

ACCOMMODATIONS TAX ADVISORY COMMITTEE

STAFF REPORT

Department of Finance & Administration



MEETING DATE: May 19, 2026
 SUBJECT: HBF: FY2027 Heyward House Museum Operations
 PROJECT MANAGER: Jeremy Bullock, Grants Administrator

Summarized below is the application from the Historic Bluffton Foundation for Accommodations Tax grant dollars to operate and maintain the Heyward House Museum for Fiscal Year 2027 (July 1, 2026 - June 30, 2027).

Budget numbers provided herein are based on information conveyed on the required Line-Item Budget Form within the applicant's submission.

Total Budget: \$222,097
Requested Amount: \$50,000
Percentage of Request^: 22.5%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Budget per Category (based on Budget Form), corrected as needed	
Advertising & Promotion of Tourism or Arts and Cultural Events	\$-	
Facilities for Civic and Cultural Events	-	
Public Facilities	-	*
Municipality and County Services	-	*
Tourist Transportation	-	*
Operating Expenses	218,900**	
Other/Ineligible Project Expenses	499,663**	
Total	\$718,563	

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

Budgeted Expenses Summary:

Operating Expenses:

Total budget: \$218,900**

- Advertising, utilities, subscriptions, office & janitorial supplies, cleaning, pest control, landscaping, minor repairs, insurance, accounting/professional fees

Other/Ineligible Project Expenses:

Total budget: \$499,663**

- Personnel expenses, professional development, bank fees, rental/permit fees, archives expenses, capital improvements

Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exceptions Advertising 0-15 & Misc. 0-10)

Amount Requested	Advertising (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Miscellaneous (10)	Total of 40 possible	Comments
\$50,000	6	4	4	4	8	25	

Advertising: Of the total projected annual operating budget, \$58,300, or approximately 27%, is anticipated to be spent on advertising; this encompasses all local publications, social media, online wedding websites, Google, local newspapers, the Chamber of Commerce, email blasts, Statewide Welcome Centers, the Bluffton Vacation Planner, the HHI Vacation Planner, HHI Today and WTOC.

Tourism Draw %: Within a year’s time, the Heyward House Museum served approximately 37,000 visitors with 88% of those being tourists.

Benefit to Tourism: Rental rates are purposely kept low to attract out-of-town guests/destination weddings who then contribute to the local economy by spending on lodging, dining, and shopping; the museum also keeps on hand and distributes brochures and information about other local attractions.

Self-Sufficiency % (Financial Need): The request is approximately 7% of the Historic Bluffton Foundation’s FY2027 total projected budget for the Heyward House. Other revenue sources include donations, rentals, tours, fundraising events and in-kind contributions.

Previous Funding Amounts							
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Lapsed	Comments
2026	\$50,000	5%	\$50,000	\$50,000	-	n/a	Final Report not due until July 2026
2025	\$40,000	47%	\$40,000	\$20,000	\$20,000	-	January - March 2025 expenses; final report not yet due
2025	\$40,000	47%	\$40,000	\$40,000	\$40,000	-	October - December 2024 expenses; final report submitted
2025	\$40,000	47%	\$40,000	\$40,000	\$40,000	-	July - September 2024 expenses; final report submitted

Accommodations Tax Committee Recommendations and Comments:
none

The Committee recommends funding \$ 50,000 for FY2027 Heyward House Operations.

Bullock, Jeremy

From: noreply@civicplus.com
Sent: Tuesday, March 31, 2026 4:38 PM
To: ATax Communications
Subject: Online Form Submittal: Accommodations Tax Grant Application

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.

Accommodations Tax Grant Application

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

(Section Break)

Application Date 3/31/2026

Project Name Heyward House Museum

Project/Event Location 70 Boundary Street

Is this a new project or event? No

Project/Event Start Date: 7/1/2026

Project/Event End Date 6/30/2027

Multi-Year Project/Event? Yes

Total Project Costs	222097
Total ATAX Funds Requested	50000
Percent of Total Budget	22
Date the funds are needed:	7/1/2026
Full Legal Organization Name	Historic Bluffton Foundation
Address	70 Boundary Street
Street Address Line 2	<i>Field not completed.</i>
City	Bluffton
State	South Carolina
Zip Code	29910
Applicant must be designated as a non-profit entity to receive ATAX funds. Is your entity a non-profit organization?	Yes

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Organization Primary Point of Contact

First Name	Nicki
Last Name	Graziani
Title	Operations Manager
Phone Number	8437576293
E-mail Address	nicki@historicbluffton.org

(Section Break)

Organization Secondary Point of Contact

First Name	Jen
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Last Name	Sommerville
Title	Board Chair
Phone Number	7602777716
E-mail Address	jenhbf@gmail.com

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description: The Heyward House Museum is a vital part of Bluffton's history and economy. Built in 1841 and recognized on The National Register of Historic Places, it is the third-oldest surviving structure in Bluffton and the fourth oldest in southern Beaufort County. Its exceptional preservation of original architectural features, both inside and out, makes it the town's most important historic building. The property is unique in the Low Country for retaining its original slave dwelling, the only such structure in Beaufort County. Beginning in 2001, the Heyward House Museum plays a crucial role in driving the local economy by attracting out-of-town visitors and supporting local businesses. Despite recent increases in revenue, membership, and donations, the Heyward House, like many museums nationwide, requires additional funding to maintain operations.

