are asking for \$21,000 less in Bluffton State ATAX funding for our operational budget than we did last year**, so we are becoming more self-sustaining. As mentioned earlier, we get approximately 82% reimbursed from invoices and receipts submitted for welcome center expenses and some expenses are not considered reimbursable from the Town A-TAX. HBF covers the rest of the cost by applying for additional grants or from gift shop, tour, program, special events, donations, caretaker, and rental revenue. With the uncertainty about visitors taking tours or having special events next year, *caretaker*

***income, donations, and rentals are our biggest revenue sources for paying our 18% of welcome center expenses.***

The financial impact is unknown; however, it is likely that we will have a higher percentage that come in just for the welcome center and not for tours, so our revenue will be impacted and is reflected in the budget. People may continue to travel but they may not spend money on extras, such as souvenirs or tours.

#### **E. FINANCIAL INFORMATION (ADHERE TO STRICTLY):**

1. Please find attached a copy of our FY 2021/2022 Annual Operational Budget with the current fiscal year to date and projected revenue and expenses included. Our 10-year Capital Plan for the Heyward House is also included.
2. Please find attached the Independent Auditor's report, balance sheet and end-of-year Financial Statement for FY 2019/2012.

#### **F. FINANCIAL GUARANTEES:**

Many of our Board members are considered high risk for complications from COVID-19, so our Board meetings are held electronically. Please find attached a copy of the official February 2021 meeting minutes where the Board of Trustees of the Historic Bluffton Foundation unanimously approved the budget and project and committed to financial responsibility for carrying it out to the stage of completion contemplated in the application, should funding be approved.

#### **G. PRIOR RECIPIENT'S REPORT** (If you received prior ATAX funds): *See our attached report we submitted in July 2020.*

**1. How did you use the funds?** To operate and maintain the Heyward House as the Town's Welcome Center, including sending packages to perspective visitors and residents. Funds were used for Heyward House expenses, such as salaries and benefits, mortgage, 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.

**2. What impact did this have on the community or benefit tourism?** Please see attached copies of our FY 2019/2020 Annual Visitor Statistics in chart and table forms. Of the total number of visitors, only 24% took tours; the remaining came for the Welcome Center: to gather information, maps, and rack cards for local restaurants, hotels, sites, and stores. All visitors receive maps and brochures of Bluffton at the Heyward House.



**Describe how tourism statistics were captured.** 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.

*Please find attached a copy of our reconnaissance forms for tracking visitor statistics.*

**3. Please find attached the previous two years and current year budgets.**

**4. Please find attached the annual comparison of revenue and expenses which compares the years HBF has received Bluffton ATAX funding and the previous year's final report, both of which include tables showing total funds received and total number of visitors per year.**

**H. ADDITIONAL COMMENTS:** (Attach additional sheets, if needed):

*Please find attached a copy of our 501(c) 3 non-profit form.*

Signature:



Kelly Logan Graham, Executive Director of HBF

PO Box 742

Bluffton, SC 29910

(843) 757-6293, (843) 709-0880

### Efficiency Is the Rule

As a non-profit organization, the programs at the Heyward House and for the Bluffton Historical Preservation Society are dependent on an extremely efficient formula that ensures the maximization of budget allocation and spending that meets our goals.

### Data Based Decisions

We begin by investing about 3-5% of our staff time collecting, coding and entering our visitor information into an extremely accurate database that tells us where our traffic is coming from, when and what they are interested in. This allows our focus and budgetary planning to highly target markets and media.

### Free Media Outlets

Our local media are a large part of our messaging outreach. Appearing on local news programs in Hilton Head (WHLI), and Savannah (WSAV, WTOG) have brought our event messaging to a wide regional audience and expose the local TV market to our story. Press releases to over 25 broadcast and print media outlets result in much free exposure and promotion.

### Website

The HeywardHouse.org site represents the HBF organization's primary information fulfillment tool and reaches 82,000 respondents yearly. This website is maintained internally and we make changes and post event information to the site internally. Our blog, which is represented on the website, is written by staff and illustrates the historic points of our narrative in greater detail. Many of our visitors and phone calls originate from online searches.

### Social Media

The incredible power of the internet is portrayed by the growing ranks of our online "audience" who like and follow our social media pages. We find an incredible tool in Facebook posts which contain our own self-generated video clips and graphics. In addition to Facebook, we post regularly on Instagram, which together, reach an online audience of 2,270 users and followers. During the COVID closures, we have maintained a steady viewership on our website.

### Print Collaterals

Our internal capacity for writing, design and production of print materials means that we are on the leading edge of marketing by way of brochures, maps, event posters, flyers and internal signage that aids our delivery of pertinent directional and informational literature. We distribute many pieces of our own, as well as third party-supplied printed brochures, maps and menus in our Welcome Center's retail Museum Store. Our brochures are widely distributed throughout Beaufort County and at all the SC state welcome centers.

### Print and Online Media Buys

Our local saturation strategy for efficient planning and purchases of paid media, include intercept ads in and around Hilton Head Island, which is the main source of visitor traffic. Many vacationers to the island have become regular visitors to Bluffton, and our presence on Hilton Head shows up over and over through our visitor statistics. Paid media buys that continue to produce well for us include a constant presence in the printed and the online visitor guides produced by the Hilton Head Bluffton Chamber of Commerce. We also advertise in local tourist magazines, like "101 Things To Do", and we have a presence on the illustrated map for the area. We have also successfully employed the use of digital billboards, on a regional basis, which provided an extremely cost-effective medium for reaching a drive audience between Beaufort and Savannah.

### Multi-Media Presentations Onsite

A new venture that will give us added reach to capture outdoor foot traffic, is a new series of video tours of the Heyward House and the Town of Bluffton. Our aim is to develop these programs for viewing on a new outdoor video monitor to be installed under our pavilion on Common Ground.



## FY 2019/2020 Heyward House Visitor Statistics

<b>Info</b>	6,154
-------------	-------

<b>Tours</b>	
Women	467
Men	303
Students	13
Children	18
Group	1707
	2,508

<b>Visits by Day</b>	
Mon	1,195
Tues	1,556
Wed	1,184
Thurs	1,843
Fri	1,588
Sat	1,301
	8667

Accommodations		
Hotel	2,366	27%
Timeshare	1,968	23%
Rental	1516	17%
Residence	2581	30%
Other	236	3%
	8667	

<b>Other</b>	
Business	7
Archives	7
Events	1355
Rental	601
	1970

<b>Visits by Time</b>	
Before 10	323
10:00	1,706
11:00	1,500
12:00	1,501
1:00	1,314
2:00	1,108
3:00	817
4:00	398
	8667

<b>Revenue</b>	
Tours	\$13,709
Gift Shop	\$7,157
Members	\$3,631
Archives	\$1,262
Donations	\$2,254
Events	\$22,333
Rental	\$1,647
	\$51,993

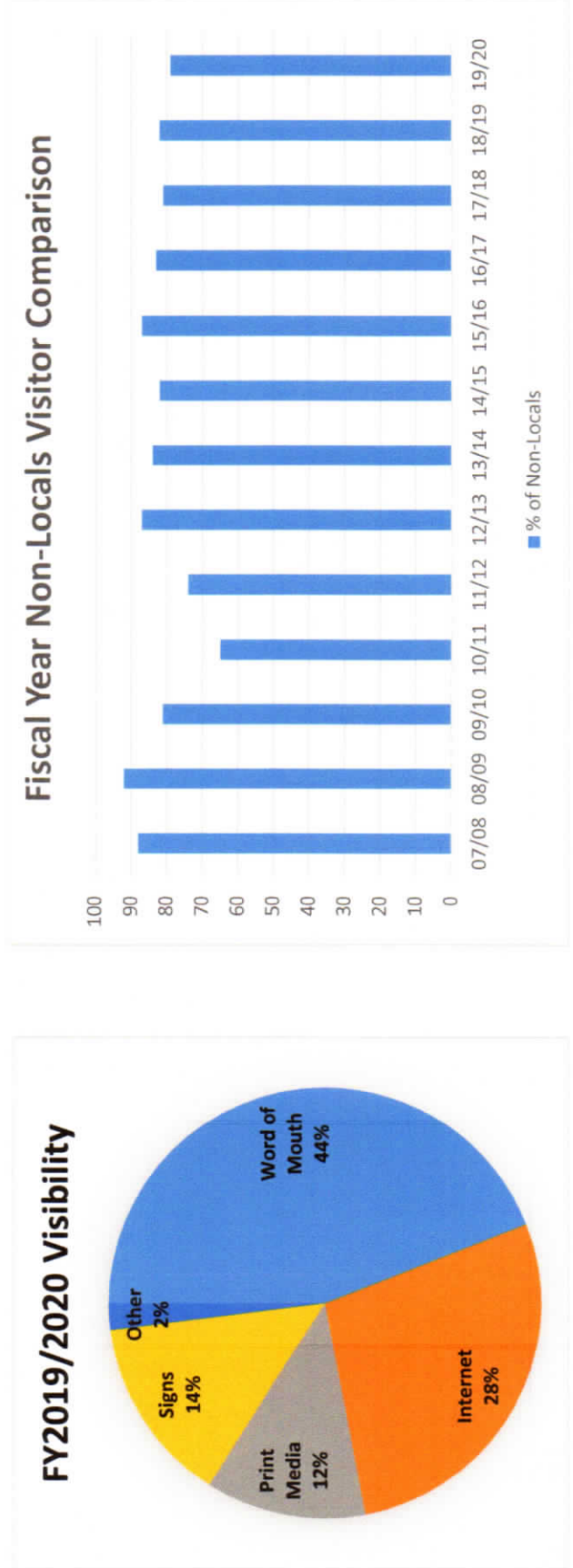
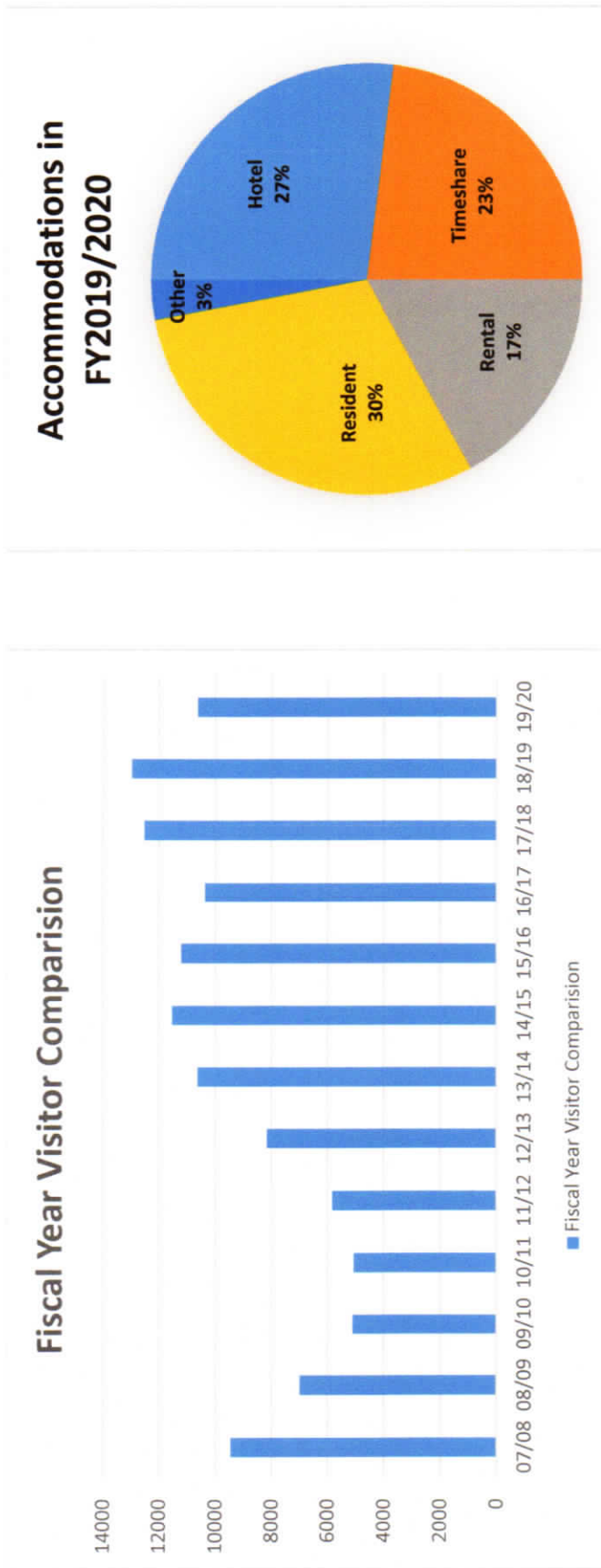
<b>Total Visitors</b>	
TOTAL	10632

Visibility	
Word of mouth	3806
Web/Internet	2419
Print Media	1008
Signs	1240
Radio/TV	6
Other	188
	8667

<b>Visit by Location</b>	
N. East	807
Mid-Atlantic	1,257
S. East	2,244
Mid-West	1,403
N. West	121
S. West	258
West	331
Local	1,803
Other	443
	8667

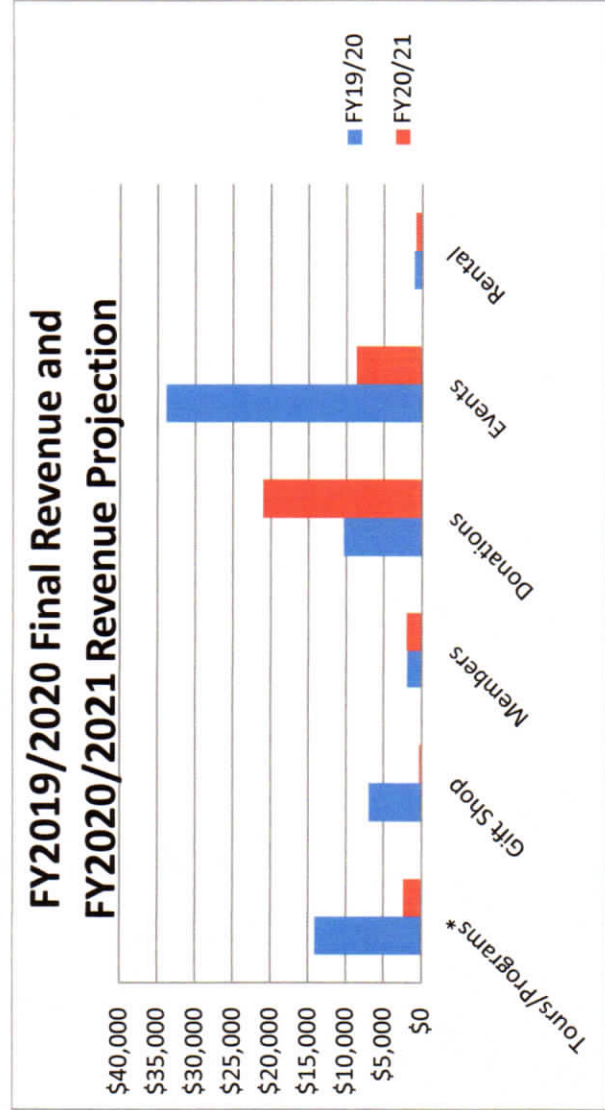
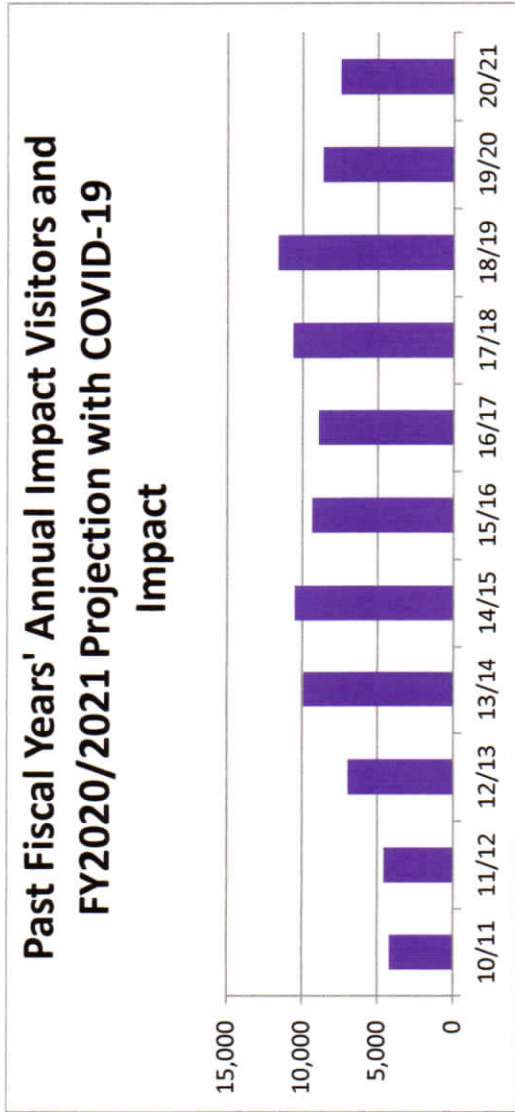
<b>Yearly Comparison</b>	
FY2019/2020	10632
FY2018/2019	12968
FY2017/2018	12524
FY2016/2017	10374
FY2015/2016	11215
FY2014/2015	11539
FY2013/2014	10636
FY2012/2013	8148
FY2011/2012	5825
FY2010/2011	5066

# Heyward House Museum and Welcome Center Visitor Data for FY2019/2020





Projected Data for Heyward House Museum and Welcome Center in FY2020/2021



\*FY2019/2020 includes Heyward House and Garvin-Garvey House Tours/Programs Revenue

## FY2019/2020 Garvin-Garvey House Visitor Statistics

<b>Info</b>	635
-------------	-----

<b>Tours</b>	
Women	221
Men	167
Students	0
Children	0
Group	203
	591

<b>Visits by Day</b>	
Mon	0
Tues	505
Wed	0
Thurs	667
Fri	54
Sat	0
	1226

<b>Accommodations</b>		
Hotel	220	18%
Timeshare	263	21%
Rental	274	22%
Residence	457	37%
Other	12	1%
	1226	

<b>Other</b>	
Business	0
Archives	0
Events	0
	0

<b>Total Visitors</b>	
TOTAL	1226

<b>Visits by Time</b>	
Before 10	43
10:00	290
11:00	152
12:00	138
1:00	160
2:00	151
3:00	134
4:00	158
	1226

<b>Revenue</b>	
Tours	\$1,550
Gift Shop	\$10
Members	\$10
Archives	\$0
Donations	\$0
Events	\$0
	\$1,570

<b>Visibility</b>		
Word of mouth	488	40%
Web/Internet	228	19%
Print Media	226	18%
Signs	250	20%
Radio/TV	6	0%
Other	28	2%
	1226	

<b>Visit by Location</b>	
N. East	112
Mid-Atlantic	104
S. East	238
Mid-West	188
N. West	17
S. West	39
West	67
Local	408
Other	53
	1226

<b>Yearly Comparison</b>	
FY2019/2020	1226
FY2018/2019	2115
FY2017/2018	1335



HISTORIC BLUFFTON FOUNDATION  
A TAX-EXEMPT, NOT-FOR-PROFIT ORGANIZATION



*Updated March 2020*

*Page 1 of 2 Price list is subject to change*

## **Research and Materials Usage Fees for the Caldwell Archives**

*A written summary of the times/items requested, and their purpose and intent of usage parameters are required from the user, before time can be scheduled.*

### **RESEARCH FEES**

Doing research in the Caldwell Archives is done by appointment and scheduling through the HBF staff.

