

**Milroy, Shannon**

**From:** noreply@civicplus.com  
**Sent:** Monday, April 1, 2024 5:03 PM  
**To:** ATax Communications  
**Subject:** Online Form Submittal: Accommodations Tax Grant Application

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## Accommodations Tax Grant Application

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**
**TOWN OF BLUFFTON ACCOMMODATIONS TAX  
GRANT APPLICATION**

Accommodations Tax Grant Application Instructions	<a href="#">Accommodations Tax Grant Application Instructions</a>
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Accommodations Tax Grant Application Instructions	I have read and acknowledged the Town of Bluffton, SC Accommodations Tax Grant Application Instructions.
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Application Date	4/1/2024
Full Legal Organization Name	Historic Bluffton Foundation
Project Name	Luke Peeples Music Celebration
Total Project Costs	13200
Total ATAX Funds Requested	5000
Percent of Total Budget	37%
Address	70 Boundary St.

Street Address Line 2	PO Box 742
City	Bluffton
State	SC
Zip Code	29910

Applicant must be designated as a non-profit entity to receive ATAX funds. Please include a copy of your organization's non-profit status, such as your IRS Designation Letter.

[HBF-IRS.pdf](#)

Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants.

[2024-03-26\\_business-license-HHC.pdf](#)

## **TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

### Organization Primary Point of Contact

First Name	Robert
Last Name	Jones Jr
Title	Executive Director
Phone Number	8437576293
E-mail Address	<a href="mailto:robert@historicbluffton.org">robert@historicbluffton.org</a>

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### Organization Secondary Point of Contact

First Name	Jen
Last Name	Sommerville
Title	President
Phone Number	7602777716

E-mail Address [Jen@dhabney.com](mailto:Jen@dhabney.com)

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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**Project Description:**

**Luke Peeples Music Revival Concert:**

The Luke Peeples Music Revival Concert is a community-driven initiative aimed at preserving and celebrating the musical legacy of Luke Peeples, a cherished figure in Bluffton's cultural history. Born in Bluffton in 1906, Luke Peeples was not only a talented musician, poet, and composer but also a passionate advocate for the vibrant Gullah culture that shaped our community.

At its core, this project seeks to honor Luke Peeples' enduring impact on Bluffton by rejuvenating his musical repertoire and sharing it with current and future generations. Through this concert, we aim to raise awareness of Luke Peeples' contributions to Bluffton's cultural heritage and foster a deeper appreciation for Gullah music and traditions.

The Luke Peeples Music Revival Concert will feature performances of Luke Peeples' original compositions, as well as traditional Gullah music, at the historic Campbell AME Church in Bluffton. This concert will showcase the soulful melodies and vibrant rhythms of Luke Peeples' music, paying tribute to his life and legacy.

As we embark on this endeavor, we are in the process of seeking sponsors to help cover the expenses associated with this event. Our intention is to keep ticket prices down to make the concert more inclusive and accessible to all members of the community. We believe that by securing sponsors, we can ensure that everyone has the opportunity to experience and appreciate the cultural significance of Luke Peeples' music.

Following the concert, there are plans for a reception at the Heyward House, where attendees can gather to celebrate the music of Luke Peeples and engage in conversations about his cultural significance. We are actively seeking sponsors to support the majority of this programs expenses, and their contributions will make it possible to honor Luke Peeples' musical legacy and enrich our community through music, culture, and heritage.

We are seeking funding from the local Accommodations Tax (ATAX) to support the remaining expenses associated with the Luke Peeples Music Revival Concert. With your support, we

can ensure the success of this important initiative and continue to preserve and celebrate the cultural heritage of Bluffton.

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

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**Impact on or Benefit to Tourism:**

The Luke Peeples Music Revival Concert has the potential to have a significant impact on tourism in Bluffton, South Carolina. As a town deeply rooted in Gullah culture and known for its vibrant arts scene, Bluffton attracts visitors from near and far who are eager to experience its unique cultural heritage.

By hosting a concert that celebrates the musical legacy of Luke Peeples, a beloved figure in Bluffton's history, we aim to enhance the cultural offerings of our town and attract even more tourists to the area.

Bluffton has long been recognized as a destination for cultural tourism, with its picturesque landscapes, charming historic district, and rich Gullah heritage drawing visitors seeking authentic cultural experiences.

The Luke Peeples Music Revival Concert will further bolster Bluffton's reputation as a cultural hub by showcasing the soulful melodies and vibrant rhythms of Gullah music, a distinctive genre that has deep roots in the Lowcountry region.

