

Milroy, Shannon

From: noreply@civicplus.com
Sent: Monday, April 1, 2024 4:37 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

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Accommodations Tax Grant Application Instructions [Accommodations Tax Grant Application Instructions](#)

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

(Section Break)

Application Date 3/30/2024

Full Legal Organization Name Historic Bluffton Foundation

Project Name Heyward House Museum and Welcome Center

Total Project Costs @\$150,000 a quarter

Total ATAX Funds Requested \$40,000 for Q1 of F25

Percent of Total Budget 26%

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 HBF
Phone Number	8437576293
E-mail Address	robert@historicbluffton.org

(Section Break)

Organization Secondary Point of Contact

First Name	Jen
Last Name	Sommerville
Title	President
Phone Number	7602777716

E-mail Address robert@historicbluffton.org

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description:

General Description:

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

Over the past year, the Foundation has made significant strides in advancing its vision as the foremost authority and advocate for historical preservation in Bluffton and southern Beaufort County. Building upon our legacy since the inception of the Heyward House Project in 1998, we continue to serve as local pioneers in recognizing the pivotal role of historic preservation in fostering a sustainable tourism industry. Our endeavors not only enrich the cultural fabric of our community but also stimulate economic growth by supporting local businesses and restaurants.

Through the generous support of grants such as the Bluffton ATAX, we have been able to sustain and enhance the operations of the Heyward House as Bluffton's premier Welcome Center. These funds have been instrumental in covering various expenses, including personnel salaries and benefits, utilities, maintenance, marketing initiatives, and visitor outreach programs.

Since its inception in 2000, the Heyward House Museum has proudly held its place as a cornerstone attraction, inviting both visitors and residents alike to delve into the rich tapestry of the region's vibrant history and cultural heritage. This iconic building stands as a symbol of utmost importance to our town, resonating with a multitude of tangible and intangible significance. Beyond its physical structure, the Heyward House Museum serves as a focal point for community identity, connecting past and present generations through its compelling narrative.

In addition to our museum's cultural contributions, our grounds are actively utilized for events spilling over from Martin Family Park such as the Farmer's Market, further embedding ourselves in the community fabric. By supporting local vendors

and artisans at this weekly gathering, we not only celebrate the region's agricultural heritage but also foster economic growth and community cohesion. Furthermore, our ongoing efforts to champion local businesses, restaurants, and events extend far beyond mere promotion; they serve as integral components in fostering the economic vitality of Bluffton and its surrounding areas. By cultivating a vibrant cultural scene and fostering a sense of community pride, the Heyward House Museum plays a pivotal role in shaping the socio-economic landscape of our beloved town, ensuring a thriving future for generations to come.

As the designated Welcome Center for a quarter of a century, we take pride in showcasing the diverse offerings of Bluffton, including house and walking tours, culinary experiences, art galleries, and outdoor recreational activities. Our collaborative partnerships with local organizations have solidified the Heyward House Museum's reputation as the quintessential starting point for exploring the charm and allure of Bluffton and its environs.

Moreover, our commitment to transparency and accountability is evident through the thorough reporting and documentation of our financial activities, visitor statistics, and marketing endeavors. We ensure that our stakeholders are kept well-informed through detailed monthly reports and comprehensive financial records. The primary way to count visitors at the Heyward house and the Garvin Garvey House is by a guest book.

Through our marketing efforts, plus our partnerships with other local organizations, the Heyward House is known as "the place to start" when exploring the Town of Bluffton and surrounding area. Detailed monthly reports are submitted to the Finance Department along with financial records, invoices, receipts, social media reports, and visitor statistics.

In 2023/2023, the Heyward House Museum and Welcome Center served a total of 18,550 visitors. Of these visitors, 9,715 came for tours or information. From this total, we captured location information from 8,300 people, and 7,250 were non-locals, representing 87% of our impact visitors based on captured data. Rentals accounted for 48% of the total visits, with the remaining visitors staying at timeshares (18%), private residences (14%), and hotels (20%). The remaining visitors were categorized as "Other" for business, archives, events, and rentals. The number of visits last year and in recent months demonstrates a strong resurgence in tourism, even during

traditionally slower months like February and March.

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% discovered us through radio/TV or other means. Of the total visitors, 9,715 came for information and/or tours at the Heyward House, categorized as "Impact Visitors." The remaining visitors were considered "Other" and were for business, archives, events, and rentals.