**Self research** - 1 hour free; past 1 hour-\$5/hr. Members - \$10/hr. non-members

**Staff research fee** -basic search of 1 individual, building, or narrow, well-defined question - 1st hour free; >1hr. \$10/hr. member, \$15 non-member; includes a brief written summary and up to 5 photocopies

### **USAGE FEES**

Use in any public medium of Historic Bluffton Foundation's visual materials requires written permission from the HBF. A fee will be charged for each image used. These fees are separate from, and in addition to, image reproduction charges. Fees for orders using multiple images may be negotiable. A signed Usage Request Form must be received by the Executive Director prior to the use of our materials. All responsibility for questions of copyright is assumed by the user. A Letter of Permission to Publish will be issued by the Historic Bluffton Foundation, granting specific rights. A copy of any publication, video, or computer software using images from the HBF, Inc. collections must be donated to the Bluffton Historical Preservation Society. All fees are subject to change. A credit line with each image should read: Historic Bluffton Foundation, plus the collection number if applicable.

### **PURCHASE OF SCANNED IMAGES DOES NOT CONSTITUTE PERMISSION TO PUBLISH; PERMISSION MUST BE OBTAINED IN WRITING.**

### **DIGITIZATION FEES**

All scanning of material from the collection of the Historic Bluffton Foundation is completed by HBF, Inc. staff. Eligibility for item scanning is based upon the condition and size (up to 11X17 inches) of the item. Images can be saved in TIF or JPG formats. If no format or resolution is specified, images will be saved in TIF/IBM and scanned at 300 dpi.

**Standard Resolution fee per image**                      **\$50**

*Excess Image Discount - for scan requests in excess of 6 or more images, a 5% discount (excluding taxes and service charges) will apply.*

### **PRE-PAYMENT IS REQUIRED FOR ORDERS TO BE PROCESSED.**

Shipping & Handling: Will be applied according to requested methods.

*Turn-Around Time: Please allow 20 working days for each order. Orders in excess of 15 scans may require additional turn-around time.*

HISTORIC BLUFFTON FOUNDATION  
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*Updated March 2020*

*Page 2 of 2*

## **Materials Usage Fees for the Caldwell Archives**

### **Digital file fee**

\$30 per image for born digital; 5% discount for 6 or more images; 8" x 10" prints \$35@

### **Print Media/Editorial/Commercial Use (includes textbooks)**

No fee for SC print media (newspapers); 100,000 or more requires negotiation

Print Media \$50@

Cover/jacket surcharge \$200

**Email or telephone photocopy request** \*shipping/handling in addition to fee  
Commercial Advertising/Merchandising, display or exhibit, requires negotiation.  
\$5 flat fee

### **Copies**

\$.25@; member copies free up to 25

**Forms required** may include: patron registration form; basic search form; photocopy/scan request form

*Non-profit organizations receive a rate of 15% off the commercial use rates above*

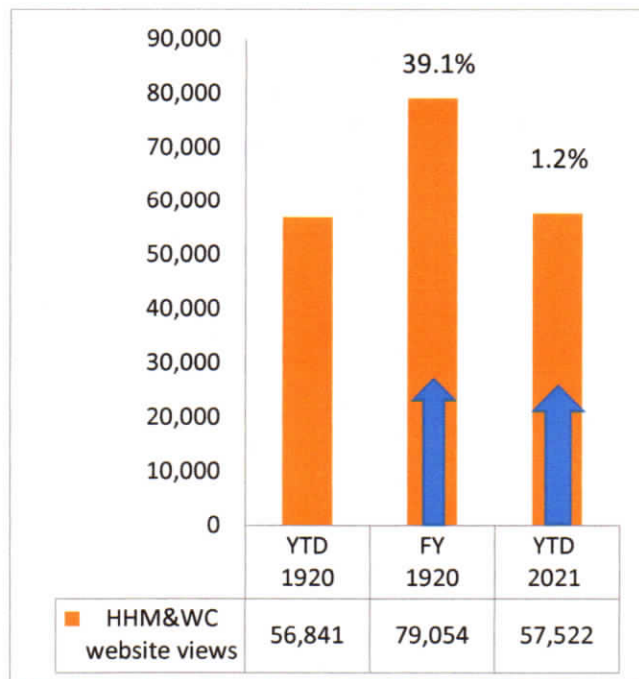
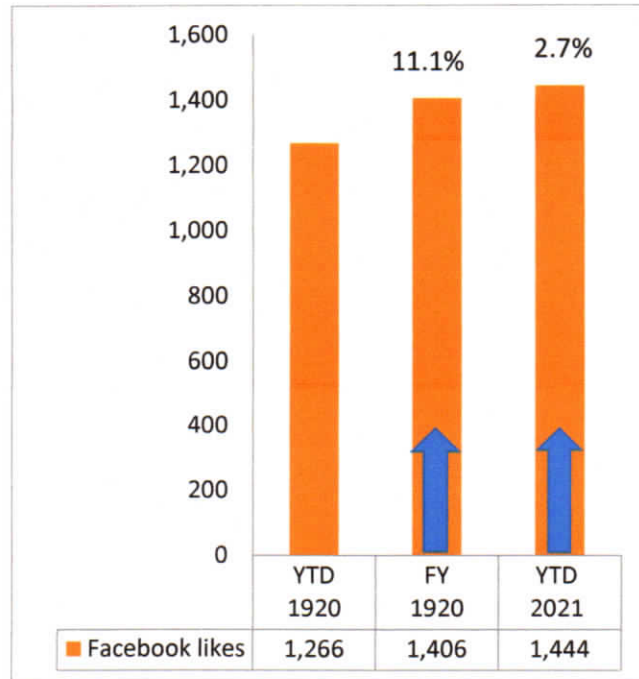
### ***FEES ARE PER IMAGE, ONE TIME USE ONLY***

*Failure to comply with these conditions, copyright restrictions, and proper image credit will result in legal penalties, including fines.*

**For more information, please contact Kelly Graham, Executive Director, at  
Kelly@heywardhouse.org, 843-757-6293 or P.O. Box 742, Bluffton, SC 29910**



## Heyward House Museum &amp; Welcome Center FY20/21 Year to Date Social Media Report &amp; Comparison



\*Comparison of website views is based on Year-to-date views in FY2019/2020, since the total resets July 1<sup>st</sup> each year.

Historic Bluffton Foundation  
Approved Operational Budget with current year projections  
Fiscal Year 2021-2022

	February 2021 YTD Actual	FY2020-2021 Projection	FY2020-2021 Total Budget	Welcome Center		HBF Only Budget
				Total Budget	Only Budget	
<b>Revenues</b>						
Grants						
Private Foundations	50,139	53,000	8,000	8,000		8,000
Town of Bluffton ATAX	91,939	110,000	190,000	190,000		
Beaufort County ATAX		17,000	10,000	5,000		5,000
Total Grant Income	\$ 142,078	\$ 180,000	208,000	195,000		13,000
Sales and Service Revenues						
Gift Shop	206	300	8,000	4,000		4,000
Memberships	\$ 402	\$ 2,000	1,200	1,200		1,200
Tours/Programs	1,883	2,400	18,000	15,000		3,000
Special Events	\$ 8,670	\$ 8,670	7,000	3,000		4,000
Total Sales & Service	\$ 11,161	\$ 13,370	34,200	22,000		12,200
Other Revenues						
Colcock-Teel Endowment	\$ -	\$ 3,700	5,000	5,000		
Misc. Income	\$ 5,000	\$ 5,000				
Archival Income	-	-	1,800	1,800		
Donations	15,897	21,000	8,000	4,000		4,000
Rental Income	425	800	10,000	4,000		6,000
Caretaker Income						
Total Revenues	\$ 21,322	\$ 30,500	24,800	8,000		16,800
	\$ 174,561	\$ 223,870	267,000	225,000		42,000
<b>Expenditures and Other Uses</b>						
Salaries & Benefits	77,027	110,000	150,000	130,000		20,000
Mortgage			4,000	3,500		500
Interest Expenses	542	650	2,500	1,500		1,000
Archives			1,000	1,000		
Bank Fees	488	700	1,600	1,400		200
Insurance	10806	11,000	13,000	11,000		2,000
Utilities	9,851	15,000	17,500	17,000		500
Gift Shop Expenses		500	6,000	4,000		2,000
Special Events	1,539	1,600	1,200	400		800
Programs	3,377	4,000	2,000	2,000		
Advertising and Marketing	7,501	12,000	5,000	4,500		500
Shipping/Postage	298	500	1,200	1,000		200
Dues & Subscriptions	205	500	1,000	500		500
Office Supplies	952	1,300	2,000	1,750		250
Equipment Upgrades	2,084	2,300	4,500	4,000		500
Professional Development	282	350	1,000	200		800
Contract Services						
Accounting	8,900	10,500	13,500	12,000		1,500
Cleaning Services	300	600	1,800	1,600		200
Consulting Services			500	500		
Landscaping	27	4,000	4,000	3,500		500
Pest Control			900	750		150
Repairs/Maintenance	4391	7,000	10,000	9,000		1,000
Security		300	300	150		150
Website	2,409	2,850	2,500	2,250		250
Capital Improvements	519	12,000	20,000	13,000		7,000
Total Expenditures and Other Uses	\$ 131,498	\$ 197,650	267,000	225,000		42,000
Revenues Over/(Under) Expenditures	\$ 43,063	26,220				

	Approved 2021-2022 Budget			HBF Only Budget
	Total Budget	Welcome Center Only Budget		
	8,000	1,250		8,000
	169,000	169,000		
	\$ 187,000	\$ 174,000		\$ 5,000
				13,000
	\$ 1,500			250
	\$ 10,050	3,500		10,050
	\$ 7,000	3,500		3,500
	\$ 25,550	8,250		3,500
				17,300
	\$ 10,000			10,000
	500			500
	9,000	5,250		3,500
	7,500	3,750		3,750
	21,600	16,000		5,600
	\$ 48,600	25,000		23,350
	\$ 260,900	207,250		53,650
	150,000	130,000		20,000
	1,000	500		500
	1,000			1,000
	1,600	1,400		200
	14,000	12,000		2,000
	17,500	14,000		3,500
	1,000	500		500
	1,500	750		750
	2,250	2,250		
	5,000	4,000		1,000
	1,200	1,000		200
	1,250	500		750
	2,000	1,750		250
	5,000	4,000		1,000
	1,000	300		700
	13,500	11,000		2,500
	1,800	1,600		200
	500			500
	4,000	3,500		500
	1,000	750		250
	10,000	6,100		3,900
	300	150		150
	1,500	1,200		300
	23,000	10,000		13,000
	\$ 260,900	207,250		53,650



*\*Revised March 2020*

**HISTORIC BLUFFTON FOUNDATION**

BLUFFTON, SOUTH CAROLINA

INDEPENDENT AUDITOR'S REPORT  
AND  
FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019



**BLUFFTON HISTORICAL PRESERVATION SOCIETY, INC.**

BLUFFTON, SOUTH CAROLINA

INDEPENDENT AUDITOR'S REPORT

AND

FINANCIAL STATEMENTS

**CONTENTS**

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Statement of Activities	3 - 4
Statement of Function Expenses	5
Statement of Cash Flows	6
Notes to Financial Statements	7 – 12

# REBECCA S. BRASSEUR

CERTIFIED PUBLIC ACCOUNTANT

## INDEPENDENT AUDITOR'S REPORT

To the Board of Directors of  
Historic Bluffton Foundation:

I have audited the accompanying statements of Historic Bluffton Foundation (a nonprofit organization) which comprise the statements of financial position as of June 30, 2020 and 2019, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### **Auditor's Responsibility**

My responsibility is to express an opinion on these financial statements based on my audit. I conducted my audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that I plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, I express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my audit opinion.

### **Opinion**

In my opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Bluffton Historical Preservation Society, Inc. as of June 30, 2020 and 2019, and the changes in its net assets and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

*Rebecca S. Brasseur, CPA PA*  
Bluffton, South Carolina 29910  
January 7, 2021

Post Office Box 2598, Bluffton, South Carolina 29910

843-301-4429 rsbrasseur@gmail.com



**HISTORIC BLUFFTON FOUNDATION**  
**STATEMENT OF FINANCIAL POSITION**  
**AS OF JUNE 30, 2020 AND 2019**

ASSETS	2020	2019
Cash and cash equivalents	\$ 25,604	\$ 12,516
Utility deposits	300	300
Promises to give	2,398	4,096
Prepaid payroll taxes	1,512	-
Art collection	12,500	12,500
Property and equipment (net)	<u>970,501</u>	<u>964,884</u>
Total Assets	<u>\$ 1,012,815</u>	<u>\$ 994,296</u>
LIABILITIES AND NET ASSETS		
LIABILITIES		
Accounts payable	\$ 3,641	\$ 165
Accrued payroll liabilities	-	2,325
Rental income paid in advance	800	-
Line of credit	15,555	38,343
Note Payable - SBA PPP Loan	26,600	-
Note payable	<u>1,376</u>	<u>9,977</u>
Total liabilities	<u>47,972</u>	<u>50,810</u>
NET ASSETS		
Net assets		
Without donor restrictions	609,237	600,501
With donor restrictions	<u>355,606</u>	<u>342,985</u>
Total net assets	<u>964,843</u>	<u>943,486</u>
Total liabilities and net assets	<u>\$ 1,012,815</u>	<u>\$ 994,296</u>

The accompanying notes are an integral part of these financial statements.

**HISTORIC BLUFFTON FOUNDATION**  
**CONSOLIDATED STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS**  
**FOR THE YEAR ENDED JUNE 30, 2020**

	Without Donor Restrictions	With Donor Restrictions	Total
<b>Support &amp; Revenues</b>			
<b>Support</b>			
Public support:			
Beaufort County, ATAX	\$ 10,000	\$ 10,000	\$ 20,000
Town of Bluffton, ATAX	135,496	-	135,496
Grants	17,632	5,350	22,982
Membership dues	1,919	-	1,919
Donations	10,322	-	10,322
Archives	621	-	621
Total public support	175,990	15,350	191,340
Revenues:			
Gift shop income	6,988	-	6,988
Rental income	12,022	-	12,022
Special events	34,368	-	34,368
Heyward House admissions	14,124	-	14,124
Net assets released from restrictions:			
Satisfaction of program restrictions	2,730	(2,729)	1
Total Support & Revenues	246,222	12,621	258,843
<b>Expenses</b>			
Program services	102,336	-	102,336
Management and general	116,636	-	116,636
Fundraising	18,514	-	18,514
Total expenses	237,486	-	237,486
<b>Changes in Net Assets</b>	8,736	12,621	21,357
<b>Net Assets</b>			
Beginning of year	600,501	342,985	943,486
End of Year	\$ 609,237	\$ 355,606	\$ 964,843

The accompanying notes are an integral part of these financial statements.



**HISTORIC BLUFFTON FOUNDATION**  
**CONSOLIDATED STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS**  
**FOR THE YEAR ENDED JUNE 30, 2019**

	Without Donor Restrictions	With Donor Restrictions	Total
Support & Revenues			
Support			
Public support:			
Beaufort County, ATAX	\$ 10,000	\$ -	\$ 10,000
Town of Bluffton, ATAX	182,755	-	182,755
DAR Archives grant	-	4,096	4,096
Membership dues	6,840	-	6,840
Donations	5,880	-	5,880
Total public support	205,475	4,096	209,571
Revenues:			
Gift shop income	8,780	-	8,780
Special events	11,635	-	11,635
Heyward House admissions	22,834	-	22,834
Total Support & Revenues	248,724	4,096	252,820
Expenses			
Program services	103,682	-	103,682
Management and general	128,000	-	128,000
Fundraising	6,030	-	6,030
Total expenses	237,712	-	237,712
Changes in Net Assets	11,012	4,096	15,108
Net Assets			
Beginning of year	589,489	338,889	928,378
End of Year	\$ 600,501	\$ 342,985	\$ 943,486

The accompanying notes are an integral part of these financial statements.