Tourists visiting Bluffton for the Luke Peeples Music Revival Concert will have the opportunity to immerse themselves in the rich cultural heritage of the area and gain a deeper understanding of the contributions that Luke Peeples made to the town's musical legacy. By attending the concert and participating in the reception at the Heyward House, visitors will not only enjoy a memorable cultural experience but also support local businesses and contribute to the economic vitality of Bluffton.

Furthermore, the Luke Peeples Music Revival Concert has the potential to attract new visitors to Bluffton who may be drawn to the town's cultural offerings. As word spreads about the concert and its celebration of Gullah music and heritage, we anticipate an increase in tourism to Bluffton, with visitors coming from

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neighboring towns and cities as well as from farther afield. This influx of tourists will not only benefit local businesses, hotels, and restaurants but also contribute to the overall growth and prosperity of Bluffton's tourism industry.

In conclusion, the Luke Peeples Music Revival Concert will have a positive impact on tourism in Bluffton by enhancing the town's cultural offerings, attracting visitors interested in experiencing its unique heritage, and stimulating economic activity in the area. By celebrating the musical legacy of Luke Peeples and showcasing the rich cultural heritage of Bluffton, we hope to inspire visitors to explore all that our town has to offer and leave with a deeper appreciation for its history and traditions.

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**“Tourist” means a person who does not reside within the corporate limits of the Town or within a Town zip code that takes a trip into the corporate limits of the Town for any purpose, except daily commuting to and from work.**

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

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Project/Event Start & End Date:	10/25/2024 - 10/26/2024
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Multi-Year Project/Event?	No
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Permits Required, if any:	None
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Additional Comments:	<i>Field not completed.</i>
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## **TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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### **FINANCIAL INFORMATION**

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Project/Event Line Item Budget	<a href="#">2024-03-31-budget-Luke-Peebles-celebration.pdf</a>
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Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement	<a href="#">Historic Bluffton Foundation June 2023 Profit and Loss Report.pdf</a>
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Financial Guarantee

[Draft budget for ATAX submittal.pdf](#)

*Applicant must provide a copy of official minutes wherein the sponsoring organization approves the project and commits the organization to financial responsibility for carrying it out to the stage of completion.*

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

Contribution	Sponsor donations
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Amount/Value	5500
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Contribution	Ticket sales
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Amount/Value	2000
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Have you requested, received or been awarded funding from other sources or organizations (including additional ATAX funds from other local entities) for this project/event?	No
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If yes, please list all sources and amounts:

## **TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

### **PRIOR RECIPIENT'S REPORT**

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information. Only the information for the most recent round of funding is required.

If you have not received ATAX funding from the Town of Bluffton, please answer "No" and skip this section, and sign and submit your application.

Has your organization previously received ATAX funds from the Town of Bluffton?	Yes
Project/Event Name	Heyward House Museum and Welcome Center
Year	2024
Amount Awarded	150000
Was project completed?	No
If project was not completed, please explain:	Project ends June 31, 2024.
How were the funds used?	<p>During the previous grant period, the Historic Bluffton Foundation effectively utilized the \$150,000 grant to support the operations and programming of both the Heyward House Museum and Welcome Center, as well as the Garvin-Garvey House. Through careful planning and strategic allocation, we directed the funds towards various initiatives aimed at enhancing community engagement, historical preservation, and visitor experiences at these vital cultural destinations. The grant played a crucial role in opening and operating the Garvin-Garvey House, allowing visitors to explore another historical landmark in Bluffton. Funds were used to support staffing and operational expenses necessary for its daily operations. Additionally, the grant supported efforts to enrich visitor experiences at both the Heyward House Museum and Welcome Center and the Garvin-Garvey House. These efforts included guided tours, interactive exhibits, and special events that provided visitors with immersive insights into the unique history and heritage of Bluffton. Furthermore, funds were used for marketing efforts to promote both locations, raising awareness of their offerings and attracting visitors to explore the rich cultural offerings available in Bluffton. A portion of the grant also supported administrative and operational expenses, ensuring the smooth functioning of both locations. This included staffing costs, facility maintenance, and other essential operational expenses necessary to sustain the museums' operations and preserve their historical significance. Overall, the grant empowered the Historic Bluffton</p>

Foundation to continue its vital work in preserving the rich heritage of Bluffton through the operation of the Heyward House Museum and Welcome Center, while also providing engaging experiences for visitors to enjoy at the Garvin-Garvey House.