Well-stocked Welcome Center racks are now housed both on the back porch and in the gift shop, with maps and brochures available 24/7. A knowledgeable attendant in the Heyward History Gift Shop greets guests, provides recommendations, and answers questions. Personal communication and engagement are fundamental when greeting visitors and providing welcome center services. We market the Heyward House Museum and Welcome Center at hotels throughout Beaufort County, with brochures placed in rack card stands or with concierges. They are also available at the airport, in all the SC Welcome Centers in South Carolina, the Gullah Geechee Museum, the Hilton Head-Bluffton Chamber of Commerce, Greater Bluffton Chamber of Commerce, Beaufort Regional Chamber of Commerce, Town of Bluffton, and other historic sites.

Our staff actively promotes group tours of the Heyward House, the Garvin-Garvey House, and Old Town Bluffton with hotels, timeshares, and tour companies, with monthly visits from Marriott and Spinnaker tour buses hopefully returning soon. Our volunteer base is beginning to grow again, with a growing number of volunteers in various project areas who have enlisted in the last 2 months. These volunteers serve as gardeners, docents, archivists, and other important roles, attending to the buildings, grounds, and visitors with passion, professionalism, and energy. We expect this list of volunteers to expand greatly over this year.

Looking ahead, we remain dedicated to preserving Bluffton's rich heritage and promoting its unique identity as a destination of choice for cultural enthusiasts and history aficionados. With continued support, we aspire to further elevate the Heyward House Museum as a beacon of historical preservation and community engagement that it is, in the heart of Bluffton.

Site Improvements

Capital Improvements The Foundation embarked on a series of

significant capital improvement projects at the Heyward House Museum starting in March of 2023, utilizing restricted funds from the South Carolina legislature grant, administered by the South Carolina Department of Parks, Recreation & Tourism (SC PRT). This funding facilitated essential enhancements, increasing the venue's utility for various events and activities, while also aiding in the ongoing preservation efforts of the site. The Foundation's board envisions these projects as pivotal steps toward achieving a degree of self-sufficiency, particularly as preparations are made for the anticipated relocation of the Welcome Center in January of 2025. To ensure long-term sustainability, the Foundation is formulating a comprehensive strategy that encompasses various initiatives, with event rentals serving as one central component.

Projects completed or this last fiscal year include:

Installation of a new fire pit, with permits obtained from the Town of Bluffton (TOB)
 Acquisition of outdoor patio furniture for the Common Grounds area, including seating around the fire pit
 -Repair or replacement of the HVAC system and dehumidifier at the Heyward House, including replacement of all ductwork
 -Screening off the underneath of the house from critters to prevent damage and ensure the preservation of the site
 -Restoration efforts for the Enslaved Persons Cabin, including painting, floor repair, interior lime wash, and preservative roof treatment
 -Replacement of the cedar shake roof on the summer kitchen (funded by the Beaufort County Grant)
 -Procurement of a large golf cart to enhance tours
 -Purchase of chairs, tables, and dance floor to as add-ons to our rental package

Ongoing future projects for fiscal 2025 and beyond, also supported by SC PRT grant funds, include:

-Partition wall project, where a 1970s panel wall between the dining room and hallway will be restored to its pre-1970s state, and a new built-in display case will be constructed, further enhancing the museum's exhibition capabilities and historical authenticity
 -Replacement of a new aggregate throughout the Common Grounds area
 -Repair of the Heyward House front porch
 -Interior painting on the first floor, including lead-based paint abatement
 -Addition of a new bathroom facility across from the current one

in the house

- Installation of a water feature in the front yard near the new sidewalk
- Major structural repairs to address identified issues and ensure the integrity and safety of historic structure, completed with the assistance of Bennett Preservation Engineering of Charleston, SC, the preeminent preservation structural engineering firm in the Southeast
- Exterior lighting upgrade to enhance safety and aesthetics of the site during evening events
- Planning and installation of a "living" fence at the rear of the property
- Establishment of a small service yard at the rear of the property

Moreover, the Foundation is planning to hire both a landscape architect and architect to develop a comprehensive design for the site, focusing on optimizing rentals for events and weddings. This includes repurposing the summer kitchen as a catering kitchen, redesigning the front of the house to accommodate changes resulting from the sidewalk project, and reconfiguring the pavilion to provide more covered space. At this critical juncture, the rental of the facility is essential to its survival, and these improvements will enhance its appeal and functionality, contributing to its long-term viability. The Foundation looks forward to implementing these plans and continuing to serve as a vital cultural and community hub in the town of Bluffton.