**HISTORIC BLUFFTON FOUNDATION**  
**STATEMENT OF FUNCTIONAL EXPENSES**  
**FOR THE YEARS ENDED JUNE 30, 2020 AND 2019**

				<u>June 30, 2019</u>
	Program Services	Management & General	Fundraising	Total
Salaries	\$ 41,825	\$ 84,948	\$ -	\$ 126,773
Payroll taxes	3,255	6,543	-	9,798
Professional fees	-	9,650	-	9,650
Administrative	-	10,052	-	10,052
Utilities	15,135	-	-	15,135
Telephone	-	4,510	-	4,510
Gift shop expense	2,979	-	-	2,979
Depreciation	-	2,653	-	2,653
Occupancy	29,186	6,124	-	35,310
Interest paid	-	2,655	-	2,655
Advertising and marketing	9,432	-	-	9,432
Membership dues	-	865	-	865
Special events expense	-	-	6,030	6,030
Restoration project expenses	-	-	-	-
Program expense	<u>1,870</u>	<u>-</u>	<u>-</u>	<u>1,870</u>
	<u>\$ 103,682</u>	<u>\$ 128,000</u>	<u>\$ 6,030</u>	<u>\$ 237,712</u>

				<u>June 30, 2020</u>
	Program Services	Management & General	Fundraising	Total
Salaries	\$ 45,108	\$ 83,320	\$ -	\$ 128,428
Payroll taxes	3,506	6,604	-	10,110
Professional fees	-	9,650	-	9,650
Administrative	-	4,630	-	4,630
Utilities	13,970	-	-	13,970
Telephone	-	2,820	-	2,820
Gift shop expense	5,636	-	-	5,636
Depreciation	-	4,318	-	4,318
Occupancy	18,010	594	-	18,604
Interest paid	-	2,125	-	2,125
Advertising and marketing	4,029	-	-	4,029
Membership dues	-	975	-	975
Special events expense	-	-	18,514	18,514
Supplies	5,367	1,600	-	6,967
Program expense	<u>6,710</u>	<u>-</u>	<u>-</u>	<u>6,710</u>
	<u>\$ 102,336</u>	<u>\$ 116,636</u>	<u>\$ 18,514</u>	<u>\$ 237,486</u>

The accompanying notes are an integral part of these financial statements.



**HISTORIC BLUFFTON FOUNDATION**  
**STATEMENT OF CASH FLOWS**  
**FOR THE YEARS ENDED JUNE 30, 2020 AND 2019**

	<u>6/30/2020</u>	<u>6/30/2019</u>
<b>Cash Flows From Operating Activities:</b>		
Increase (Decrease) in net assets	\$ 21,356	\$ 15,108
Adjustments to reconcile increase (decrease) net assets to net cash provided by (used in) operating activities:		
Depreciation	4,318	2,653
(Increase) decrease in:		
Receivables	1,698	(4,096)
Prepaid payroll taxes	(1,512)	-
Increase (decrease) in:		
Accounts payable	3,476	(245)
Prepaid rental income	800	
Accrued payroll expenses	(2,325)	101
Line of credit	(22,788)	32,343
SBA - PPP Loan	26,600	-
Note payable	(8,601)	(8,180)
Net cash provided (used) by operating activities	<u>23,022</u>	<u>37,684</u>
<b>Cash Flows From Investing Activities:</b>		
Purchases of Fixed Assets	(9,934)	(45,880)
Deposits on Fixed Assets	-	-
Restoration of Heyward House	-	-
Net cash provided (used) by investing activities	<u>(9,934)</u>	<u>(45,880)</u>
Net increase (decrease) in cash and cash equivalents	13,088	(8,196)
Cash and cash equivalents, beginning of year	<u>12,516</u>	<u>20,712</u>
Cash and cash equivalents, end of year	<u>\$ 25,604</u>	<u>\$ 12,516</u>
<b>Supplementary cash flow information:</b>		
Cash paid for interest	<u>\$ 2,126</u>	<u>\$ 2,655</u>
Cash paid for income taxes	<u>\$ -</u>	<u>\$ -</u>

The accompanying notes are an integral part of these financial statements.

**HISTORIC BLUFFTON FOUNDATION  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2020 AND 2019**

**NOTE 1 – NATURE OF ACTIVITIES AND SIGNIFICANT ACCOUNTING POLICIES**

**Nature of Activities**

Historic Bluffton Foundation (f/k/a Bluffton Historical Preservation Society, Inc.) (the Organization) is a local nonprofit organization was incorporated in 1981 whose purpose is to protect, preserve and promote the cultural heritage of the town of Bluffton, South Carolina through education, marketing, hands on preservation of buildings and sites, maintenance of the Caldwell archives and operation of the Heyward Historic Center.

**Basis of Presentation**

The financial statements of the Organization are presented in accordance with Financial Accounting Standards Board ("FASB") Accounting Standards Codification ("ASC") 958-505 Not-for-Profit Entities, Presentation of Financial Statements. During fiscal year starting 7/1/18, the Organization adopted the provisions of Accounting Standards Update ("ASU") 2016-14 Not-for-Profit Entities (Topic 958) Presentation of Financial Statements for Not-for-Profit Entities, which improves the current net asset classification and the related information presented in the financial statements and notes about the Organization's liquidity, financial performance, and cash flows.

**Accounting Method**

The Organization maintains its books on the accrual basis of accounting whereby revenues are recognized when earned and expenses are recognized when incurred, in accordance with generally accepted accounting principles.

**Promises to Give**

Contributions are recognized when the donor makes a promise to give to the Organization, that is, in substance, unconditional. Contributions that are restricted by the donor are reported as increases in net assets without donor restrictions if the restrictions expire in the fiscal year in which the contributions are recognized. Restrictions on the use of or the funding period may require the organization to classify the promise to give as net assets with donor restrictions. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions.

**In-Kind Contributions**

The Organization reports revenue for the fair value of contributed services received where the services require specialized skills, are provided by individuals possessing these skill, and represent services that would have been purchased had the not been donated. In-kind contributions of equipment and other materials are recorded at the fair value of the items contributed. During the years ended June 30, 2020, and 2019, the Organization did not receive and in-kind donations.

**Estimates**

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported accounts and disclosures. Accordingly, actual results could differ from those estimates.

**HISTORIC BLUFFTON FOUNDATION  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2020 AND 2019**

Property & Equipment

Purchased property, equipment and improvements to the common ground are capitalized at cost. Donations of property and equipment are recorded as contributions at the estimated fair value. Depreciation is not required on the historical homes and renovations to them since these assets are considered inexhaustible. The estimated useful life is so long that it cannot be determined. Computers, office furnishings, and improvements to the common ground are however being depreciated using a straight line method over estimated useful lives ranging 5 to 20 years.

Long-lived assets are reviewed for impairment whenever events or changes in the circumstances indicate that the carrying amount of an asset may not be recoverable. Recoverability of assets to be held and used is measured by a comparison of the carrying amount of an assets to future net cash flows expected to be generated by the asset. If such assets are considered to be impaired, the impairment to be recognized is measured by the amount by which the carrying amount of the assets exceeds the fair value of the assets.

Contributions, Gifts and Grants

Contributions received are recorded as net assets with donor restrictions or net assets without donor restrictions, depending on the existence or nature of any donor restrictions.

Income Tax Status

The Organization is exempt from federal income tax under Section 501 (c) (3) of the Internal Revenue Code. However, income from certain activities not directly related to the Organization's tax-exempt purpose is subject to taxation as unrelated business income. In addition, the Organization qualifies for the charitable contribution deduction under Section 170(b) (1) (A) and has been classified as an organization other than a private foundation under Section 509 (a) (2).

The Organization has evaluated its tax positions for all open tax years. Currently, the tax years open and subject to examination by the Internal Revenue Services are fiscal years 2018, 2019, and 2020. However, the Organization is not currently under audit nor has the Organization been contacted by any jurisdiction. Generally accepted accounting principles require tax effects from an uncertain tax position to be recognized in the financial statements only if the position is more likely than not to be sustained if the position were to be challenged by a taxing authority. The Organization does not believe there are any material uncertain tax positions and, accordingly, it will not recognize any liability for unrecognized tax benefits.

Cash and Cash Equivalents

For the purposes of the statements of cash flows, the Organization considers all highly liquids investments available for current use with an initial maturity of three months or less to be cash equivalents.

Concentrations of Revenue

The Organization relies on support from The Town of Bluffton Accommodations Tax (ATAX) grant funds in order to accomplish its objectives. For the years ended June 30, 2020, and 2019, the Organization received \$ 135,496 and \$ 182,755 respectively, in ATAX grants from the Town of Bluffton.



HISTORIC BLUFFTON FOUNDATION  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2020 AND 2019

Functional Expenses

The costs of providing various programs and supporting services have been summarized on the statement of activities and changes in net assets on a functional basis. Most expenses can be directly allocated to one of the programs or supporting functions. Certain categories of expenses are attributed to more than one program or supporting function. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. The expenses in this category include salaries, payroll taxes, and occupancy costs. The basis of allocation of these expenses is based on estimates provided by management.

Recently Issued Accounting Standards

In August 2016, the FASB issued ASU 2016-14 *Not-for-Profit Entities (Topic 958): presentation of Financial Statements for Not-for-Profit Entities*, which changes the current guidance for assets classification, governing board designations, investment return, underwater endowment funds, expenses, liquidity and presentation of operating cash flows. ASU 2016-14 reduces the required number of classes of net assets from three to two: net assets with donor restrictions and net assets without donor restrictions.

ASU 2016-14 also requires not-for-profit entities to provide enhanced disclosures about the amounts and purposes of governing board designations and appropriations. ASU 2016-14 requires not-for-profits to report investment return net of external and direct internal investment expenses. The requirement to disclose those netted expenses is eliminated.

In addition to the current required disclosure of the aggregate amount by which endowment funds are underwater, ASU 2016-14 requires not-for-profit entities to disclose the aggregate fair value of such funds as well as the aggregate original gift amounts to be maintained.

ASU 2016-14 also requires an NFP to disclose its interpretation of the ability to spend from underwater endowment funds including its policy, and any actions taken during the period, concerning appropriation from underwater endowment funds. All underwater endowment funds will be classified as a part of net assets with donor restrictions rather than as a change to unrestricted net assets as per the current rules. In the absence of explicit donor restrictions, ASU 2016-14 requires not-for-profit entities to use the place-in-service approach to approach for capital gifts. The current option to use the over-time approach has been eliminated.

ASU 2016-14 requires expenses to be reported by nature in addition to function and include an analysis of expenses by both nature and function. The methods used by not-for-profit entities to allocate costs amount program and support functions will also need to be disclosed.

ASU 2016-14 requires not-for-profit entities to provide both qualitative and quantitative information on management of liquid available resources and the ability to cover short-term cash needs within one year of the balance sheet date.

Finally, current standards allow for not-for-profit entities to decide whether to present operating cash flows using either the direct method or indirect method. ASU 2016-14 eliminates the requirement to present or disclose the indirect method of reconciliation if the entity decides to use the direct method.

ASU 2016-14 is effective for annual reporting periods beginning after December 15, 2017. Early adoption is permitted with retrospective application required for all prior periods presented. The Organization has adopted the provisions of ASU 2016-14.

**HISTORIC BLUFFTON FOUNDATION  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2020 AND 2019**

**NOTE 2 – PROPERTY AND EQUIPMENT**

Property and Equipment as of June 30, 2020, and 2019 consists of the following:

	<u>6/30/20</u>	<u>6/30/19</u>
Teel House – Restricted	\$ 338,889	\$ 338,889
Heyward House	300,000	300,000
Heyward House – Renovations	247,412	246,228
Heyward House – Common ground improv.	47,225	44,035
Furniture, fixtures and equipment	39,807	34,245
Vehicles	<u>5,000</u>	<u>5,000</u>
Total	978,333	968,397
Accumulated depreciation	<u>(7,832)</u>	<u>(3,513)</u>
Total	<u>\$ 970,501</u>	<u>\$ 964,884</u>

The Colcock-Teel House is restricted as to the use for historical purposes.

**NOTE 3 – LIQUIDITY AND AVAILABILITY OF FUNDS**

The Organization's financial assets available for general expenditures, that is, without donor or other restrictions limiting their use, within one year of the statement of financial position date, are as follows:

	<u>6/30/20</u>	<u>6/30/19</u>
Cash – operating	\$ 25,604	\$ 12,516
Promises to give	<u>2,398</u>	<u>4,096</u>
Total financial assets available to meet Expenditures within the next 12 months	<u>\$ 28,002</u>	<u>\$ 16,612</u>

In addition, the Organization receives public support from the town of Bluffton (ATAX) and Beaufort County (ATAX) to fund general expenditures. The Organization was recently notified that it has been approved for a grant from the SC Cares Act. (See Note 11)

**NOTE 4 – NOTE PAYABLE**

On August 13, 2015, the Organization renewed a note payable with a financial institution for \$39,262 with a fixed interest rate of 5% and a maturity date of August 13, 2020. Principal and interest payments of \$742 are due on the 13<sup>th</sup> of the month. The note is secured by a negative pledge on the owner-occupied real estate, known as the Heyward House.

Principal payments for the years ended June 30, 2020 and 2019 were \$ 8,602 and \$ 8,181, respectively. Interest payments for the years ended June 30, 2020 and 2019 were \$ 891 and \$727, respectively. The balance of the note payable as of June 30, 2020 and June 30, 2019 was \$ 1,376 and \$ 9,977 respectively.

**NOTE 5 – LINE OF CREDIT**

Line of Credit Renewal - On December 11, 2019, the Organization renewed its' line of credit with Coastal States Bank with a maturity date of November 30, 2020. The terms are as follows: credit line \$50,000, interest rate 6.25%. Interest payments are due monthly, with outstanding principal and interest due on November 30, 2020.

**HISTORIC BLUFFTON FOUNDATION  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2020 AND 2019**

The Line of Credit balances for the years ended June 30, 2020 and 2019 were \$ 15,555 and \$ 38,343 respectively. Interest and renewal fees payments for the years ended June 30, 2020 and 2019 were \$1,235 and \$1,928 respectively.

**NOTE 6 – COVID19 & PPP LOAN**

The Heyward House Welcome Center and Historic Home closed by order of Governor Henry McMaster on March 17, 2020. In addition all scheduled events have been postponed resulting in a loss of income.

PPP Loan – The Organization received \$ 26,600 on May 5, 2020 as part of the payroll protection loan program administered by the SBA.

**NOTE 7 – RELATED PARTY TRANSACTIONS**

The treasurer of the Organization is also a vice-president at the bank in which the organization holds a majority of its accounts. The treasurer or the organization do not receive any financial benefit from the banking arrangement. Effective October 2020, the treasurer is no longer affiliated with that bank.

The treasurer of the Organization is married to the Mayor of Bluffton. The Organization receives a major portion of it's funding through the town of Bluffton ATAX. The Mayor recuses herself with any financial dealings involving the Organization.

**NOTE 8 – COLCOCK-TEEL HOUSE ENDOWMENT FUND**

The Designated Fund Agreement was made and entered into by and between the Organization and the Community Foundation of the Lowcountry. The fund is administered by the Community Foundation of the Lowcountry. The mission of the fund is to provide a permanent source of income to support the Colcock-Teel House. The purpose of the fund is to provide grants made in fulfillment of the mission of the fund. Initial contribution of \$100,000 was made on April 25, 2011, and is on the books of the Community Foundation of the Lowcountry. For the years ended June 30, 2020 and 2019, the Organization received \$ 14,382 and \$ 0 respectively.

**NOTE 9 – CARETAKER AGREEMENT COLCOCK-TEEL HOUSE**

Caretaker Agreement – On July 19, 2019, the Organization signed a residential caretaker agreement with Jared Jester to occupy the Teel House for a period of two years beginning on September 1, 2019 and ending on August 30, 2021. In consideration of the occupancy and the use of the Premises, the caretaker shall pay a monthly rental of \$1,800 for the first 3 months or \$ 4,500 to be paid in advance upon the execution of the agreement. Monthly payments shall begin on December 1, 2019. The following 9 months (December 2019 – August 2020) will be at a rate of \$800 with a \$1,000 monthly reduction towards balance of needed safety/hazards updates.

Total rent to be paid year 1 – 12,600

Total towards repairs, updates, prevention year 1 - \$9,000

Month 13 of agreement will resume \$ 1,800

**NOTE 10 – EVALUATION OF SUBSEQUENT EVENTS**

The Organization has evaluated subsequent events through the date of the auditor's report.



HISTORIC BLUFFTON FOUNDATION  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2020 AND 2019

NOTE 11 – SUBSEQUENT EVENTS

South Carolina Cares Minority and Small Business/Nonprofit Relief Program – On December 29, 2020, the organization was notified that it has been selected to receive a grant in the amount of \$ 49,788. Funds have not yet been received.