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

During the previous period, we recorded over 20,000 visitors across both locations, with approximately 17,000 visiting the Heyward House and around 3,000 visiting the Garvin-Garvey House. This substantial engagement underscores the significant interest in our cultural offerings and highlights the cultural appeal of these historic landmarks. The influx of visitors not only contributes to the local economy by supporting small businesses, restaurants, and other enterprises in the area but also fosters a sense of community pride as residents witness the appreciation and interest in the town's rich history and heritage. Furthermore, increased tourism helps to raise the profile of Bluffton as a destination, attracting visitors from near and far and positioning the town as a cultural hub within the region. This heightened visibility can lead to positive economic outcomes, including job creation and investment opportunities, as well as enhanced cultural exchange and collaboration. Moreover, the engagement of visitors with the cultural programming and interpretive experiences offered at both locations enriches the fabric of the community by fostering a deeper understanding and appreciation of Bluffton's history and identity. Despite the challenging economic climate, the Heyward House Museum and the Garvin-Garvey House experienced a strong year, contributing positively to the local economy. This resilience is a testament to the enduring appeal of Bluffton's rich history and heritage, which continues to attract visitors from near and far. Data on visitor numbers and demographics is captured through guest sign-in logbooks at both the Heyward House and the Garvin-Garvey House, and statistics are compiled on a monthly basis. Additionally, valuable insights are gathered through direct engagement with tourists during their visits, including conversations and feedback, which help assess their experiences and perceptions. Overall, the Heyward House Museum and the Garvin-Garvey House had a strong year, enriching the community of Bluffton in numerous ways and positioning it as a destination of choice for cultural exploration and heritage tourism.

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Please provide the project/event budgets

[HBF Budget with breakout 2022-23.png](#)



for the previous two (2)  
years.

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Additional Comments      *Field not completed.*

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## **TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

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

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

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

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Signature                      Robert S Jones Jr

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Signatory's Title or              Executive Director, HBF  
Position

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**Internal Revenue Service  
District Director**

**Department of the Treasury**

Date: **DEC 15 1983**

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

**Our Letter Dated:  
February 24, 1982**

**Person to Contact:  
William Anderson/jdf**

**Contact Telephone Number:  
(404) 221-4516**

**Employer Identification Number:  
57-0724129**

**File Folder Number:  
580015849**

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

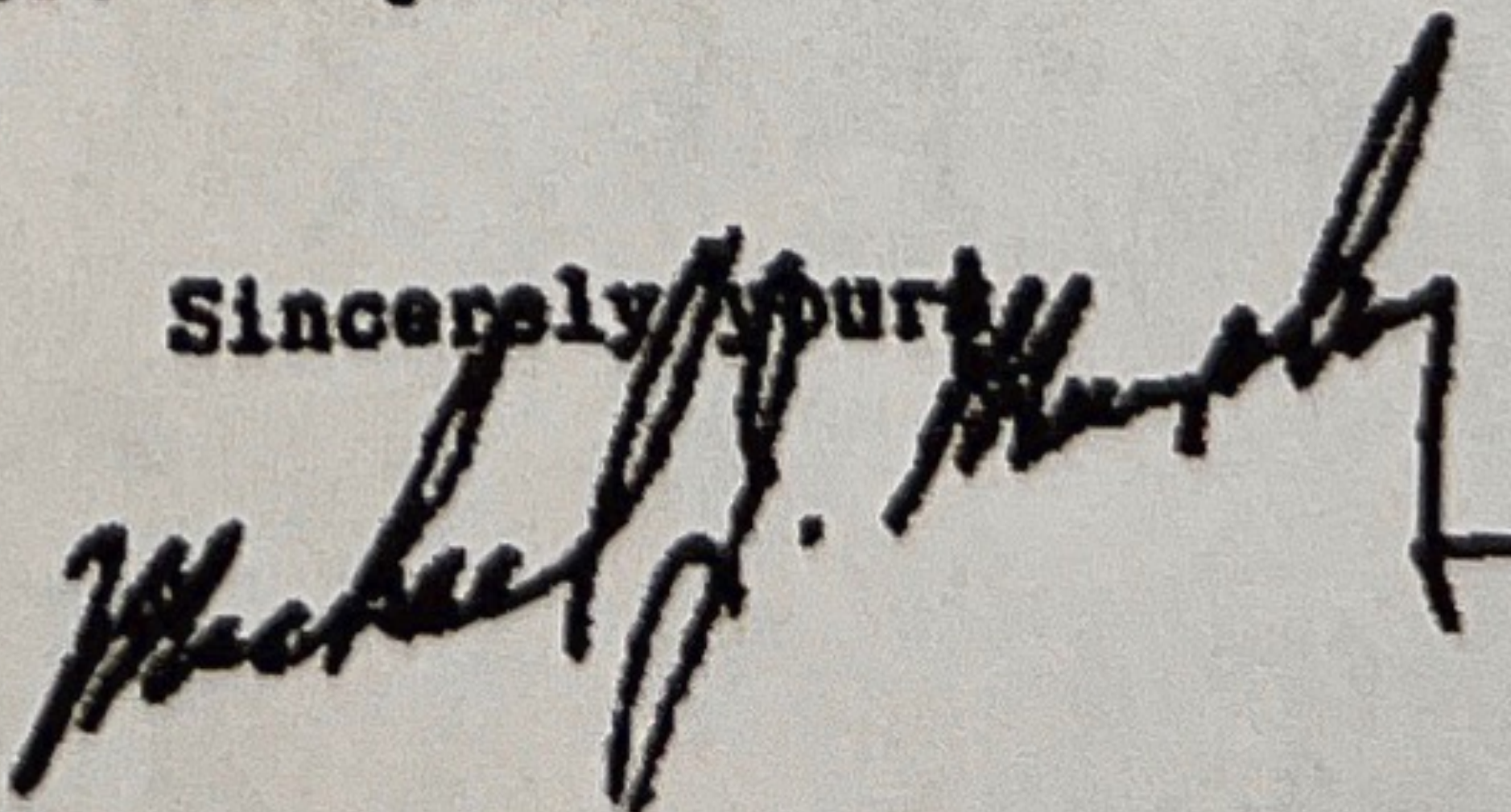
Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section \_\_\_\_\_. Your exempt status under section 501(c)(3) of the code is still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