The Heyward House Museum and Welcome Center is diligently working to position itself as a premier event venue, catering to a variety of occasions, including weddings, corporate events, and private gatherings. Our marketing efforts are focused on showcasing the Heyward House as the ideal backdrop for unforgettable experiences, and we are actively promoting our venue on quintessential wedding sites like The Knot. By strategically advertising on platforms frequented by those seeking unique and historic settings for their special events, we are expanding our reach and attracting discerning clientele. Our commitment to promoting the Heyward House as a rental venue underscores our dedication to maximizing its potential as a versatile space for memorable occasions, and we are excited to continue these efforts to ensure its prominence as a sought-after destination for events in the Bluffton area.

Garvin Garvey Info:

A Memorandum of Agreement (MOA 2017-69) was established between the Town of Bluffton and the Historic Bluffton

Foundation, further expanding the foundation's services, including interpretative programming at the Garvin-Garvey House. Starting in October 2017, the Historic Bluffton Foundation began offering tours of the Garvin-Garvey House. During the fiscal years of 2018-2019, 1,335 guests visited, and in 2019-2020, 2,115 people visited. In the first 12 months open to the public from March 2023 to March 2024, the site welcomed 2,275 visitors, operating 15 hours a week.

The Foundation responsibilities include overseeing and administering the site, including training and scheduling interpreters. Currently, we have several part-time interpreters and a volunteer who greet guests, provide informative information about the site, and keep an eye out for any issues that need to be addressed by the Town regarding maintenance concerns. The facility's hours are currently Tuesdays, Thursdays, and Saturdays. Each interpreter undergoes personalized training by our head interpreter, Ross Patterson, and experienced docents from the Heyward House Museum.

Funding to support these initiatives is provided by the Town of Bluffton in the form of reimbursement. This marks the first full year of operation since the pandemic, signifying a significant milestone in our efforts to resume normal operations and welcome visitors back to the Garvin-Garvey House. Head interpreter at the Garvin-Garvey House, Ross Patterson, demonstrates exceptional skill in coordinating schedules to maintain operational hours. His dedication and expertise ensure smooth operations and a welcoming atmosphere for visitors. Additionally, the presence of trained interpreters and volunteers not only enhances the visitor experience but also plays a crucial role in protecting the site from vandalism, preserving its historical integrity for future generations.

Caldwell Archive: We are continuing our digitization project, which temporarily paused after the passing of our lead Mrs. Doreen Bauman. We are regrouping and picking this project up as we speak. This initiative holds significant importance, providing researchers, Town and Foundation staff with vital information crucial to the preservation and education efforts of our community. Without access to these records, local preservation work would remain challenging. Through the process of uploading documents and photographs with metadata, keywords, and tags, we are creating a searchable archival website, enhancing accessibility and usability for all stakeholders. Furthermore, we are expanding access to the archive by introducing additional hours for direct access. Access to our facility remains free of charge, and we extend

the privilege of historic preservation access to the Town of Bluffton, allowing them to utilize our documents without supervision, further strengthening our collaborative efforts in preserving Bluffton's rich heritage.

Arts/Cultural projects:

The Heyward House continues its tradition of hosting a diverse array of arts and cultural events throughout FY 2025.

Programming remains a cornerstone of the Foundation's mission, with an anticipated strong turnout for all scheduled functions.

-Monthly Living Historians: Beginning July 3, 2024, and continuing on the first Thursday of every month, the Heyward House will feature interactive living history presentations, offering visitors a captivating glimpse into the past.

-Celebration of Luke Peeples's Music and Life: In October 2025, the Heyward House will pay tribute to the musical legacy of Luke Peeples with a special event honoring his contributions to Bluffton's cultural heritage which will include a concert at Campbell AME and reception afterward.

-Shades of Secession: In November 2025, the Heyward House will collaborate with SCAR, the Southeastern Coalition of Authentic Reenactors, for a two-day living history program titled "Shades of Secession." This event will provide visitors with an immersive experience exploring the complexities of the Civil War era.