**Balance Sheet****As of June 30, 2019**Jun 30, 19**ASSETS****Current Assets****Checking/Savings**

Coastal States # 6767 Operating 974.50

Coastal States #7294- Archives 7,194.52

Petty Cash 125.00

**Total Checking/Savings** 8,294.02**Other Current Assets**

Inventory 12,500.00

Utility Deposits 300.00

**Total Other Current Assets** 12,800.00**Total Current Assets** 21,094.02**Fixed Assets**

Deposits on Fixed Assets 5,387.00

Furniture, Fixtures &amp; Equipment 25,853.09

Property - Heyward House 425,165.28

Computer Equipment 502.43

**Total Fixed Assets** 456,907.80**Other Assets**

Restricted Assets 0.00

Restricted Asset - Teel House 338,889.40

**Total Other Assets** 338,889.40**TOTAL ASSETS** 816,891.22**LIABILITIES & EQUITY****Liabilities****Current Liabilities****Other Current Liabilities**

Direct Deposit Liabilities -4,215.29

Note Payable - Line of Credit 38,209.51

Payroll Liabilities 2,324.52

**Total Other Current Liabilities** 36,318.74**Total Current Liabilities** 36,318.74**Long Term Liabilities**

N/P South Atlantic Bank 9,977.20

**Total Long Term Liabilities** 9,977.20**Total Liabilities** 46,295.94**Equity**

Net Assets 776,765.44

Retained Earnings 27,493.97

Temporarily Restricted Equity 0.00

Net Income -33,664.13

**Total Equity** 770,595.28**TOTAL LIABILITIES & EQUITY** 816,891.22

Bluffton Historical Preservation Society - Welcome Center  
YTD Financial Report for the Month Ending  
30-Jun-20

	YTD Actual	Current Budget	Actual/ Budget Difference	Actual %
<b>Revenues</b>				
Grants				
Private Foundations	5,528		5,528	
Town of Bluffton ATAX	135,496	190,000	(54,504)	71.3%
Beaufort County ATAX	13,400	7,500	5,900	178.7%
Total Grant Income	<u>\$ 154,424</u>	<u>\$ 197,500</u>	<u>\$ (43,076)</u>	<u>78.19%</u>
Sales and Service Revenues				
Tours/Programs	9,463	19,440	(9,977)	48.68%
Total Sales & Service	<u>\$ 9,463</u>	<u>\$ 19,440</u>	<u>\$ (9,977)</u>	<u>48.68%</u>
Other Revenues				
Donations	6,916	1,100	5,816	628.73%
Total Miscellaneous	<u>\$ 6,916</u>	<u>\$ 1,100</u>	<u>\$ 5,816</u>	<u>628.73%</u>
<b>Total Revenues</b>	<u><u>\$ 170,803</u></u>	<u><u>\$ 218,040</u></u>	<u><u>\$ (47,237)</u></u>	<u><u>78.34%</u></u>
<b>Expenditures and Other Uses</b>				
Salaries & Benefits	\$ 92,931	\$ 121,500	\$ (28,569)	76.49%
Mortgage	5,763	7,290	(1,527)	79.05%
Interest Expenses	1,424	810	614	175.80%
Bank Fees	704	1,296	(592)	54.32%
Insurance	7,067	10,530	(3,463)	67.11%
Utilities	7,880	16,200	(8,320)	48.64%
Programs	2,008	3,500	(1,492)	57.37%
Advertising and Marketing	4,029	25,000	(20,971)	16.12%
Shipping/Postage	81	972	(891)	8.33%
Office Supplies	1,072	1,620	(548)	66.17%
Equipment Upgrades	1,129	3,645	(2,516)	30.97%
Contract Services				
Accounting	6,466	10,530	(4,064)	61.41%
Cleaning Services	787	1,620	(833)	48.58%
Landscaping	1,510	2,430	(920)	62.14%
Pest Control		972	(972)	0.00%
Repairs/Maintenance	480	8,100	(7,620)	5.93%
Website	1,651	2,025	(374)	81.53%
<b>Total Expenditures and Other Uses</b>	<u><u>\$ 134,982</u></u>	<u><u>\$ 218,040</u></u>	<u><u>\$ (83,058)</u></u>	<u><u>61.91%</u></u>



Bluffton Historical Preservation Society  
YTD Financial Report for the Month Ending  
30-Jun-20

	YTD Actual	Current Budget	Actual/ Budget Difference	Actual % Used
<b>Revenues</b>				
Grants				
Private Foundations	2,723	10,000	(7,277)	27.2%
Beaufort County ATAX	6,600	7,500	(900)	88.0%
Total Grant Income	<u>\$ 9,323</u>	<u>\$ 17,500</u>	<u>\$ (8,177)</u>	<u>53.27%</u>
Sales and Service Revenues				
Gift Shop	\$ 6,988	10,000	\$ (3,012)	69.88%
Memberships	\$ 1,919	3,000	\$ (1,081)	63.97%
Tours/Programs	4,661	4,560	101	102.21%
Special Events	33,868	17,500	16,368	193.53%
Total Sales & Service	<u>\$ 47,436</u>	<u>\$ 35,060</u>	<u>\$ 12,376</u>	<u>135.30%</u>
Other Revenues				
Colcock-Teel Endowment		10,000	(10,000)	0.00%
Archival Income (Caldwell Donation)		1,000	(1,000)	0.00%
Donations	3,406	10,900	(7,494)	31.25%
Rental Income	1,022	7,500	(6,478)	13.63%
Total Miscellaneous	<u>\$ 4,428</u>	<u>\$ 29,400</u>	<u>\$ (24,972)</u>	<u>15.06%</u>
<b>Total Revenues</b>	<u><u>\$ 61,187</u></u>	<u><u>\$ 81,960</u></u>	<u><u>\$ (20,773)</u></u>	<u><u>74.65%</u></u>
<b>Expenditures and Other Uses</b>				
Salaries & Benefits	\$ 45,772	\$ 28,500	17,272	160.60%
Mortgage	2,839	1,710	1,129	166.02%
Interest Expenses	702	1,190	(488)	58.99%
Archives		1,000	(1,000)	0.00%
Bank Fees	347	304	43	114.14%
Insurance	3,481	2,470	1,011	140.93%
Utilities	3,881	3,800	81	102.13%
Gift Shop Expenses	5,365	6,000	(635)	89.42%
Special Events	16,006	10,000	6,006	160.06%
Shipping/Postage	40	228	(188)	17.54%
Dues & Subscriptions	1,140	1,000	140	114.00%
Office Supplies	528	380	148	138.95%
Equipment Upgrades	556	855	(299)	65.03%
Professional Development	290	500	(210)	58.00%
Contract Services				
Accounting	3,185	2,470	715	128.95%
Cleaning Services	388	380	8	102.11%
Consulting Services		1,000	(1,000)	0.00%
Landscaping	744	570	174	130.53%
Pest Control		228	(228)	0.00%
Repairs/Maintenance	236	1,900	(1,664)	12.42%
Website	813	475	338	171.16%
Capital Improvements	3,190	17,000	(13,810)	18.76%
<b>Total Expenditures and Other Uses</b>	<u><u>\$ 89,503</u></u>	<u><u>\$ 81,960</u></u>	<u><u>\$ 7,543</u></u>	<u><u>109.20%</u></u>



**Historic Bluffton Foundation Board of Trustees Meeting  
February 2021 Meeting Minutes  
Meeting Date: February 16, 2021**

Attendees: Amanda Jackson-Denmark, Jen Summerville, Carol Pringle, Shirley Mingledorff, John Sulka, Donna Huffman  
Executive Director, Kelly Graham  
Director, Katie Epps

1. Called to order at 4:32pm - President Amanda Jackson
2. Adoption of agenda
  - \*Motion to accept agenda – Shirley Mingledorff
  - \*2<sup>nd</sup> Jen Summerville
3. Approval of November meeting minutes – Carol Pringle
  - \*Motion to accept minutes -Donna Huffman
  - \*2<sup>nd</sup> Shirley Mingledorff
4. Treasurer's report- John Sulka

Total Checking/Savings	\$147,005.90
Total current assets	\$163,901.90
Total fixed assets	\$625,994.81
Total Assets	\$1,128,786.11
Total current liabilities	\$25,369.76
Total Liabilities	\$118,269.76
Total Liabilities and Equity	\$1,128,786.11

\*Motion to accept financial report – Donna                      2<sup>nd</sup> Shirley

5. Heyward House and Garvey House report – Katie Epps
  - \*Overall visits increased in January.
  - \*Kelly designed a sign to place over Pavilion.
  - \*Friday 2/12/21 hosted Valentine event. It was nicely attended.
  - \*The Grounds has requested for 3 events.
  - \*Jen inspected ceiling tiles that needs repair.

- \*Roof on Summer kitchen needs replacing. Several shingles are missing.
- \*Slave cabin floors are damp due to rain.
- \*Boy scouts volunteer scraped cracking paint from outside of gift shop. Kelly has begun painting.

6. HBF Update- Kelly Graham

- \*Submitted 2021-2022 budget for review.

Motion to adopt 2021-2022 Budget- John                      2<sup>nd</sup> Donna

All in favor- 8 voted    Motion passed

Board approved the budget and project and committed to financial responsibility for carrying it out to the stage of completion, contemplated in the application, should funding be approved.

- \*Estimating 100 membership renewals.
- \*Membership event Friday April 16<sup>th</sup>, 6-8pm
- \*Common Ground events 2/7, 2/12, 3/7, 4/24
- \*30X30 Tent available through Amazing Rentals. Can rent for \$100 per/event
- \*Will not allow Oak Grove to be rented for parking.
- \*Distillery has paid \$5000. Board members should attend 27<sup>th</sup> or March 5<sup>th</sup> opening.

7. New Business/Old Business – Amanda Jackson-Denmark NONE

8. Adjourn – meeting adjourned at 5:08pm

Motion to adjourn by Donna Huffman                      2<sup>nd</sup> by Jen Summerville

Submitted by Carol Pringle



## Accommodations Tax Funding

### Final Report FY2019/2020

#### 1. PROJECT INFORMATION:

Organization Name: Bluffton Historical Preservation Society (BHPS)

Project Name: Welcome Center at the Heyward House

Contact Name: Katie Epps

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 detailed End-of-Year Directors' report is included in this package. A summary is below.

We had 10,632 people at the Heyward House Museum and Welcome Center this past fiscal year. Everyone that comes to the Heyward House receives the "Welcome Center Treatment" and is given a smile, maps, brochures, directions, or any other information needed. Of those visitors, 8,660 people came for information or a tour. Tourists (non-locals) accounted for 79.3 of those visitors. The remaining visitors were for events, rentals, business, or archives. Prior to closing in FY19/20 for 3.5 months for COVID-19, we projected to have a record number of visitors. Our busiest time of the year for tourists is March-May, so we took a significant hit on revenue and visitors during our busiest months. March numbers were almost 1/3 of the numbers from March 2019 and we had only 6% of the total 4<sup>th</sup> quarter visitors we had last year, with approximately 219 visitors. The 4<sup>th</sup> quarter is also when we have our lowest percent of locals and with travel restrictions and closures, non-local numbers were severely impacted. During our closure, visitors picked up brochures, merchant maps, and self-guided walking tour maps on our covered porch area. We estimate 2 people for each map taken. We were able to capture visitor data when we spoke with the visitors, with the majority of visitors in March-early May from Hilton Head and Bluffton and non-locals were the majority of visitors from mid-May through June.

The Garvin-Garvey house had 1,226 visitors, of which 67% were tourists. Visitor numbers were significantly impacted by the closure for COVID-19 as springtime is generally the busiest time of the year. Please see our Heyward House and Garvin-Garvey House visitor statistics for FY19/20.

During our closure, we were able to establish cleaning protocols, reopening procedures, rework exhibits, conduct maintenance and repairs on the property, and update guided tours for the Garvin-Garvey house. Despite being closed, we used our time to enhance the visitor experience!

Since we are often the first stop for visitors, we strive to make the Heyward House Property as welcoming and aesthetically pleasing as possible, while maintaining the historic integrity of the 179-year old structure. Our goal is to ensure everyone who visits can easily view and access the house and amenities. Extensive landscaping was completed on the property, including removing invasive plants, trimming azaleas throughout the property, and removal of weeds and vines. This work improves the visibility of the house, the Boundary/Green Street intersection, and the Bridge/Boundary Street intersection.

Common Ground opened in February 2019. We rented the property out for 3 weddings, 3 non-BHPS events, and we held 3 events during the Fall. The ability to host events and rent our property is the driving revenue source for our sustainability. The completion of the parking lot at Martin Family Park drove visitors to our back doors, where we saw most of our traffic flow into the house. Common Ground has become a staging area for visitors to regroup prior to exploring the town or to enjoy a rocking chair or picnic lunch.

We hand delivered rack cards to hotels throughout Beaufort County and the Savannah/Hilton Head airport. Rack cards are also shipped to all the South Carolina Welcome Centers and to any other attractions that request them. In our welcome center, we increased our variety of brochures in our brochures stands and improved the layout to increase visibility to visitors. We routinely receive verbal accolades from visitors about how our brochure rack has an expansive selection of diverse attractions throughout the Lowcountry and the visitor can easily select attractions for each region they plan to visit. Visitors enjoy the personalized attention they receive when they come to the Heyward House. Some visitors fall in love with the Lowcountry and want to retire or move here, so if they come to the Heyward House, we provide them with a relocation guide that we created with a local real estate agent. The packet includes lists of neighborhoods with

price range, real estate agents, medical centers, hospitals, schools, utilities, and social media links. We sometimes receive phone calls from visitors coming to the area and we mail out packages that include maps, brochures, rack cards, and many special requests for other information. As the welcome center, our focus is the fulfillment aspect of assisting visitors, so most of our inquiries about Bluffton are after they are already in town.

We held three BHPS fundraising events on Common Ground this year: the Boiled Peanut Festival, Historic Cocktail Party, and our Annual Oyster Roast. Each of these events raised over \$5000 for BHPS. We were recipients in three additional fundraising events, Calhoun Street Soiree, Belk Charity Day and Spartina 449 event. We also held our annual meeting on Common Ground and raised funds for A Call to Action. We rented Common Ground out for two weddings/rehearsals and had 3 more scheduled that were canceled due to COVID-19. We rented the space to two other non-profits for fundraising/membership events and another rental for a private event.

We made numerous appearances throughout the year to promote the Heyward House, Garvin-Garvey House, events, archives, and the archaeology excavation at Wright Family Park, to news outlets, including WJCL, Bluffton Today, WTOG, Bluffton Sun, WHHI, and to the Town of Bluffton Social Media coordinator. Our social media presence has increased tremendously, with a growth of 22.9% for the Heyward House Facebook page. Please see our Social Media Report for FY2019/2020.

#### 4. PROJECT ATTENDANCE:

	FY2018/2019	FY2019/2020
Total budget of Project of Event	\$171,250	\$218,040
Amount of Bluffton ATAX received	\$182,755-Includes \$17, 624 Chimney flashing repair work and \$45,000	\$135,496



	for Capital improvements.	
Amount funded by other sources	\$25,424	\$35,307
Total attendance to Heyward House	12,968	10,632
Information and Tours	11,652	8,660
Total tourists	9,526	6,860

#### 5. METHODS:

Visitor information is collected in a Guest Book near the front door at the Heyward House. In the guest book, we collect their name, city, state, where they are staying (hotel, timeshare, rental, residence, or other), how they heard about us (word of mouth, internet, signs, or other) and if they are taking a tour. Due to COVID-19, we changed protocol and staff verbally gathered the information to limit touch points. Please see the Visitor Statistics report for FY2019/2020.

#### 6. PROJECT BUDGET:

Please see the Welcome Center's end of year financial report for FY2019/2020. An independent audit will be conducted this fall and a copy will be given to the Finance Department.

#### 7. ORGANIZATION SIGNATURE:

Name: Katie Epps

Title: Heyward House Museum and Welcome Center Director

Signature:

Katie Epps

Date: July 31, 2020

## NOTES

	Called Off	No Show	None Scheduled
Staff			
Docent Am			
Docent Pm			

[illegible]

F Visitor Stats	Before 10am	10:00am	10:30am	11:00am	11:30am	12:00pm	12:30pm	1:00pm	1:30pm	2:00pm	2:30pm	3:00pm	3:30pm	4:00pm	4:30pm	TOTALS
Women Tours																
Men Tours																
Student Tours																
Children under 10																
Information																
Events																
Rental																
Groups																
Business/Archives																
															Total Visitors	

[illegible]



Bluffton Historical Preservation Society  
 Approved Operational Budget  
 Fiscal Year 2018-2019

Approved 2018-2019 Budget				
	Welcome			
	Total	Center	BHPS	Capital
	Budget	Only	Only	Project
Revenues				
Grants				
Private Foundations	10,000		10,000	
Town of Bluffton ATAX	185,000	142,000		43,000
Beaufort County ATAX	15,000	7,500	7,500	
Total Grant Income	210,000	149,500	17,500	43,000
Sales and Service Revenues				
Gift Shop	7,500		7,500	
Memberships	12,000		12,000	
Tours/Programs	24,000	18,000	6,000	
Special Events	20,000		20,000	
Total Sales & Service	63,500	18,000	45,500	0
Other Revenues				
Colcock-Teel Endowment	10,000		10,000	
Archival Income (Caldwell Donation)	2,000		2,000	
Donations	5,000	3,750	1,250	
Rental Income	1,000		1,000	
Total Miscellaneous	18,000	3,750	14,250	0
<b>Total Revenues</b>	<b>291,500</b>	<b>171,250</b>	<b>77,250</b>	<b>43,000</b>
Expenditures and Other Uses				
Salaries & Benefits	140,000	102,000	38,000	
Mortgage	9,000	6,750	2,250	
Interest Expenses	2,000	1,500	500	
Archives	1,000		1,000	
Bank Fees	1,600	1,200	400	
Insurance	12,000	9,000	3,000	
Utilities	20,000	15,000	5,000	
Gift Shop Expenses	4,000		4,000	
Special Events	10,000		10,000	
Programs	3,500	2,625	875	
Advertising and Marketing	10,000	7,900	2,100	
Shipping/Postage	1,200	900	300	
Dues & Subscriptions	1,000		1,000	
Office Supplies	2,000	1,500	500	
Equipment Upgrades	2,000	1,500	500	
Professional Development	700	0	700	
Contract Services				
Accounting	12,000	9,000	3,000	
Cleaning Services	2,500	1,875	625	
Consulting Services				
Landscaping	4,500	3,375	1,125	
Pest Control	1,200	900	300	
Repairs/Maintenance	5,800	4,350	1,450	
Website	2,500	1,875	625	
Capital Improvements	43,000			43,000
<b>Total Expenditures and Other Uses</b>	<b>291,500</b>	<b>171,250</b>	<b>77,250</b>	<b>43,000</b>
<b>Revenues Over/(Under) Expenditures</b>	-	-	-	-

Bluffton Historical Preservation Society  
Approved Operational Budget  
Fiscal Year 2019-2020

Approved 2019-2020 Budget			
	Welcome		
	Total	Center	BHPS
	Budget	Only	Only
	Budget	Budget	Budget
<b>Revenues</b>			
Grants			
Private Foundations	10,000		10,000
Town of Bluffton ATAX	190,000	190,000	
Beaufort County ATAX	15,000	7,500	7,500
Total Grant Income	215,000	197,500	17,500
Sales and Service Revenues			
Gift Shop	10,000		10,000
Memberships	3,000		3,000
Tours/Programs	24,000	19,440	4,560
Special Events	17,500		17,500
Total Sales & Service	54,500	19,440	35,060
Other Revenues			
Colcock-Teel Endowment	10,000		10,000
Archival Income (Caldwell Donation)	1,000		1,000
Donations	12,000	1,100	10,900
Rental Income	7,500		7,500
Total Miscellaneous	30,500	1,100	29,400
<b>Total Revenues</b>	<b>300,000</b>	<b>218,040</b>	<b>81,960</b>
<b>Expenditures and Other Uses</b>			
Salaries & Benefits	150,000	121,500	28,500
Mortgage	9,000	7,290	1,710
Interest Expenses	2,000	810	1,190
Archives	1,000		1,000
Bank Fees	1,600	1,296	304
Insurance	13,000	10,530	2,470
Utilities	20,000	16,200	3,800
Gift Shop Expenses	6,000		6,000
Special Events	10,000		10,000
Programs	3,500	3,500	
Advertising and Marketing	25,000	25,000	
Shipping/Postage	1,200	972	228
Dues & Subscriptions	1,000		1,000
Office Supplies	2,000	1,620	380
Equipment Upgrades	4,500	3,645	855
Professional Development	500		500
Contract Services			
Accounting	13,000	10,530	2,470
Cleaning Services	2,000	1,620	380
Consulting Services	1,000		1,000
Landscaping	3,000	2,430	570
Pest Control	1,200	972	228
Repairs/Maintenance	10,000	8,100	1,900
Website	2,500	2,025	475
Capital Improvements	17,000		17,000
<b>Total Expenditures and Other Uses</b>	<b>300,000</b>	<b>218,040</b>	<b>81,960</b>