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

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

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

Sincerely yours,



**District Director**

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



# TOWN OF BLUFFTON

September 25, 2023

DATE ISSUED

April 30, 2024

EXPIRES

LIC-09-23-052115

LICENSE NUMBER

8499

BUSINESS ID

**Bluffton Historic Preservation Society, Inc.**

COMPANY NAME

**Heyward House Museum and Welcome Center**

DBA NAME

**Non Profit - Museums**

BUSINESS TYPE

**BLUFFTON WELCOME CENTER**

DESCRIPTION/CONDITIONS

70 BOUNDARY ST

BLUFFTON SC 29910-

BUSINESS LOCATION

PO Box 742

Bluffton SC 29910-

MAILING LOCATION

Attachment 12

HBF Celebration of the Music of Luke Peeples

Expenses	
Artist contract Marlena Smalls	\$4000.00
Accommodation	\$700.00
Printed music and corsages for 35 singers	\$600.00
Keepsake Programs	\$1000.00
Publicity (poster design and printing, invitation postcards)	\$1000.00
Audio-Visual Support	\$1200.00
Misc.	\$2000.00
Reception	\$2700.00
Total	\$13200.00
Income	
Sponsorships/Donations	\$5500.00
In-kind donations	\$700.00
ATAx	\$5000.00
Ticket sales/poster sales	\$2000.00
Total	\$13200.00

