

ACCOMMODATIONS TAX ADVISORY COMMITTEE

STAFF REPORT

Department of Finance & Administration



MEETING DATE: May 21, 2024
 SUBJECT: Historic Bluffton Foundation: FY2025 Heyward House - 1st Quarter
 PROJECT MANAGER: Shannon Milroy, Budget, Grants & Procurement Administrator

Summarized below is the application from the Historic Bluffton Foundation for Accommodations Tax grant dollars to operate and maintain the Heyward House as the Town's Welcome Center, as well as marketing dollars, for the first quarter of Fiscal Year 2025 (July - September 2024).

Total Budget: \$342,300 (annual) / \$85,575 (quarterly)

Requested Amount: \$160,000 (annual) / \$40,000 (quarterly)

Percentage of Request^: 46.74%

^Includes up to 100% for Advertising & Promotion plus up to 50% of remaining expenses

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category	Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$7,800	
Facilities for Civic and Cultural Events	124,300	
Public Facilities		
Municipality and County Services		*
Tourist Transportation		*
Visitors Centers	207,200	\$40,000
Other/Ineligible Project Expenses	3,000	
Total	\$342,300	\$40,000

*Reimbursement will be based on the estimated percentage of tourists provided for

Budgeted Expenses:

Advertising & Promotion:

Total budget \$7,800

- Includes advertising as well as their web site.

Facilities for Civic and Cultural Events:

Total budget \$124,300

- Structural Drawings, Bid Ready Plans and Construction of Structural Repairs

Visitors Center Expenses:

Total budget \$207,200

- Operating expenses including salaries and benefits, insurance, utilities, programs, postage, dues and subscriptions, office supplies, and contracted services such as accounting, cleaning, landscaping and pest control.

Other/Ineligible Project Expenses:

Total budget \$3,000

- Bank Fees

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
\$40,000	9	5	5	4	9	32	

Advertising: Of the total projected annual budget of \$160,000, approximately 2% is anticipated to be spent on advertising; this encompasses web site costs as well as advertising like brochures placed at hotels in Beaufort County, the airport, SC Welcome Centers, the Gullah Geechee Museum, and with the HHI-Bluffton Chamber of Commerce, Greater Bluffton Chamber of Commerce, Beaufort Regional Chamber of Commerce, the Town of Bluffton and other historic sites.

Tourism Draw %: In 2023, the Heyward House Museum and Welcome Center served 18,550 visitors with 87% of those being non-locals.

Benefit to Tourism: The Heyward House currently serves as the official Town of Bluffton Visitor's Center. It also conducts house and walking tours and the grounds are used for events.

Self-Sufficiency % (Financial Need): The request is approximately 47% of the Historic Bluffton Foundation's FY2025 projected budget for the Heyward House. Other revenue sources include a SC Parks Grant for the Capital Improvements, Beaufort County ATAX funds, donations, rental income and revenues from their tours and programs.

Previous Funding Amounts						
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
2024	\$150,000	53%	\$150,000	\$150,000	\$64,079	Expenses through September 2023; Reporting from October 2023 - April 2024 not yet submitted
2023	\$175,000	82%	\$175,000	\$175,000	\$158,298	
2022	\$190,000	84%	\$190,000	\$190,000	\$117,51	

Accommodations Tax Committee Recommendations and Comments:

The Committee recommends funding \$40,000 for visitors center services.