Revenues Over/(Under) Expenditures

- - -

Bluffton Historical Preservation Society  
Approved Operational Budget  
Fiscal Year 2020-2021

Approved 2020-2021 Budget			
Welcome			
	Total	Center	BHPS
	Budget	Only	Only
	Budget	Budget	Budget
<b>Revenues</b>			
Grants			
Private Foundations	8,000		8,000
Town of Bluffton ATAX	190,000	190,000	
Beaufort County ATAX	10,000	5,000	5,000
Total Grant Income	208,000	195,000	13,000
Sales and Service Revenues			
Gift Shop	8,000	4,000	4,000
Memberships	1,200		1,200
Tours/Programs	18,000	15,000	3,000
Special Events	7,000	3,000	4,000
Total Sales & Service	34,200	22,000	12,200
Other Revenues			
Colcock-Teel Endowment	5,000		5,000
Archival Income	1,800		1,800
Donations	8,000	4,000	4,000
Rental Income	10,000	4,000	6,000
Total Miscellaneous	24,800	8,000	16,800
<b>Total Revenues</b>	<b>267,000</b>	<b>225,000</b>	<b>42,000</b>
<b>Expenditures and Other Uses</b>			
Salaries & Benefits	150,000	130,000	20,000
Mortgage	4,000	3,500	500
Interest Expenses	2,500	1,500	1,000
Archives	1,000		1,000
Bank Fees	1,600	1,400	200
Insurance	13,000	11,000	2,000
Utilities	17,500	17,000	500
Gift Shop Expenses	6,000	4,000	2,000
Special Events	1,200	400	800
Programs	2,000	2,000	
Advertising and Marketing	5,000	4,500	500
Shipping/Postage	1,200	1,000	200
Dues & Subscriptions	1,000	500	500
Office Supplies	2,000	1,750	250
Equipment Upgrades	4,500	4,000	500
Professional Development	1,000	200	800
Contract Services			
Accounting	13,500	12,000	1,500
Cleaning Services	1,800	1,600	200
Consulting Services	500		500
Landscaping	4,000	3,500	500
Pest Control	900	750	150
Repairs/Maintenance	10,000	9,000	1,000
Security	300	150	150
Website	2,500	2,250	250
Capital Improvements	20,000	13,000	7,000
<b>Total Expenditures and Other Uses</b>	<b>267,000</b>	<b>225,000</b>	<b>42,000</b>
<b>Revenues Over/(Under) Expenditures</b>	<b>-</b>	<b>-</b>	<b>-</b>



## Annual Comparison of Revenue of the Bluffton Historical Preservation Society

	2007	2008	2009	2010	2011	2012	2013/ 2014	2014/ 2015	2015/ 2016**	2016/ 2017	2017/ 2018	2018/ 2019***	2019/ 2020
Revenue	174,425	224,105	161,697	269,103	194,758	234,452	199,823	180,554	293,172	182,409	194,074	280,415	231,990
Bluffton ATAX	90,494	141,057	74,805	93,210	108,950	135,075	108,243	103,456	118,451	98,022	114,493	215,201	135,496
Expenses	185,980	193,451	172,096	243,181	179,980	243,233	194,402	184,530	173,989	174,471	204,557	269,384	224,485
Profit/Loss	-11,555	30,654	-10,399	25,922	14,778	-8,781	5,421	-3,976	119,183	7,937	-10,483	11,031	7,505
# of Visitors	9,256	8,619	6,198	5,016	5,645	6,630	10,636	11,539	11,215	10,374	12,524	12,968	10,632
# of Staff	3	2	2	2	3	3	3	3	3	3	3.5	3.5	3.5

\* Revenue and Expenses for Capital Projects are included in 2008, 2009, 2010, 2012, 2013/2014, and 2018/2019

\*\*Revenue included \$100,000 South Carolina Archives and History Grant which was used in 2016/2017 and 2017/2018 to make upgrades and repairs to the Heyward House Museum and Welcome Center

\*\*\* Bluffton ATAX includes a separate grant for a water intrusion and chimney flashing repair project

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.

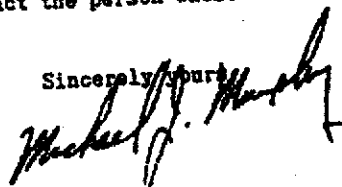
Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section \*. Your exempt status under section 501(c)(3) of the code is still in effect.

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)

# ACCOMMODATIONS TAX ADVISORY COMMITTEE

## STAFF REPORT

### Department of Finance & Administration



MEETING DATE: May 18, 2021  
 SUBJECT: Historic Bluffton Foundation (HBF): Welcome Center  
 at the Heyward House  
 PROJECT MANAGER: Natalie Majorkiewicz, CGFO, Treasury Manager

Summarized below is the application from Historic Bluffton Foundation (HBF) for Accommodations Tax grant dollars in support of advertising and promotion of tourism, arts and cultural events, and operating a visitors center.

#### Requested Amount: \$169,000

Welcome Center at the Heyward House	Total Budget	Recommended ATAX Grant (approx. 82% of project budget)
Advertising and Promotion of Tourism:	\$ 4,000	\$ 4,000
Arts & Cultural Events:	3,000	3,000
Operating Visitor Information Center:	200,250	162,000
<b>Total</b>	<b>\$ 207,250</b>	<b>\$ 169,000</b>

Eligible "Tourism-Related Expenditures" per South Carolina Code of Laws include, *"advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity, promotion of the arts and cultural events, construction, maintenance, and operation of facilities for civic and cultural activities,"* and *"operating visitor information centers."*

#### Advertising and Promotion of Tourism:

- Total budget is \$4,000.
- Marketing Plan is provided on page 13 of application.
- Includes website maintenance, social media advertising, and print media.

#### Arts & Cultural Events:

- Total budget is \$3,000.
- Heyward House, Garvin-Garvey House, and walking tours continue to be offered and adjustments have been made due to COVID-19 to ensure social distancing is maintained while being able to see and learn about the history of Bluffton. Additionally, the Bluffton History Class for Tour Guides continues to be offered and test participants to receive a certificate of achievement.

#### Operating Visitor Information Center:

- Total remaining budget is \$200,250 with remaining amount requested at \$162,000.
- Expenses qualify due to the primary purpose of the Heyward House is to provide information, brochures, and other services to tourists.
- Operating Expenses of \$190,250 include personnel, mortgage and utilities, and contract services for Heyward House.
- Capital Improvements of \$10,000 include:
  - Shutters and dormers \$9,000
  - Exterior rotten soffits repairs \$7,000
  - Tree and limb removal and mitigation \$4,000
  - Windows and surround repair and replacement \$3,000

Festival/Event: The Heyward House serves as Town of Bluffton's Welcome (Visitors) Center.

Bluffton Event: The house and special events are located and held in Old Town with presentations and history talks given throughout the community.



Tourism Draw %: Visitors to the Hayward House was 10,632 in 2019/2020 with 82% from out of town. Total visitors projected for FY 2020/2021 is estimated at 10,000 with visitor numbers slowly rebounding due to the pandemic.

Benefit to Tourism: Official Welcome (Visitors) Center for the Town of Bluffton.

Self-Sufficiency % (Financial Need): Requesting approximately 82% of Welcome Center budget, and 65% of the total organization's budget. Last year's annual award was \$190,000.

**Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)**

Amount Recommended	Advertising (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Misc. (10)	Total of 40 possible	Comments
\$169,000	N/A	N/A	N/A	N/A	N/A	N/A	Electronic Meeting

**Previous Funding Amounts to Organization - Bluffton Historical Preservation Society (BHPS)**

Fiscal Year	Amount Requested	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
2021	190,000	84%	\$190,000	\$190,000	68,062	
2020	190,000	84%	190,000	190,000	149,450	
2019	17,263	100%	17,263	17,263	17,263	Chimney Repair
2019	177,000	81%	185,000	185,000	172,224	Heyward House
2018	127,000	75%	127,000	127,000	114,494	"

**Accommodations Tax Committee Recommendations and Comments:**

---

The Committee recommends funding \$169,000 for advertising and promotion of tourism (\$4,000), arts and cultural events (\$3,000), and operating a visitors information center (\$162,000).

Title Page:

To: Accommodation Tax Advisory Committee

From: Society of Bluffton Artists

Application Deadline: March 2021

Name of Project: Promoting the Arts in the Lowcountry and Beyond

Sponsors Name: Society of Bluffton Artists

Sponsors Street Address: 6 Church St Bluffton, SC 29910

Sponsors Mailing Address: PO Box 1972 Bluffton, SC 29910

Contact Information:

Mary Ann Burgeson, President

3 Rose Hill Drive

Bluffton, SC 29910

Cell: 843 816 3776

John Kenney, Treasurer

18 Ladyslipper Island Ct.

Bluffton, SC 29910

Cell: 434 960 3622

Funds Requested: \$ \$20,000

**Carge, Kristy**

---

**From:** Mary Ann Burgeson <maryfirestar04@gmail.com>  
**Sent:** Wednesday, May 5, 2021 11:47 AM  
**To:** Carge, Kristy  
**Subject:** Re: Town of Bluffton - ATAC Request

WARNING!

This email originated from outside of the Town of Bluffton's email system. DO NOT click any links or open any attachments unless you recognize the sender and know the content is safe.

Hi Kristy,

Thank you for help clarifying this. Once more we have an embarrassing error, yikes! This is the result of last minute re-reading of the guidelines and deciding that our HVAC would come under "maintenance of tourist related buildings". I hope that was an accurate reading of the guidelines of eligible projects. All figures should read: Project costs &40,500, request 20,000. Not one half, I know but a nice round figure to request support for during our recovery year. My file of the submission is a PDF that I can't edit from John so if you would please change that figure on the first page to reflect that I would appreciate it.

Thank you so much. I hear the building is open again so I hope that makes your job easier. :)

Marie Burgeson

On May 5, 2021, at 9:26 AM, Carge, Kristy <kcarge@townofbluffton.com> wrote:

<ATAX Funds request.pdf>



Addendum to:

## 1. General Description

The Society of Bluffton Artists has been active in this town since 1994, way before all the other galleries in Old Town arrived. Our membership has surprisingly remained the same even during this difficult year averaging about 130 members and supporters. This has been a very difficult year for SoBA as it has for all businesses in town. We had to close down, of course, for a few months and when we reopened it was on a very limited basis. Tourists are our biggest source of income at the gallery and with out travel for months our artists suffered income losses and the gallery barely survived. We had a loyal and fearless number who were willing to come to staff the gallery, masked up and sanitizing several times a shift. We were able to only be open a couple of days a week for months. We resumed advertising both locally and in the southeast and finally for these last three months it seems the tourists are coming back.

Ordinarily, and soon again we hope, we work with organizers with all local events like the Paint Out, and all local art Festivals including the Mayfest, and Bluffton Arts and Seafood. We publicize the events on all platforms of social media and in our Newsletter that goes to hundreds of followers. We plan our participation and have painters on the porch and tents on the lawn. We were again voted Best Gallery in Old Town Bluffton by local magazines. Last year we had ads in a regional publication that goes in the airports and other tourist centers here and in Savannah. Our guest art instructors come from all over the country but sadly none could come for the whole year. When they do come they bring students/tourists with them to experience our beautiful area. This year will be better and our classes and workshops will be back this summer.

We are discovering people find us more and more on social media. We have an old website that can no longer be supported by updates

and plug ins and have put off constructing a new more efficient and easier to use website for years for lack of funds. That is part of our plan for the coming year to upgrade our image and desirability as a destination visit. Our website and social media platforms attract thousands of hits and if we look more appealing and tell a better story, those tourist hits will become visits. We are counting on a rebound from all that pent up desire to travel and buy beautiful things.

Ordinarily we help in the schools and teach classes in the Boys' and Girls' Club but this year that was not allowed. We have continued with very small children's classes as well as local artist's instruction for adults in our Center for Creative Arts.

We had to cancel our Annual Judged Show which draws artists from all around the southeast to participate, when our out of town judge cancelled. That show has been a major fundraiser for us in the past. We also had to cancel our annual big gala with dinner, entertainment and dancing, also another big source of funds that we depend on.

We were able to award our \$2000.00 Naomi McCracken Scholarship to a Bluffton senior art student this year for her outstanding work.

We are excited about our plans for recovery. We plan to have a new website created by a local professional and the plans for it are very exciting. We can share local festivals and happenings on our site and highlight local businesses like the Bluffton Inn and other businesses where we have display art. The cost of the website is included in our request for Atax funds this year. We also have to replace our failed HVAC which certainly makes the gallery a pleasant place to be on a summer day in Bluffton. We will have a full time PR person on the board next year whose job will be to spread our news and the beauty of Bluffton ever wider on all social platforms. We have thousands of followers.

In short, we intend to continue to do all we can to spread the word about this lovely little slice of paradise where we live. Thank you for your consideration.

The Society of Bluffton Artists is the only 501© 3 all-volunteer arts organization and gallery in Bluffton, SC. The mission of SoBA is to promote a public interest in and an appreciation of visual art in the community. SoBA assist artists at all levels of development to enhance their artistic abilities in the visual arts.

The Society of Bluffton Artists founded in 1994 by seven Bluffton area artists now has 124 members. Of the total 111 display art in the gallery. The majority of SoBA artists have relocated to the area from all over this country and they have family and guests who visit and enjoy Bluffton.

SoBA invites all artists over the age of 18 to become display or supporting members.

### Excerpt of the minutes of the March 15, 2021 Official Board Meeting of the Society of Bluffton Artists:

Board Members Present: Burgeson, Ford, Kenney, VanNus, Rhodes, Sanders, Pecce, Gregar

A motion was made to approve an application for the ATax Grant. (and to commit funding to complete the project) It was seconded and approved.

Respectfully submitted, Mary Ann Ford, Secretary “

Our Atax grant, if we are approved, will go to the creation of a new website that has room to highlight local events in Bluffton and partner organizations as well as our own events calendar and to promote growth in the arts and all cultural events in our community. We want to grow our brand and help make Bluffton a destination of the highest quality and desirability. We will also use the funds to continue our high quality local and area advertising to bring patrons, students and tourists to the gallery and community. And we request help in maintaining our facility where we welcome said tourists by replacing our unrepairable HVAC unit so they can browse in comfort! The matching funds for our request will come from membership dues, art sales and a South Carolina Cares grant from last year.





May 29, 2021

To whom it may concern,

Bragg Media Marketing has been The Society of Bluffton Artists' agency of record since 2017. Our services have included public relations, graphic design and website maintenance. The website is the cornerstone for modern-day sales, marketing and customer service. The website also is how they attract more customers and how they process payments for classes, events and memberships. Unfortunately, the SOBA website infrastructure is very outdated with features that are no longer supported by software developers.

SOBA's programs and offerings attract locals, part-timers, vacationers and even children. Much like SOBA's ongoing marketing, public and media relations, their new website takes different audience types into account. We have worked closely with SOBA's board of directors to construct a website plan that modernizes their e-commerce, updates the aesthetics, reorganizes information so it's easier for everyone to navigate and also automatically conforms to mobile devices. Attached to this letter, please find the scope of work and fee schedule involved with SOBA's new website.

As a Bluffton SC-based marketing agency, we see how involved SOBA is in the community — from outreach programs to after school activities and from classes/workshops to a network of artists. That's why we offered a price reduction to the making of the new website. We see all of the good they do in Bluffton and we want to see SOBA succeed in the fastest-growing town in the United States.

Sincerely,

A handwritten signature in black ink that reads "Heather Bragg". The script is fluid and cursive.

Heather Bragg, president

Addendum

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E2) Scope of work to be completed-SOBA  
E3) Web site proposal  
E4) Line item budget sept 1, 2020-aug 31, 2021  
E5) FYTD  
E6) profit/loss Accounting statement 2019-2020

G1a) A tax spending sept 2019-aug 2020  
G2a) SOBA Budget sept 1,2019-aug 31, 2020  
G2b) Overview budget sept 2020-aug-2021  
G 3a) A Tax Funding 2018-2019

H1a) Irs tax exempt status  
H1b) SC tax exempt status  
H2) SOBA sample advertising  
H3) Soba Webpage cover  
H4) Soba Instagram cover  
H5) SOBA Facebook cover

## E Financial Request

Cost of project \$40,000

Duration 12 months April 2021 through March 2022

## Income

A Tax grant Town of Bluffton ( 50%)	\$20000
Society of Bluffton Artists ( 50%)	\$20000
	\$40000

Sources of revenue: Art Sales, Membership Dues, Sponsors, Fundraisers, Holiday Boutique, South Carolina Cares Grant, income from classes and workshops

## Expenses

Regional Marketing ie weekly ads in regional publications	\$6000
---	--------

Island Packet, Bluffton Packet  
The Bluffton Sun  
Area Map ADV.

## Professional Services

Bragg Media	\$19000
Ad Creation and Placement, Content Management, Web site Management, Eclectic Newsletter, Featured Artists & Gallery Promotion Material. Social Media Content & Advertising and creation and building of a new web site serving a broader community	\$7500

In-house Promotional	\$400
Print promotional material for Art Classes and events	\$ 600
Replace HVAC system	\$ 7000
Total	\$40500



## E. Financial Request

Cost of project: \$36,400.00

Duration: 12 months from April 2021 through March 2020

## Income:

A tax grant from Town on Bluffton (50%)	\$18,200.00
Society of Bluffton Artists (50%)	<u>\$18,200.00</u>
	\$36,400.00

## Sources of Revenue:

Art Sales, Membership Dues, Sponsors, Fundraisers, Holiday Boutique,  
South Carolina Cares Grant, Income from Classes and Workshops

## Expenses:

Regional Marketing, i.e. weekly ads in regional publications	\$7,000.00
Island Packet, Bluffton Packet	
The Bluffton Sun	
Area Map ADV.	