-Scottish Heritage Day II: January of 2025 we will hold the next addition of the widely popular Scottish Heritage days

-Fall Lecture Series: Fall 2025 will see the continuation of our popular lecture series, offering engaging discussions on various historical and cultural topics.

In addition to these upcoming events, the Heyward House has previously hosted successful arts and cultural gatherings in FY 2023/4:

-Bluffton Historic Preservation Symposium After-Party: Held on May 18, 2023, this event provided a vibrant celebration following the symposium, fostering networking and collaboration within the preservation community.

-Joe McGill and Herb Frazier Talk and Book Signing: On July 8, 2023, the Heyward House welcomed renowned authors Joe McGill and Herb Frazier for an enlightening discussion and book signing event, shedding light on the legacy of slavery and its impact on the region.

-Heyward House Living Historian Program: Featuring esteemed interpreters Steve Quick and Jackson Cannady, this ongoing program brings history to life through immersive

portrayals. The first installment took place on May 8, 2023, with future dates to be announced.

-Scottish Heritage Day: In January of 2024, the Heyward House hosted a vibrant Scottish Heritage day, celebrating the rich cultural traditions and contributions of the Scottish community to the Lowcountry's history.

-Big Hat Tea Socials: The Heyward House also organized two elegant Big Hat Tea Socials featuring a fashion show, providing attendees with a delightful blend of fashion and history.

-Spring Lecture Series Finale: After fielding several interesting lectures, the Foundation will conclude its spring lecture series on May 21st and 22nd, featuring Clay Rice, grandson of notable -Lowcountry Folk artist, Carew Rice. On May 21st, attendees can enjoy silhouette cuttings by Clay Rice at the Heyward House, followed by a talk and storytelling session by him on May 22nd.

Looking ahead, the Foundation remains committed to curating engaging and educational experiences that celebrate Bluffton's rich cultural heritage and foster community engagement.

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

Impact on or Benefit to
Tourism:

Impact on tourism:

The Heyward House Museum and Welcome Center plays a pivotal role in driving tourism and benefiting the local community of Bluffton. As the town's primary historical attraction, the Heyward House Museum and Welcome Center serves as a beacon for cultural enthusiasts and history aficionados, drawing visitors from near and far to explore the rich heritage of the region. In addition to offering informative tours and exhibits, the Heyward House actively promotes local businesses, restaurants, and events, thereby contributing to the economic vitality of Bluffton.

By showcasing the town's unique charm and historical significance, the Heyward House enhances the overall visitor experience, encouraging tourists to explore beyond commercial shops and engage with the authentic culture of the community.

Furthermore, as a small house museum, the Heyward House

holds significant cultural value for Bluffton, providing a sense of identity and pride for residents. In a town where commercial establishments dominate the landscape, the Heyward House stands as a symbol of heritage and tradition, offering a place for locals to connect with their history and preserve their collective memory. The Heyward House's impact on tourism extends beyond mere numbers; it fosters a sense of place and belonging for both visitors and residents alike.

Referring to the 2017 Museums as Economic Engines report, U.S. museums emerge as substantial contributors to the economy, bolstering over 726,000 jobs and fostering additional employment opportunities. Notably, for each job within a museum, two more positions arise elsewhere in the economy, showcasing a significant ripple effect. Furthermore, every dollar of museum revenue spurs \$2.20 in other sectors, culminating in a substantial \$50 billion contribution to the American gross domestic product. Adding to this, recent research underscores the economic impact of small house museums on local communities. The study, 'Economic Impact of Small House Museums on Local Communities,' conducted by Clemson University, accentuates their pivotal role in igniting economic growth, job creation, and support for local businesses. Investment in preservation and promotional endeavors safeguards our local heritage, fosters a sense of place, and fortifies the economic well-being of our community. The Foundation is acutely aware of its pivotal role in advancing these crucial objectives.

Despite economic challenges, museums like ours have demonstrated resilience, with a little over 17,000 visitors over the past 12 months, surpassing the previous year's numbers in what is a challenging economy. This underscores the enduring appeal and economic relevance of museums, even in challenging times.

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

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

(Section Break)

Project/Event Start & End Date: 7/1/2024 - 6/30/2025

Multi-Year Project/Event? Yes

Permits Required, if any: Yes (see below)

Additional Comments: For our upcoming projects throughout the year, including construction projects, we anticipate the need for various permits and are fully committed to ensuring compliance. Regarding the Welcome Center, as we do not have any special events planned, no permits are required. However, for non-Welcome Center events hosted by the Historic Bluffton Foundation, special event permits with the Town of Bluffton may be necessary. Rest assured, we will diligently coordinate with the Town of Bluffton, submit all required documentation, and obtain any necessary permits for these events. Additionally, for construction projects, we are mindful of the need for permits and are dedicated to adhering to regulatory requirements.