# Historic Bluffton Foundation, Inc.

## Profit & Loss

Accrual Basis

July 2022 through June 2023

	Jul '22 - Jun 23
<b>Ordinary Income/Expense</b>	
<b>Income</b>	
Restrict Grant Parks Tourism	500,000.00
Interest Income, PTR Grant	6,441.19
Specified Donation Account	5,128.75
Rental Income - Teel House	17,600.00
Archives	265.00
Donations	34,363.51
Gift Shop Income	10,457.65
Grant Income Private Foundation	52,075.00
ATAx Town of Bluffton	158,543.75
Interest Income, MM Account	1,259.25
Membership	3,100.00
Rental Income	8,087.50
Special Events	16,606.14
Tours/Program Income	16,800.10
<b>Total Income</b>	<b>830,727.84</b>
<b>Expense</b>	
Depreciation Expense	5,906.07
Capital Projects Expense	58,009.40
Archives expenses	648.00
Bank Service Charges	1,347.21
Bank Service Charges - PSB TOWN	66.00
Cleaning	450.00
Computer Software/Upgrades	1,733.68
Dues and Subscriptions	2,101.16
Gift Shop Expense	6,840.07
Insurance	20,365.02
Interest Expense	2,621.56
Landscape Expense	6,190.00
Marketing - Operational Exp.	5,402.37
Miscellaneous	0.00
Office Supplies	1,909.99
Payroll Tax Expense	6,821.52
Pest Control	1,099.89
Postage and Delivery	254.73
Professional Development	131.58
Professional Fees	10,700.00
Property Tax Expense	461.72
Repairs and Maintenance	11,581.70
Salaries & Wages	99,921.88
Special Events Expenses	12,376.77
Utilities	13,823.64
Website Expense	1,068.39
<b>Total Expense</b>	<b>271,832.35</b>
<b>Net Ordinary Income</b>	<b>558,895.49</b>
<b>Other Income/Expense</b>	
Other Expense	
Loss on Asset Disposal	2,081.64
<b>Total Other Expense</b>	<b>2,081.64</b>

## Historic Bluffton Foundation, Inc.

**Profit & Loss**

Accrual Basis

July 2022 through June 2023

	Jul '22 - Jun 23
Net Other Income	-2,081.64
Net Income	<b>556,813.85</b>



**Robert Jones** <robert@historicbluffton.org>

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**Luke Peeple's event budget**

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**Jen Sommerville** <jen@dhabney.com>

Mon, Apr 1 at 4:37 PM

To: Robert Jones <robert@historicbluffton.org>

Robert,

I have received a majority vote from board members to approve the Luke Peeple's event budget. Please include this budget in our application.

Thank you,

Jen Sommerville  
Board Chair

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2022-23 Budget				
Welcome				
	Total	Center	BHPS	
	Budget	Only	Only	
	Budget	Budget	Budget	
<b>Revenues</b>				
Grants				
Private Foundations	5,000		5,000	
Town of Bluffton ATAX	175,000	175,000		74%
Beaufort County ATAX	20,000	20,000	-	9%
Total Grant Income	200,000	195,000	5,000	
Sales and Service Revenues				
Gift Shop	2,000	500	1,500	25%
Memberships	2,000		2,000	
Tours/Programs	15,000	12,000	3,000	75%
Special Events	10,000	8,000	2,000	80.0%
Total Sales & Service	29,000	20,500	8,500	
Other Revenues				
Colcock-Teel Endowment	10,000		10,000	
Archival Income	500		500	
Donations	4,000	1,000	3,000	33%
Rental Income/Common Ground/Caretaker	36,600	17,000	19,600	46%
Total Miscellaneous	51,100	18,000	33,100	
<b>Total Revenues</b>	<b>280,100</b>	<b>233,500</b>	<b>46,600</b>	<b>84%</b>
<b>Expenditures and Other Uses</b>				
Salaries & Benefits	150,000	130,000	20,000	0.86
Mortgage (retired in 2021)	-	-	-	
Interest Expenses	1,000	500	500	0.50
Archives	1,750	450	1,300	0.26
Bank Fees	1,800	1,400	400	0.77
Insurance	15,000	12,000	3,000	0.80
Utilities	18,000	17,000	1,000	0.94
Gift Shop Expenses	1,000	800	200	0.80
Special Events	2,500	1,500	1,000	0.33
Programs	3,550	1,500	2,050	0.58
Advertising and Marketing	7,000	6,500	500	0.92
Shipping/Postage	1,300	1,100	200	0.84
Dues & Subscriptions	2,500	2,000	500	0.80
Office Supplies	2,000	1,750	250	0.87
Equipment Upgrades	5,000	3,000	2,000	0.60
Professional Development	1,000	200	800	0.20
Contract Services				
Accounting	15,000	13,000	2,000	0.86
Cleaning Services	2,000	1,800	200	0.90
Consulting Services	500		500	
Landscaping	1,500	1,000	500	0.66
Pest Control	1,000	750	250	0.75
Repairs/Maintenance	15,000	11,000	4,000	0.73
Security	500	250	250	0.50
Website	1,200	1,000	200	0.83
Capital Improvements	30,000	25,000	5,000	0.83
<b>Total Expenditures and Other Uses</b>	<b>280,100</b>	<b>233,500</b>	<b>46,600</b>	<b>84%</b>
<b>Revenues Over/(Under)</b>	<b>- 0</b>	<b>- 0</b>	<b>- 0</b>	<b>- 0</b>