## Professional Services:

Bragg Media:	Ad Creation and Placement, Content Management, Website Management, Eclectic Newsletter, Featured Artist & Gallery Promotion Material	\$20,400.00
	Social Media Content & Advertising and creation and building of a new website serving a broader community	\$7,500.00
In-house Promotional		\$900.00
Print promotional material for Art Classes and Events		\$600.00
Total Advertising Costs		\$36,400.00



## Scope of Work: Website Design

February 11, 2021

### Prepared by:

Heather Bragg  
Bragg Media Marketing Agency  
Bluffton, SC 29910  
[heather@braggmedia.com](mailto:heather@braggmedia.com)  
[braggmedia.com](http://braggmedia.com)  
843-415-3490

### Prepared for:

Marie Burgeson  
Kim France  
Sheila Johnson  
The Society of Bluffton Artists  
[kimfrancehhi@gmail.com](mailto:kimfrancehhi@gmail.com)  
[maryfirestar04@gmail.com](mailto:maryfirestar04@gmail.com)  
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## Project Overview:

**Bragg Media Marketing Agency** plans for a complete website design to include the following services:

- Initial Planning Meeting
- Complete Website Redesign on WordPress platform
- SEO, Security and Optimization plugins
- E-Commerce and Registration
- User Manual and Training

## Project Details:

<b>Project Name:</b>	The Society of Bluffton Artists Website
<b>Project Description:</b>	Complete website redesign of sobagallery.com to include more modern design and easy-to-use payment and class registrations.
<b>Project Period:</b>	February 11 - April 20
<b>Primary Agency Contact:</b>	Heather Bragg 843-415-3490 heather@braggmedia.com
<b>Secondary Agency Contact:</b>	Mike Bragg mike@braggmedia.com
<b>Primary Client Contact:</b>	Marie Burgeson The Society of Bluffton Artists <a href="mailto:maryfirestar04@gmail.com">maryfirestar04@gmail.com</a>

## High-Level Objective:

1. **Modern Website Design:** Responsive layout that automatically transforms for all mobile devices; eye-catching visuals; on WordPress platform with visual builders that allow you to grow with your organization's needs
2. **More Exposure:** Search Engine Optimization plugins; intuitive design that encourages people to purchase
3. **Lead Optimization:** Online forms that automatically e-mail key people in company
4. **Security:** Standard SSL certificate, data privacy best practices and full-bodied security plugins



## Tasks, Milestones & Timelines:

Brief Description of Services	Start Date	Due Date	Fee Due
<b>Milestone 1</b> Planning Session	Upon agreement signature		\$3,750
<b>Milestone 2:</b> Website Planning	2/11/2021	2/24/2021	
Planning Document	2/11/2021	2/15/2021	
Sitemap	2/15/2021	2/19/2021	
Wireframe	2/19/2021	2/24/2021	
<b>Milestone 3:</b> Website Build	2/25/2021	3/10/2021	
Set up development site	2/25/2021	3/1/2021	
Build two landing pages	3/1/2021	3/10/2021	
<b>Milestone 4:</b> Mid-Project Approval	3/10/2021	3/12/2021	\$1,875
Approve initial design	3/10/2021	3/12/2021	
<b>Milestone 5:</b> Finish Website Build	3/15/2021	4/2/2021	
Build out rest of website	3/10/2021	3/26/2021	
Test website	3/29/2021	4/2/2021	
<b>Milestone 6:</b> Final Project Approval	4/5/2021	4/5/2021	\$1,875
<b>Milestone 7:</b> Launch	4/5/2021	4/14/2021	
Configure DNS and hosting	4/5/2021	4/8/2021	
SSL Certificate and fixing any errors	4/8/2021	4/14/2021	
<b>Milestone 8:</b> Post-Launch	4/15/2021	4/20/2021	
Website Manual with passcodes, etc.	4/15/2021	4/17/2021	
Training Tutorials/Videos	4/17/2021	4/20/2021	

## Reporting:

Client communication occurs regularly throughout the project through e-mails and the secure Bragg Media client portal.

## Fees & Expenses:

- The total cost of the website design is \$7,500.
- The initial deposit, half of the estimated fees of \$3,750, is due upon signing of the project agreement.
- A payment of \$1,875 is required upon approval of first creative.
- The final payment of \$1,875 is required prior to launch.
- An optional web hosting and maintenance fee of \$100 is due monthly with automatic payments set up using the client portal.



May 29, 2021

To whom it may concern,

Bragg Media Marketing has been The Society of Bluffton Artists' agency of record since 2017. Our services have included public relations, graphic design and website maintenance. The website is the cornerstone for modern-day sales, marketing and customer service. The website also is how they attract more customers and how they process payments for classes, events and memberships. Unfortunately, the SOBA website infrastructure is very outdated with features that are no longer supported by software developers.

SOBA's programs and offerings attract locals, part-timers, vacationers and even children. Much like SOBA's ongoing marketing, public and media relations, their new website takes different audience types into account. We have worked closely with SOBA's board of directors to construct a website plan that modernizes their e-commerce, updates the aesthetics, reorganizes information so it's easier for everyone to navigate and also automatically conforms to mobile devices. Attached to this letter, please find the scope of work and fee schedule involved with SOBA's new website.

As a Bluffton SC-based marketing agency, we see how involved SOBA is in the community — from outreach programs to after school activities and from classes/workshops to a network of artists. That's why we offered a price reduction to the making of the new website. We see all of the good they do in Bluffton and we want to see SOBA succeed in the fastest-growing town in the United States.

Sincerely,

A handwritten signature in black ink that reads "Heather Bragg". The signature is written in a cursive, flowing style.

Heather Bragg, president



## Society of Bluffton Artists

## Proposed Budget

For the Period From Sep 1, 2020 to Aug 31, 2021

Filter Criteria includes: 1) Types: Income Statement Accounts; 2) Active Accounts. Report is printed with Accounts having Zero Amounts. Budget D.

Account ID	Account Description	Account Type	Budget 2020/21	Actual 2019/2020 fiscal yr
40000	Art Sales	Income	55,000.00	47,100.00
40200	CCA Income	Income	34,000.00	34,000.00
40300	Holiday Boutique	Income	3,000.00	3,682.50
40400	Membership Dues 2020/21	Income	13,000.00	14,000.00
40500	Other Income (Show)	Income	4,000.00	4,800.00
40650	Fund Raisers	Income	7,000.00	170.00
40700	Other Income Scholarship Fund	Income	2,000.00	2,425.00
45300	Bluffton A-Tax	Income	14,100.00	15,300.00
60000	Artist Commissions	Cost of Sales	35,800.00	30,400.00
60100	Advertising & Marketing	Expenses	18,000.00	22,400.00
60500	Art Class Expense	Cost of Sales	22,000.00	23,800.00
61500	CC, Paypal & Square	Expenses	2,900.00	2,540.00
62000	Accounting & Professional Fees	Expenses	5,000.00	6,538.00
62500	Dues and Subscriptions	Expenses	170.00	170.00
63000	Charitable Contributions Exp	Expenses	0.00	121.95
63050	Fund Raiser Expenses	Expenses	1,500.00	23.79
63500	Insurance	Expenses	510.00	510.00
63800	Landscaping	Expenses	500.00	1,200.00
63900	Miscellaneous Expenses	Expenses	200.00	
64000	Postage	Expenses	220.00	257.00
64500	Printing & Signage	Expenses	150.00	160.00
65000	Rent	Expenses	33,000.00	28,335.00
65200	Repairs Expense	Expenses	500.00	2,293.68

	BUDGET	ACTUAL	
65400 Scholarships Paid	Expenses	2,000.00	2,000.00
65500 Show Expenses	Expenses	3,500.00	3,522.57
66000 Supplies, office & operating	Expenses	2,000.00	2,500.00
66300 Taxes and Licenses	Expenses	50.00	51.85
66500 Telephone	Expenses	1,900.00	1,783.00
67000 Utilities, electric	Expenses	2,000.00	2,060.00
67500 Utilities, water	Expenses	400.00	546.00
89500 Discounts Taken	Expenses	0.00	-72.83
90000 Cash (Over)/Short	Expenses	0.00	-86.70
Revenue		132,100.00	121,477.50
- Cost of Sales		-57,800.00	-54,200.00
Gross Profit		74,300.00	67,277.50
- Expenses		-74,500.00	-76,853.31
Net Income		-200.00	-9,575.81



[illegible]



[illegible]

# Soba

Attachment 11

## Balance Sheet As of February 28, 2021

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
Hilleren Scholarship Fund	1,150.00
Operating Account	83,237.71
Petty Cash	30.30
Scholarship Account	4,450.46
VS Hughes Endowment Res Fund	2,734.92
<b>Total Bank Accounts</b>	<b>\$91,603.39</b>
Other Current Assets	
Undeposited Funds	0.00
<b>Total Other Current Assets</b>	<b>\$0.00</b>
<b>Total Current Assets</b>	<b>\$91,603.39</b>
Fixed Assets	
Accumulated Depreciation	-18,833.00
Building Improvements	34,008.75
Furniture and Fixtures	4,244.17
Landscaping	4,587.92
Office Equipment	1,955.16
<b>Total Fixed Assets</b>	<b>\$25,963.00</b>
<b>TOTAL ASSETS</b>	<b>\$117,566.39</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Sales Tax Payable	0.00
South Carolina Department of Revenue Payable	651.67
<b>Total Other Current Liabilities</b>	<b>\$651.67</b>
<b>Total Current Liabilities</b>	<b>\$651.67</b>
<b>Total Liabilities</b>	<b>\$651.67</b>
Equity	
Retained Earnings	64,112.24
Net Income	52,802.48
<b>Total Equity</b>	<b>\$116,914.72</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$117,566.39</b>



# Soba

Attachment 11

## PROFIT AND LOSS WITH FISCAL YEAR TO DATE September 2019 - August 2020

	TOTAL		
	SEP 2019 - AUG 2020	SEP 2018 - AUG 2019 (PY)	CHANGE
Income			
Art Sales	47,037.60	77,048.30	-30,010.70
Bluffton A-Tax	15,301.34	13,355.40	1,945.94
CCA Income	33,993.00	29,503.00	4,490.00
Fund Raiser	196.00	9,695.60	-9,499.60
Holiday Boutique	3,682.50	2,208.00	1,474.50
Membership Dues	24,625.00	21,120.00	3,505.00
Other Income	4,807.33	10,728.66	-5,921.33
Other Income Scholarship Fund	2,425.00	1,040.00	1,385.00
<b>Total Income</b>	<b>\$132,067.77</b>	<b>\$164,698.96</b>	<b>\$ -32,631.19</b>
Cost of Goods Sold			
Art Class Expense	23,784.53	21,931.75	1,852.78
Artist Commissions	30,452.88	45,244.19	-14,791.31
<b>Total Cost of Goods Sold</b>	<b>\$54,237.41</b>	<b>\$67,175.94</b>	<b>\$ -12,938.53</b>
<b>GROSS PROFIT</b>	<b>\$77,830.36</b>	<b>\$97,523.02</b>	<b>\$ -19,692.66</b>
Expenses			
Accounting & Professional Fees	6,538.35	6,725.00	-186.65
Advertising & Marketing	22,417.85	24,508.82	-2,090.97
Cash (Over)/Short	-86.70	-192.20	105.50
CC, Disc, & Paypal Charges	2,539.53	3,074.28	-534.75
Charitable Contributions	121.95		121.95
Discounts Taken	-72.83	-93.24	20.41
Dues & subscriptions	170.00	165.00	5.00
Fund Raiser Expenses	23.79	1,672.38	-1,648.59
Insurance	510.00	510.00	0.00
Interest	9.12		9.12
Landscaping Expense	1,200.00	960.00	240.00
Miscellaneous Expenses		200.00	-200.00
Postage	257.00	322.60	-65.60
Printing & Signage		51.13	-51.13
Rent	28,335.00	33,942.00	-5,607.00
Repair & Maintenance	2,293.68	856.00	1,437.68
Scholarships Paid	2,000.00		2,000.00
Show Expenses	3,522.57	5,404.21	-1,881.64
Square Fees	99.47		99.47
Supplies, Office & Operating	2,774.33	2,803.32	-28.99
Taxes & Licenses	51.85	50.00	1.85
Telephone	1,783.00	1,908.00	-125.00
Utilities - Electric	2,060.34	2,561.05	-500.71
Utilities - Internet	171.36		171.36
Utilities - Water	546.44	535.28	11.16
<b>Total Expenses</b>	<b>\$77,266.10</b>	<b>\$85,963.63</b>	<b>\$ -8,697.53</b>
<b>NET OPERATING INCOME</b>	<b>\$564.26</b>	<b>\$11,559.39</b>	<b>\$ -10,995.13</b>
<b>NET INCOME</b>	<b>\$564.26</b>	<b>\$11,559.39</b>	<b>\$ -10,995.13</b>



12-5 1(a) A TAX - SPENDING  
Soba

PROFIT AND LOSS WITH FISCAL YEAR TO DATE  
September 2019 - August 2020

	TOTAL
Income	47,037.60
Art Sales	15,301.34
Bluffton A-Tax	33,993.00
CCA Income	196.00
Fund Raiser	3,682.50
Holiday Boutique	24,625.00
Membership Dues	4,807.33
Other Income	2,425.00
Other Income Scholarship Fund	\$132,067.77
<b>Total Income</b>	
Cost of Goods Sold	23,784.53
Art Class Expense	30,452.88
Artist Commissions	\$54,237.41
<b>Total Cost of Goods Sold</b>	\$77,830.36
<b>GROSS PROFIT</b>	
Expenses	6,538.35
Accounting & Professional Fees	22,417.85
Advertising & Marketing	-86.70
Cash (Over)/Short	2,539.53
CC, Disc, & Paypal Charges	121.95
Charitable Contributions	-72.83
Discounts Taken	170.00
Dues & subscriptions	23.79
Fund Raiser Expenses	510.00
Insurance	9.12
Interest	1,200.00
Landscaping Expense	257.00
Postage	28,335.00
Rent	2,293.68
Repair & Maintenance	2,000.00
Scholarships Paid	3,522.57
Show Expenses	99.47
Square Fees	2,774.33
Supplies, Office & Operating	51.85
Taxes & Licenses	1,783.00
Telephone	2,060.34
Utilities - Electric	171.36
Utilities - Internet	546.44
Utilities - Water	\$77,266.10
<b>Total Expenses</b>	\$564.26
<b>ET OPERATING INCOME</b>	\$564.26
<b>NET INCOME</b>	



<b>Society of Bluffton Artists</b> <b>Budget Name: 2019-2020 Budget Rev-03/20</b> <b>For the Period From Sep 1, 2019 to Aug 31, 2020</b>						
Filter Criteria includes: 1) Types: Income Statement Accounts; 2) Active Accounts. Report is printed with Accounts having Zero Amounts. Budget Description:						
Account ID	Account Description	Account Type	9/30/19	10/31/19	11/30/19	12/31/19
40000	Art Sales	Income				
40200	CCA Income	Income	4,500.00	7,328.00	6,115.00	4,065.00
40300	Holiday Boutique	Income	2,142.00	3,125.00	1,950.00	1,300.00
40400	Membership Dues	Income	0.00	0.00	0.00	1,836.00
40500	Other Income 12x12	Income	2,700.00	1,425.00	625.00	200.00
40550	Step Sponsor	Income	0.00	0.00	0.00	0.00
40600	Other Income	Income	0.00	0.00	0.00	0.00
40650	Fund Raiser	Income	120.00	130.00	440.00	860.00
40700	Other Income Scholarship Fur	Income	0.00	0.00	0.00	495.00
40800	Hilleren Fund-Restr to Childre	Income	70.00	217.00	62.00	90.00
40900	Hughes Art Fund	Income	0.00	0.00	0.00	0.00
45300	Bluffton A-Tax	Income	0.00	0.00	0.00	0.00
45400	Comm Foundation of LC Gran	Income	700.00	700.00	700.00	1,000.00
45500	CCA Rent Income	Income	0.00	0.00	0.00	0.00
48000	Sales Returns and Allowances	Income	0.00	0.00	0.00	0.00
49000	Sales Discounts	Income	0.00	0.00	0.00	0.00
50000	Cost of Goods Sold	Cost of Sales	0.00	0.00	0.00	0.00
57000	Cost of Sales-Salaries and W	Cost of Sales	0.00	0.00	0.00	0.00
57500	Cost of Sales-Freight	Cost of Sales	0.00	0.00	0.00	0.00
58000	Cost of Sales-Other	Cost of Sales	0.00	0.00	0.00	0.00
59000	Purchase Returns and Allowa	Cost of Sales	0.00	0.00	0.00	0.00
60000	Artist Commissions	Cost of Sales	0.00	0.00	0.00	0.00
60100	Advertising & Marketing	Expenses	2,925.00	4,763.00	3,975.00	2,642.00
60500	Art Class Expense	Cost of Sales	2,411.00	2,068.00	2,044.00	1,735.00
60600	Cost of Goods 12x12	Cost of Sales	1,170.00	4,767.00	3,471.00	221.00
60700	Cost of Goods Note Cards	Cost of Sales	0.00	0.00	0.00	0.00
61000	Auto Expenses	Expenses	0.00	0.00	0.00	0.00
61500	CC Disc & Paypal Chgs	Expenses	0.00	0.00	0.00	0.00
62000	Accounting & Professional Fe	Expenses	164.00	202.00	198.00	253.00
62200	Grant Expenses - CCA	Expenses	525.00	950.00	525.00	525.00
62300	Depreciation Expense	Expenses	0.00	0.00	0.00	0.00
62500	Dues and Subscriptions	Expenses	0.00	0.00	0.00	0.00
63000	Charitable Contributions Exp	Expenses	0.00	0.00	0.00	0.00
63050	Fund Raiser Expenses	Expenses	0.00	0.00	0.00	0.00
63100	Hilleren Scholarships	Expenses	0.00	209.00	0.00	0.00
63200	Hughes Scholarships	Expenses	0.00	0.00	0.00	0.00
63500	Insurance	Expenses	0.00	0.00	0.00	0.00
63800	Landscaping	Expenses	0.00	510.00	0.00	0.00
63900	Miscellaneous Expenses	Expenses	0.00	0.00	0.00	280.00
64000	Postage	Expenses	0.00	0.00	0.00	0.00
64500	Printing & Signage	Expenses	0.00	55.00	0.00	0.00
65000	Rent	Expenses	0.00	0.00	0.00	0.00
65200	Repairs Expense	Expenses	2,791.00	2,791.00	2,791.00	2,791.00
65400	Scholarships Paid	Expenses	225.00	160.00	100.00	150.00
65500	Show Expenses	Expenses	0.00	0.00	0.00	0.00
65600	Storage rent	Expenses	0.00	51.00	138.00	0.00
66000	Supplies, office & operating	Expenses	0.00	0.00	0.00	0.00
66300	Taxes and Licenses	Expenses	60.00	147.00	381.00	268.00
66500	Telephone	Expenses	0.00	0.00	0.00	50.00
67000	Utilities, electric	Expenses	154.00	156.00	154.00	159.00
67500	Utilities, water	Expenses	260.00	263.00	171.00	235.00
77500	Wages Expense	Expenses	29.91	35.72	31.85	30.00
89500	Discounts Taken	Expenses	0.00	0.00	0.00	0.00
90000	Cash (Over)/Short	Expenses	0.00	0.00	0.00	0.00
Revenue						
- Cost of Sales			10,232.00	12,925.00	9,892.00	9,846.00
			-4,095.00	-9,530.00	-7,446.00	-2,863.00
Gross Profit			6,137.00	3,395.00	2,446.00	6,983.00