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

Project/Event Line Item Budget [Historic Bluffton Foundation Budget 2024 2025 .xlsx](#)

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement [Historic Bluffton Foundation June 2023 Profit and Loss Report.pdf](#)

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.

(Section Break)

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

Contribution	Monetary
Amount/Value	59,000
Contribution	0
Amount/Value	0

(Section Break)

Have you requested, received or been awarded funding from other sources or organizations (including additional ATAX funds from other local entities) for this project/event?	Yes
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If yes, please list all sources and amounts:

Funding Source	SC PRT
Amount	500000
Funding Source	TOB Preservation Fund
Amount	12075
Funding Source	<i>Field not completed.</i>
Amount	<i>Field not completed.</i>
Funding Source	<i>Field not completed.</i>
Amount	<i>Field not completed.</i>

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

PRIOR RECIPIENT'S REPORT

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

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

Has your organization previously received ATAX funds from the Town of Bluffton?	Yes
Project/Event Name	Heyward House Museum and Welcome Center
Year	2024
Amount Awarded	150000
Was project completed?	No
If project was not completed, please explain:	This project is annual going from July 1st to June 30th of 2024.
How were the funds used?	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 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.

(Section Break)

Please provide the [Copy of Approved Budget 2020-2021.xlsx](#) project/event budgets for the previous two (2) years.

Additional Comments *Field not completed.*

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

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

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

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

Signature Robert S Jones Jr

Signatory's Title or Position Executive Director, HBF

Email not displaying correctly? [View it in your browser.](#)

Internal Revenue Service
District Director

Department of the Treasury

Date: DEC 15 1983

Our Letter Dated:
February 24, 1987

Person to Contact:
William Anderson/jdf

Contact Telephone Number:
(404) 221-4516

Employer Identification Number:
57-0724129

File Folder Number:
580015849

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

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.

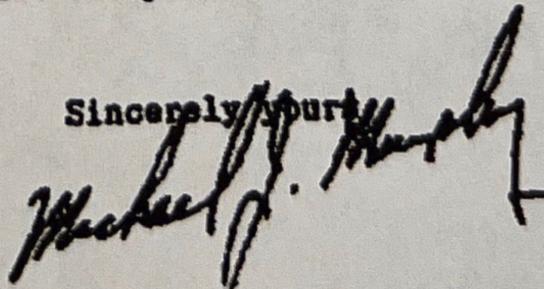
Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section ____*. Your exempt status under section 501(c)(3) of the code is still in 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 10

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

CIP Projects FY 2025

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

Heyward House Structural Repairs

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

Historic Bluffton Foundation, Inc.
Profit & Loss

Accrual Basis

July 2022 through June 2023

	Jul '22 - Jun 23
Ordinary Income/Expense	
Income	
Restrictive 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
Total Income	830,727.84
Expense	
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
Total Expense	271,832.35
Net Ordinary Income	558,895.49
Other Income/Expense	
Other Expense	
Loss on Asset Disposal	2,081.64
Total Other Expense	2,081.64

Historic Bluffton Foundation, Inc.
Profit & Loss

Accrual Basis

July 2022 through June 2023

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



Robert Jones <robert@historicbluffton.org>

Draft budget for ATAX submittal

Jen Sommerville <jen@dhabney.com>

Mon, Apr 1 at 4:34 PM

To: Robert Jones <robert@historicbluffton.org>

Robert,

I have received a majority vote from board members to approve the draft budget. Please include this budget in the submittal for our ATAX application.

Thank you,

Jen Sommerville
Board Chair

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Bluffton Historical Preservation Society
Approved Operational Budget with current year projections
Fiscal Year 2020-2021

	Approved 2020-2021 Budget		
	Welcome		
	Total Budget	Center Only Budget	BHPS Only Budget
Revenues			
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
Total Revenues	267,000	225,000	42,000
Expenditures and Other Uses			
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
Total Expenditures and Other Uses	267,000	225,000	42,000
Revenues Over/(Under) Expenditures	-	-	-