# SUSA BUDGET SEPT 1, 2019 - AUG 31, 2020

1/31/20	2/29/20	3/31/20	4/30/20	5/31/20	6/30/20	7/31/20	8/31/20	YTD Total
3,131.00	7,349.00	9,954.00	4,500.00	6,462.00	4,211.00	5,600.00	4,000.00	67,215.00
3,295.00	1,710.00	2,848.00	2,075.00	6,653.00	2,920.00	1,500.00	1,500.00	31,018.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,836.00
1,150.00	475.00	900.00	500.00	170.00	275.00	1,375.00	15,000.00	24,795.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	3,000.00	1,100.00	0.00	500.00	300.00	100.00	100.00	6,650.00
3,875.00	5,076.00	250.00	0.00	0.00	0.00	0.00	0.00	9,696.00
64.00	64.00	40.00	42.00	261.00	61.00	17.00	0.00	988.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2,000.00	1,000.00	1,000.00	1,000.00	2,000.00	1,000.00	1,000.00	2,000.00	14,100.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2,035.00	4,777.00	6,470.00	2,925.00	4,200.00	2,737.00	3,640.00	2,600.00	43,689.00
2,040.00	3,052.00	1,925.00	2,121.00	1,871.00	1,730.00	1,750.00	1,750.00	24,497.00
689.00	545.00	2,579.00	0.00	5,737.00	1,771.00	946.00	975.00	22,871.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
209.00	191.00	262.00	489.00	396.00	243.00	175.00	175.00	2,957.00
525.00	525.00	525.00	525.00	525.00	525.00	525.00	525.00	6,725.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	165.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
686.00	736.00	0.00	0.00	0.00	0.00	0.00	0.00	165.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,631.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
280.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
55.00	0.00	0.00	0.00	0.00	400.00	0.00	0.00	510.00
0.00	0.00	0.00	55.00	200.00	0.00	0.00	0.00	960.00
0.00	0.00	0.00	0.00	0.00	0.00	55.00	0.00	200.00
2,791.00	2,791.00	2,791.00	0.00	0.00	50.00	0.00	0.00	220.00
100.00	100.00	0.00	2,881.00	2,881.00	2,881.00	2,881.00	2,881.00	33,942.00
0.00	0.00	0.00	150.00	50.00	0.00	0.00	0.00	1,035.00
134.00	231.00	2,767.00	2,026.00	2,000.00	0.00	0.00	0.00	2,000.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,347.00
404.00	0.00	529.00	144.00	450.00	77.00	300.00	300.00	3,060.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00
158.00	157.00	159.00	165.00	160.00	162.00	165.00	165.00	1,914.00
231.00	166.00	167.00	163.00	195.00	249.00	275.00	275.00	2,650.00
36.00	32.00	34.00	33.00	31.00	34.00	34.00	35.00	396.48
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
13,515.00	18,674.00	16,092.00	8,117.00	16,046.00	8,767.00	9,592.00	22,600.00	156,298.00
-2,724.00	-5,322.00	-9,049.00	-2,925.00	-9,937.00	-4,508.00	-4,586.00	-3,575.00	-66,560.00
10,791.00	13,352.00	7,043.00	5,192.00	6,109.00	4,259.00	5,006.00	19,025.00	89,738.00



G 3-d

Soba

Attachment 11

Budget Overview: FY2021 - FY21 P&L  
September 2020 - August 2021

	SEP 2020	OCT 2020	NOV 2020	DEC 2020	JAN 2021	FEB 2021	MAR 2021	APR 2021	MAY 2021	JUN 2021	JUL 2021	AUG 2021	TOTAL
<b>Income</b>													
Art Sales	4,583.33	4,583.33	4,583.33	4,583.33	4,583.33	4,583.33	4,583.33	4,583.33	4,583.33	4,583.33	4,583.33	4,583.37	\$55,000.00
Bluffton A-Tax	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	1,175.00	\$14,100.00
CCA Income	2,833.33	2,833.33	2,833.33	2,833.33	2,833.33	2,833.33	2,833.33	2,833.33	2,833.33	2,833.33	2,833.33	2,833.37	\$34,000.00
Fund Raiser	583.33	583.33	583.33	583.33	583.33	583.33	583.33	583.33	583.33	583.33	583.33	583.37	\$7,000.00
Holiday Boutique	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	\$3,000.00
Membership Dues	1,083.33	1,083.33	1,083.33	1,083.33	1,083.33	1,083.33	1,083.33	1,083.33	1,083.33	1,083.33	1,083.33	1,083.37	\$13,000.00
Other Income	333.33	333.33	333.33	333.33	333.33	333.33	333.33	333.33	333.33	333.33	333.33	333.37	\$4,000.00
Other Income Scholarship Fund	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.63	\$2,000.00
<b>Total Income</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.32</b>	<b>\$11,008.48</b>	<b>\$132,100.00</b>
<b>Cost of Goods Sold</b>													
Art Class Expense	1,833.33	1,833.33	1,833.33	1,833.33	1,833.33	1,833.33	1,833.33	1,833.33	1,833.33	1,833.33	1,833.33	1,833.37	\$22,000.00
Artist Commissions	2,983.33	2,983.33	2,983.33	2,983.33	2,983.33	2,983.33	2,983.33	2,983.33	2,983.33	2,983.33	2,983.33	2,983.37	\$35,800.00
<b>Total Cost of Goods Sold</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.66</b>	<b>\$4,816.74</b>	<b>\$57,800.00</b>
<b>GROSS PROFIT</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.66</b>	<b>\$6,191.74</b>	<b>\$74,300.00</b>
<b>Expenses</b>													
Accounting & Professional Fees	416.67	416.67	416.67	416.67	416.67	416.67	416.67	416.67	416.67	416.67	416.67	416.63	\$5,000.00
Advertising & Marketing	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	\$18,000.00
CC, Disc, & Paypal Charges	241.67	241.67	241.67	241.67	241.67	241.67	241.67	241.67	241.67	241.67	241.67	241.63	\$2,900.00
Dues & subscriptions	14.17	14.17	14.17	14.17	14.17	14.17	14.17	14.17	14.17	14.17	14.17	14.13	\$170.00
Fund Raiser Expenses	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	\$1,500.00
Insurance	42.50	42.50	42.50	42.50	42.50	42.50	42.50	42.50	42.50	42.50	42.50	42.50	\$510.00
Landscaping Expense	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.63	\$500.00
Miscellaneous Expenses	16.67	16.67	16.67	16.67	16.67	16.67	16.67	16.67	16.67	16.67	16.67	16.63	\$200.00
Postage	18.33	18.33	18.33	18.33	18.33	18.33	18.33	18.33	18.33	18.33	18.33	18.37	\$220.00
Printing & Signage	12.50	12.50	12.50	12.50	12.50	12.50	12.50	12.50	12.50	12.50	12.50	12.50	\$150.00
Rent	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	2,750.00	\$33,000.00
Repair & Maintenance	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.67	41.63	\$500.00
Scholarships Paid	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.63	\$2,000.00
Show Expenses	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.67	291.63	\$3,500.00
Supplies, Office & Operating	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.63	\$2,000.00
Taxes & Licenses	4.17	4.17	4.17	4.17	4.17	4.17	4.17	4.17	4.17	4.17	4.17	4.13	\$50.00
Telephone	158.33	158.33	158.33	158.33	158.33	158.33	158.33	158.33	158.33	158.33	158.33	158.37	\$1,900.00
Utilities - Electric	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.63	\$2,000.00
Utilities - Water	33.33	33.33	33.33	33.33	33.33	33.33	33.33	33.33	33.33	33.33	33.33	33.37	\$400.00
<b>Total Expenses</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.36</b>	<b>\$6,208.04</b>	<b>\$74,500.00</b>
<b>NET OPERATING INCOME</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.30</b>	<b>\$ -200.00</b>
<b>NET INCOME</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.70</b>	<b>\$ -16.30</b>	<b>\$ -200.00</b>

## PROFIT AND LOSS WITH FISCAL YEAR TO DATE

September 2019 - August 2020

	TOTAL		
	SEP 2019 - AUG 2020	SEP 2018 - AUG 2019 (PY)	
Income			
Art Sales	47,037.60	77,048.30	-30,
Bluffton A-Tax	15,301.34	13,355.40	1,
CCA Income	33,993.00	29,503.00	4,
Fund Raiser	196.00	9,695.60	-9,
Holiday Boutique	3,682.50	2,208.00	1,
Membership Dues	24,625.00	21,120.00	3,
Other Income	4,807.33	10,728.66	-5,
Other Income Scholarship Fund	2,425.00	1,040.00	1,
<b>Total Income</b>	<b>\$132,067.77</b>	<b>\$164,698.96</b>	<b>\$ -32,0</b>
Cost of Goods Sold			
Art Class Expense	23,784.53	21,931.75	1,8
Artist Commissions	30,452.88	45,244.19	-14,7
<b>Total Cost of Goods Sold</b>	<b>\$54,237.41</b>	<b>\$67,175.94</b>	<b>\$ -12,9</b>
<b>GROSS PROFIT</b>	<b>\$77,830.36</b>	<b>\$97,523.02</b>	<b>\$ -19,6</b>
Expenses			
Accounting & Professional Fees	6,538.35	6,725.00	-1
Advertising & Marketing	22,417.85	24,508.82	-2,0
Cash (Over)/Short	-86.70	-192.20	1
CC, Disc, & Paypal Charges	2,539.53	3,074.28	-5
Charitable Contributions	121.95		1
Discounts Taken	-72.83	-93.24	
Dues & subscriptions	170.00	165.00	
Fund Raiser Expenses	23.79	1,672.38	-1,6
Insurance	510.00	510.00	
Interest	9.12		
Landscaping Expense	1,200.00	960.00	2
Miscellaneous Expenses		200.00	-2
Postage	257.00	322.60	.
Printing & Signage		51.13	.
Rent	28,335.00	33,942.00	-5,6
Repair & Maintenance	2,293.68	856.00	1,4
Scholarships Paid	2,000.00		2,0
Show Expenses	3,522.57	5,404.21	-1,8
Square Fees	99.47		
Supplies, Office & Operating	2,774.33	2,803.32	.
Taxes & Licenses	51.85	50.00	
Telephone	1,783.00	1,908.00	-1
Utilities - Electric	2,060.34	2,561.05	-5
Utilities - Internet	171.36		1
Utilities - Water	546.44	535.28	
<b>Total Expenses</b>	<b>\$77,266.10</b>	<b>\$85,963.63</b>	<b>\$ -8,6</b>
<b>NET OPERATING INCOME</b>	<b>\$564.26</b>	<b>\$11,559.39</b>	<b>\$ -10,9</b>
<b>NET INCOME</b>	<b>\$564.26</b>	<b>\$11,559.39</b>	<b>\$ -10,9</b>





In reply refer to: 0248367569  
May 05, 2016 LTR 4168C 0  
74-3012888 000000 00

00023213

BODC: TE

SOCIETY OF BLUFFTON ARTISTS INC  
% DAVID POST TREASURER  
PO BOX 1972  
BLUFFTON SC 29910

056071

Employer ID Number: 74-3012888  
Form 990 required: YES

Dear Taxpayer:

This is in response to your request dated Apr. 26, 2015, regarding your tax-exempt status.

We issued you a determination letter in September 2002, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

Our records also indicate you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If a return is required, you must file Form 990, 990-EZ, 990-N, or 990-PF by the 15th day of the fifth month after the end of your annual accounting period. IRC Section 6033(j) provides that, if you don't file a required annual information return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

For tax forms, instructions, and publications, visit [www.irs.gov](http://www.irs.gov) or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).



**South Carolina Secretary of State Mark Hammond**

**Business Entities Online**

File, Search, and Retrieve Documents Electronically  
In partnership with SC.gov

SOCIETY OF BLUFFTON ARTISTS THE **Corporate**

**Information**

Entity Type Nonprofit  
Status Good Standing  
Domestic/Foreign Domestic  
Incorporated State South Carolina

**Important Dates**

Effective Date 08/27/2001  
Expiration Date N/A  
Term End Date N/A  
Dissolved Date N/A

**Registered Agent**

Agent DOREEN PRINCE  
Address 11 OAKMAN BRANCH RD  
HILTON HEAD ISLAND, South Carolina 29928

**Official Documents on File**

Official Documents On File

<b>Filing Type</b>	<b>Filing Date</b>
Amendment	08/06/2002

Change of Agent or Office 06/03/2002

Incorporation 08/27/2001

For filing questions please contact us at **803-734-2158**



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2020 taxes

2020 Kenney taxes 1  
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John +

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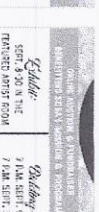
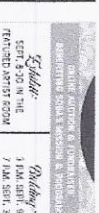
BlufftonSun-Judge...

BlufftonSun-Mar...

BlufftonSun-Open...

BlufftonSun-Richar...

BlufftonSun-Steve...





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## 57 Attachments

PRINT POP-UP

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*Ernst & Moritz and company, 1880*

Index	Reading	Discussion
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95	1.95	1.95
96	1.96	1.96
97	1.97	1.97
98	1.98	1.98
99	1.99	1.99
100	2.00	2.00

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*Donna Karp*

Unique handcrafted  
boleros, shirts and dresses  
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100

THROUGH DECEMBER 10  
CENTER FOR CREATIVE ARTS

11 a.m.-3 p.m. Sunday-Wednesday

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► **Information** Publishing Turns its Back on the Southern Ladies on Oct. 6.

Washburn Media, Co., Ltd.

**A MEMBER**

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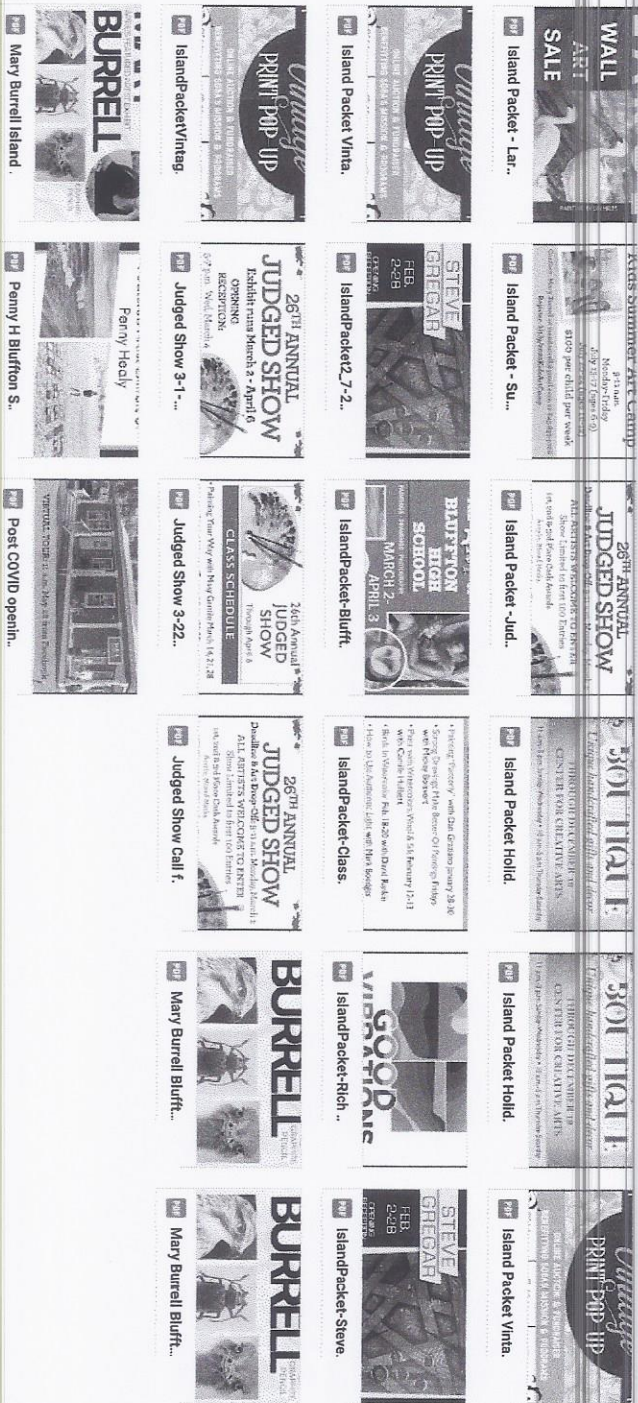
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*The 27th Annual Judged Show  
Registration Deadline is June 25th*

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## Upcoming Classes and Workshops

SOBA assists artists, at all levels of development, enhancing their abilities in the visual arts. SOBA's Center for Creative Arts is a

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The HeART of Bluffton 

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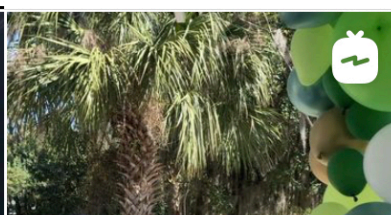
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Bluffton HS



New







## Society of Bluffton Artists

@sobabluffton · Art Gallery

 **Edit Send Message**

Quarterly Deadlines for application submittals:  
June 30, September 30, December 31, and March 31

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

**ACCOMMODATIONS TAX**  
**FUNDS REQUEST APPLICATION**

**For Office Use Only**

Date Received:  Time Received:  By:

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Date:  March 31, 2021 Total Project Costs:  55,500 Total Amount Requested:  27,500

**SUBMIT 15 COMPLETE COPIES OF APPLICATION**

**ANSWERS MUST BE TYPEWRITTEN**

A. PROJECT NAME:  Bluffton Juneteenth Celebration

B. ORGANIZATION:  Bluffton MLK Observance Committee

**MUST BE A NOT-FOR-PROFIT ENTITY**

Sponsor Name:  Jacqueline Brown Title:  Secretary, Bluffton MLK

Sponsor Address:  PO Box 3737

Sponsor Phone:  Bluffton, SC 29910

Contact Name:  Katherine Louw Title:  Director of Good, Watterson Brands -

Contact Address:  1227 May River Road Bluffton, SC 29910

Contact Phone:  615-804-0758

## 1. General Description:

The Juneteenth events, scheduled for June 19 & 20, 2021 at the beautiful, new Burnt Church Distillery will celebrate Bluffton's rich, cultural heritage while spotlighting some of the amazing, local talent from our black community. The family-friendly Saturday festival will be educational and entertaining, providing ample opportunities for guests to shop and sample a variety of local flavors while enjoying musical, dance, and spoken word entertainment. Sunday's Jazz Brunch will offer smooth jazz entertainment with a special

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

The purpose of this event is to showcase our community's heritage and, to celebrate it, and to share it with all who come. Please see the attached tentative program outline, which lists confirmed artists and entertainers.

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

In 2019 our Juneteenth celebration drew a crowd of around 1,000 visitors to the Heyward House, and in 2020 those numbers doubled for the event at Eagle Field. We know that last year's event included attendees from Savannah, Charleston, Charlotte, and other regional locations. With our expanded plans for advertising, and the addition of a Sunday event, we plan to promote Bluffton's Juneteenth Celebration as a weekend event and will include accommodations information on

4. Duration of project: Starting Date: June 19, 2021 Completion Date: June 20, 2021

## 5. Permits required (if any):

## 6. Additional Comments:

The Bluffton MLK Observance Committee officially received status as a 501(c)3 organization in early March 2021 so there are no financials to share. Previous year's events have been done on a shoestring budget, with many vendors and artists donating their time and talents. This year, with the partnership of Burnt Church Distillery, and the momentum of becoming a

## D. FUNDING:

1. Source of funds: Burnt Church Distillery, Other corporate sponsors (pending), Lowcountry Leg

2. Have you requested funding from other sources or organizations for this project? Yes

If yes, please list sources and amounts.

Burnt Church Distillery (includes some in-kind value)

Amount: 13,000

Other corporate/foundation sponsors (pending)

Amount: 10,000

Town of Bluffton (pending)

Amount: 5,000

## 3. Contributions to the project by the sponsoring organization:

Bluffton MLK Observance Committee

Amount: 2,500



## E. FINANCIAL INFORMATION (ADHERE TO STRICTLY):

1. A line-item budget of the project.
2. Most recent fiscal year balance sheet and profit and loss accounting statement.

## F. FINANCIAL GUARANTEES:

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 contemplated in the application, should funding be approved.

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

1. How did you use the funds?

NA
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2. What impact did this have on the community or benefit tourism?  
Describe how tourism statistics were captured.

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3. Provide the previous two years and current budgets.
4. Include the **total annual funding** received each year that you applied.

## H. ADDITIONAL COMMENTS: (Attach additional sheets, if needed):

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Signature: 

Jacqueline Brown
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## APPLICATION FINAL CHECKLIST

(Complete and return this list with the application)

- ☒ The application is being filed by the deadline as indicated in this application packet.
- ☒ We have reviewed and followed the application guidelines.
- ☐ We are submitting 15 complete copies of the application.
- ☒ We will be prepared to make a verbal presentation to the Committee and answer questions when we are scheduled to do so.
- ☒ **We did not bind the application (NO BOOKS or BINDERS).**

# Accommodations Tax Funding Final Report

Attachment 11

You may record information directly on this form or create a separate document for more detailed responses.

## 1. PROJECT INFORMATION:

Organization Name:	<input type="text"/>
Project Name:	<input type="text"/>
Contact Name:	<input type="text"/>

## 2. PROJECT COMPLETION:

Were you able to complete the project as stated in your original application?	<input type="text"/>
If no, state discrepancies.	<input type="text"/>

## 3. PROJECT SUCCESS:

Please share any additional comments regarding the project (e.g., lessons learned, successes, problems encountered, etc.)

## 4. PROJECT ATTENDANCE:

Record numbers in table below. Numbers are to reflect attendance and funds received for projects for both the current and previous periods.

	Prior Period	Current Period
Total budget of event / project	<input type="text"/>	<input type="text"/>
Amount funded by Town of Bluffton Accommodatons Tax	<input type="text"/>	<input type="text"/>
Amount funded by other sources	<input type="text"/>	<input type="text"/>
Total attendance	<input type="text"/>	<input type="text"/>
Total tourists	<input type="text"/>	<input type="text"/>

## 5. Methods:

Please describe the methods used to capture the attendace data listed above (e.g., license plates, surveys, zip codes, etc.)

## 6. Project Budget:

Please attach report indicating project expenses compared to budget for the current grant.

## 7. Organization Signature:

Provide signature of official within organization, verifying accuracy of above statements.

Name:	<input type="text"/>	Title:	<input type="text"/>
Signature:	<input type="text"/>	Date:	<input type="text"/>



SoBA ATax Application

Final Report – 3:

We were able to pay our bills thanks to the Atax grant during this difficult time. Our income was reduced and we hope to recover that in the year to come. We learned that we are flexible and adaptable and we survived when other did not. We greatly appreciate the support of the community and especially the town of Bluffton.

# ACCOMMODATIONS TAX ADVISORY COMMITTEE

## STAFF REPORT

### Department of Finance & Administration



MEETING DATE: May 18, 2021  
 SUBJECT: Society of Bluffton Artists: Promoting the Arts in the Lowcountry and Beyond  
 PROJECT MANAGER: Natalie Majorkiewicz, CGFO, Treasury Manager

Summarized below is the application from the Society of Bluffton Artists (SoBA) for Accommodations Tax grant dollars in support of advertising and promotion of tourism.

**Requested Amount: \$18,200.**

Promoting the Arts in the Lowcountry and Beyond	Total Budget	Recommended ATAX Grant (50% of project budget)
Advertising and Promotion:	\$ 36,400	\$ 18,200
<b>Total</b>	<b>\$ 36,400</b>	<b>\$ 18,200</b>

Eligible "Tourism-Related Expenditures" per South Carolina Code of Laws include, *"advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity"* and *"promotion of the arts and cultural events"*

Advertising and Promotion:

- Total budget is \$36,400
- Eligible budgeted expenses:
  - Regional Marketing: \$7,000
  - Bragg Media: \$27,900
  - Promotional Expenses: \$1,500

Festival/Event: N/A

Bluffton Event: The gallery/education center is located at 6 Church Street in Old Town Bluffton.

Tourism Draw %: Due to COVID 2020 statistics were unable to be captured. The 2021 sales will be captured using the guest register.

Benefit to Tourism: Traditionally, SoBA has attracted and sold to over 60% tourists annually.

Self-Sufficiency % (Financial Need): Requesting \$18,200, which is 50% of the advertising and promotion budget. .

**Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)**

Amount Recommended	Advertising (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Misc. (10)	Total of 40 possible	Comments
\$18,200	N/A	N/A	N/A	N/A	N/A	N/A	Electronic Meeting

**Previous Funding Amounts to Organization - Society of Bluffton Artists (SoBA)**

Fiscal Year	Amount Requested	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
2020	\$16,000.00	50%	\$12,000.00	\$12,000.00	\$ 12,000.00	
2019	14,000.50	50%	14,000.50	14,000.50	14,000.50	
2018	12,150.00	45%	12,150.00	12,150.00	12,150.00	

Accommodations Tax Committee Recommendations and Comments:

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The Committee recommends funding \$18,200 for advertising and promotion of tourism expenses.



**Table Rating Matrix-----COMMITTEE AVERAGE POINTS-----****Points  
Awarded****Advertising possible total points - 15**

Part 1 - 5 points possible based on how much of the requested funds go toward advertising

0% of funds go toward advertising	0 points
1% - 20% of funds go toward advertising	1 points
21% - 40% of funds go toward advertising	2 points
41% - 60% of funds go toward advertising	3 points
61% - 80% of funds go toward advertising	4 points
81% - 100% of funds go toward advertising	5 points

Part 2 - 10 points possible based on where the advertising is placed

None of the funds go toward advertising	0 points
Local newspapers/periodicals and electronic advertising (examples Island Packet, Bluffton Today)	2 points
Local guides/periodicals specifically geared toward tourists with a shelf life of more than 30 days	4 points
Larger regional publications and electronic marketing within 100 miles (example Charleston or Savannah newspapers)	6 points
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (example Atlanta Journal/Constitution, Charlotte newspaper, Washington Post ,Chicago Tribune)	8 points
Nationally distributed newspapers/periodicals/electronic marketing (example, USA Today, New York Times, Time Magazine, Southern Living, airline in-flight magazines)	10 points

**Festival/Event possible total points - 5**

- higher point value given to requests for festivals or events
- length of event or festival should be considered. Is it an all-day event versus a two-hour event?
- higher point value could be awarded for multi-day festivals

**Bluffton Event possible total points - 5**

- higher point value given to events held within the town limits of Bluffton
- higher point value given to events spanning multiple locations?

**Tourism Draw possible total points - 5**

0% of attendees are tourists based on historical or projected information	0 points
1% - 20% of attendees are tourists based on historical or projected info	1 points
21% - 40% of attendees are tourists based on historical or projected info	2 points
41% - 60% of attendees are tourists based on historical or projected info	3 points
61% - 80% of attendees are tourists based on historical or projected info	4 points
81% - 100% of attendees are tourists based on historical or projected info	5 points

**Benefit to Tourism (economy) possible total points - 5**

- higher point value given to events that encourage overnight stays
- higher point value given to events that have local business participation

**Self Sufficiency possible total points - 5**

100% of budget from ATAX request	0 points
80% - 99% of budget from ATAX request	1 point
60% - 79% of budget from ATAX request	2 points
40% - 59% of budget from ATAX request	3 points
20% - 39% of budget from ATAX request	4 points
1% - 19% of budget from ATAX request	5 points

**Miscellaneous possible total points – 10 (Only use if applicant does not qualify as a festival/event)****Group Average Grand Point Total out of a possible 40 points****Group Average % (out of 40 points)**

Grant Requests	Amount Requested	Advisory Committee Recommendation	Town Council Approved	Paid FY 2019	Paid FY 2020	Paid FY 2021	Remaining
<b>Applications Received March 31, 2019</b>							
Beaufort CO. PALs - Dixie Jr. Boys & Boys Baseball State Tournament	\$ 54,950	\$ 54,950	\$ 54,950	\$ -	\$ -	\$ -	\$ 54,950
Beaufort CO. PALs - Dixie Youth Baseball Ozone State Tournament	59,500	59,500	59,500	-	-	-	59,500
Bluffton Historical Preservation Society: Annual Amount \$190,000	190,000	190,000	190,000	-	149,450	-	40,550
Greater Bluffton Convention Visitors Bureau	47,990	43,990	-	-	-	-	-
Hilton Head Island Concours d' Elegance	17,500	17,500	17,500	-	15,830	-	1,670
Society of Bluffton Artists	14,001	14,001	14,001	1,206	12,795	-	-
<b>Total Grants for 3rd Quarter Payments</b>	<b>\$ 383,941</b>	<b>\$ 379,941</b>	<b>\$ 335,951</b>	<b>\$ 1,206</b>	<b>\$ 178,075</b>	<b>\$ -</b>	<b>\$ 156,670</b>
<b>Applications Received June 30, 2019</b>							
Historic Bluffton Arts & Seafood Festival	\$ 43,000	\$ 43,000	\$ 43,000	\$ -	\$ 27,078	\$ 8,015	\$ 7,906
Old Town Bluffton Merchants Society	25,000	25,000	25,000	-	14,951	8,481	1,568
Palmetto Bluff Conservancy: Annual Holiday Celebration and Tree Lighting	25,000	25,000	25,000	-	17,588	-	7,412
Palmetto Bluff Conservancy: May River Music Festival	60,000	60,000	60,000	-	38,600	-	21,400
<b>Total Grants for 4th Quarter Payments</b>	<b>\$ 153,000</b>	<b>\$ 153,000</b>	<b>\$ 153,000</b>	<b>\$ -</b>	<b>\$ 98,218</b>	<b>\$ 16,496</b>	<b>\$ 38,286</b>
<b>Applications Received September 30, 2019</b>							
Farmers Market of Bluffton	\$ 22,450	\$ 22,138	\$ 22,138	\$ -	\$ 4,458	\$ 9,851	\$ 7,828
Greater Bluffton Chamber of Commerce: Taste of Bluffton 2020	50,000	40,318	40,318	-	3,087	8,401	28,831
Hilton Head Symphony Orchestra: Symphony Under the Stars	18,000	18,000	18,000	-	12,136	-	5,864
Lowcountry Gullah: LowcountryGullah.com	N/A	N/A	-	-	-	-	-
Visitors and Convention Bureau Inc.: The Bluffton Welcome Center	N/A	N/A	-	-	-	-	-
<b>Total Grants for 1st Quarter Payments</b>	<b>\$ 90,450</b>	<b>\$ 80,456</b>	<b>\$ 80,456</b>	<b>\$ -</b>	<b>\$ 19,681</b>	<b>\$ 18,252</b>	<b>\$ 42,523</b>
<b>Applications Received December 31, 2019</b>							
Celebrate Bluffton, Inc.	\$ 7,132	\$ 7,132	\$ 7,132	\$ -	\$ -	\$ 1,018	\$ 6,114
May River Theatre, Inc.	14,520	14,520	14,520	-	-	-	14,520
Visitors and Convention Bureau Inc.: The Bluffton Welcome Center	50,000	N/A	-	-	-	-	-
<b>Total Grants for 2nd Quarter Payments</b>	<b>\$ 71,652</b>	<b>\$ 21,652</b>	<b>\$ 21,652</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,018</b>	<b>\$ 20,634</b>
<b>Applications Received March 31, 2020</b>							
Bluffton Historical Preservation Society: Annual Amount \$190,000	\$ 190,000	\$ 190,000	\$ 190,000	\$ -	\$ -	\$ 68,062	\$ 121,938
Palmetto Bluff Conservancy: Well Living	100,000	66,095	N/A	-	-	-	-
Society of Bluffto Artists (SoBA)	16,000	12,000	12,000	-	1,117	10,883	0
<b>Total Grants for 3rd Quarter Payments</b>	<b>\$ 306,000</b>	<b>\$ 268,095</b>	<b>\$ 202,000</b>	<b>\$ -</b>	<b>\$ 1,117</b>	<b>\$ 78,945</b>	<b>\$ 121,938</b>
<b>Applications Received June 30, 2020</b>							
Historic Bluffton Arts & Seafood Festival	\$ 17,000	\$ 17,000	\$ 17,000	\$ -	\$ -	\$ 6,499	\$ 10,501
Old Town Bluffton Merchants Society	22,600	22,600	22,600	-	-	5,796	16,804
<b>Total Grants for 4th Quarter Payments</b>	<b>\$ 39,600</b>	<b>\$ 39,600</b>	<b>\$ 39,600</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 12,295</b>	<b>\$ 27,305</b>
<b>Applications Received September 30, 2020</b>							
Hilton Head Symphony Orchestra: BravoPiano! Festival Concert	\$ 6,000	\$ 6,000	\$ 6,000	\$ -	\$ -	\$ -	\$ 6,000
<b>Total Grants for 4th Quarter Payments</b>	<b>\$ 6,000</b>	<b>\$ 6,000</b>	<b>\$ 6,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 6,000</b>
<b>Applications Received December 31, 2020</b>							
Farmers Market of Bluffton	\$ 33,800	\$ 33,800	\$ 33,800	\$ -	\$ -	\$ 3,258	\$ 30,542
<b>Total Grants for 4th Quarter Payments</b>	<b>\$ 33,800</b>	<b>\$ 33,800</b>	<b>\$ 33,800</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 3,258</b>	<b>\$ 30,542</b>
<b>Applications Received March 31, 2021</b>							
Bluffton MLK Observance Committee	\$ 27,500	\$ 27,500	\$ -	\$ -	\$ -	\$ -	\$ -
Bluffton Historical Preservation Society: Annual Amount \$169,000	169,000	169,000	-	-	-	-	-
Society of Bluffto Artists (SoBA)	20,000	18,200	-	-	-	-	-
<b>Total Grants for 4th Quarter Payments</b>	<b>\$ 216,500</b>	<b>\$ 214,700</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Total Grants</b>	<b>\$ 1,300,943</b>	<b>\$ 1,197,243</b>	<b>\$ 872,459</b>	<b>\$ 1,206</b>	<b>\$ 297,091</b>	<b>\$ 130,264</b>	<b>443,898</b>

Recommendation of Motions

1. "I make a motion to adopt the Resolution for the FY2022 budget and marketing plan presented by the Hilton Head Island-Bluffton Chamber of Commerce in accordance with contract 2019-33 as the Town of Bluffton's Designated Marketing Organization."
2. "I make a motion to grant the Bluffton MLK Observance Committee \$27,500 in support of the Bluffton Juneteenth event as presented in the Staff Report breakdown for advertising and promotion of tourism, facilities for civic and cultural events expenses, municipality services, and tourist transportation."
3. "I make a motion to adopt the Resolution renewing Memorandum of Agreement 2017-69 for an addition fiscal year term beginning on July 1, 2021 through Amendment 3 between the Town of Bluffton and the Historic Bluffton Foundation for Welcome Center services."
4. "I make motion to grant the Society of Bluffton Artists \$18,200 in support of the Promoting the Arts in the Lowcountry and Beyond project as presented in the Staff Report breakdown for advertising and promotion tourism expenses."