In March 2023, the Heyward House began significant capital improvement projects, partially funded by a South Carolina legislature grant administered by the SC Department of Parks, Recreation, and Tourism (SC-PRT). These improvements include:

1. Restoration of the dining room wall

2. Structural repairs to the front porch
3. Installation of a new bathroom facility
4. Major structural repairs
5. Installation of a retractable awning for the gazebo

6. Mosquito prevention system

Still to do

1. Replacement of aggregate in common grounds
2. Interior painting and lead paint abatement
3. Exterior lighting upgrades

The museum has also hired a landscape architect to develop a comprehensive design that incorporates the new sidewalk along Boundary Street and optimizes the property for rentals, aiming to attract a broader and more discerning clientele. We have been working with the Town on the new hardscape of Boundary Street. We completed and submitted a plan to the town in February of 2026.

The Heyward House Museum supports the new Welcome Center reciprocating as a Wayfinding station. Our staff and volunteers direct visitors to the New Welcome Center along with co-hosting and collaborating events for the betterment of The Town of Bluffton. We continue to provide information, maps, and flyers for our local businesses, supporting cultural tourism and events. We require continued support from the Town of Bluffton's ATAX grants and other sources to maintain essential long-term success by persevering in a functional rich historic

landmark museum and promoting preservation.

List any required permits, if applicable. If none, type "N/A":

n/a

Describe all planned advertising and marketing for this project/event:

Our target demographic includes individuals searching online for Revolutionary and Civil War museums, event and wedding planners, group tours, and great Southern communities for vacation planning. We are now collaborating with The Post and Courier on a comprehensive rebranding effort to enhance our online presence. This initiative includes revamping our website functionality, nationwide digital marketing campaign, search engine optimization, curating engaging content, and building our presence on Yelp and other websites commonly used by potential vacationers planning their trips. We are also focusing our campaigns and involvement on a younger demographic.

Planned Advertising and Marketing Strategies:

1. Promote as a Wedding and Event Venue: Utilize social medi, Google, Email Marketing, Outreach events and community partnerships with local businesses and non-profits.
 2. Craft Compelling Newsletters: Develop engaging newsletters to keep audiences informed about events, offerings, and updates.
 3. Forge Strategic Partnerships: Cultivate alliances with local businesses, the town's Welcome Center, community organizations, and neighborhoods to expand reach and partner on public events organization that promotes Bluffton.
 4. Harness Digital Advertising: Leverage digital marketing strategies to target specific audiences effectively.
 5. Grow Membership: Focus on increasing membership through targeted campaigns, exclusive benefits, and targeting younger demographic.
 6. Utilize Data Analytics and Feedback Mechanisms: Implement tools to track performance metrics and gather feedback
-

for continuous improvement.
 7. Utilize other state and federal grants to support operations and grow our outreach ability.

Please list all media outlets you intend to utilize for your project/event (i.e. names of magazines, TV and radio stations, etc.):

- Google
- All local publications
- Facebook
- Island Packet
- Merchants society
- Sun City News
- Bluffton Today
- Chamber of Commerce - All
- Statewide welcome centers
- Mailing list emails
- Bluffton vacation Planner
- HHI Vacation Planner
- Welcome Centers across SC
- WTOC News Channel
- HHI Today Robin Zimmerman
- Zola wedding event rental platform
- Listed on Town of Bluffton Website
- Lowcountry Wedding Professionals Group
- Low Country Chronicle
- Post and Courier

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

Impact on or Benefit to Tourism:

In a year's time, the Heyward House served a total of approximately 37,000 visitors, with 88% coming from various countries and areas within the USA. The impact of these visitors is significant, as they not only engage with Bluffton's rich history but also spend time and money at local businesses, restaurants, and lodging establishments.
 The Heyward House Museum purposely keeps its rental rates low to bring in out-of-town guests as well as destination weddings, who in turn spend

money at local businesses and contribute to the Accommodation tax. We have been able to add additional offerings to our guests by adding a ready room for their use and have included trash hauling (instead of the renter having to do it themselves). The Heyward House Museum provides information as a Wayfaring station about local dining, shopping, and accommodations through brochures, knowledgeable gift shop attendants, docents, and a range of community partnerships which the Town's welcome center does not provide. These efforts continue to drive traffic to local businesses, fostering community pride and ensuring the ongoing economic vitality of Bluffton.

“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.

Additional Comments: *Field not completed.*

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

To download the Town’s required Line-Item Budget Form, click here:

<https://www.townofbluffton.sc.gov/DocumentCenter/View/4295/ATAX-Grant-Application-Line-Item-Budget-Form>

Download and save the form and hit "Back" in your web browser to return to the application. Once the form is completed, attach it on the following line.

Town’s required Line-Item Budget Form: [ATAX-Grant-Application-Line-Item-Budget-Form FY27.pdf](#)

Most Recent Fiscal Year [February 2026 Financial Reportsbalance.pdf](#)
Balance Sheet and
Profit and Loss
Accounting Statement

Financial Guarantee [HBF LH ATAX acceptance - JLS signed.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.

Please attach Budget [February 2026 Financial Reportsbalance 1.pdf](#)
vs. Actual statements
for prior two years
events.

Please attach Budget [June 2024 Financial Report operating.pdf](#)
vs. Actual statements
for prior two years
events.

(Section Break)

Have you requested, received, or been awarded ATAX funding from other state or local entities for this project/event? No

Have you received or been awarded ATAX funding from other state or local entities for any other project/event? No

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.

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
Year Awarded	2025
Amount Awarded	50,000.00
Was a final report submitted?	No
If no please explain why and indicate when the final report will be submitted.	Fiscal year has not ended. Will file in May 2026
What was the event's total attendance	32770
What was the total number of tourists?	29000
What was the percentage of tourists?	87
(Section Break)	
Please attach a copy of your organization's IRS Designation Letter showing your non-profit status .	HBF-BHPS IRS 1982 tax exempt determination letter.pdf.bz2
Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants.	Business License - 4_2024 - 4_2025.pdf
Additional Application Documents	<i>Field not completed.</i>
Additional Application Documents	<i>Field not completed.</i>

Additional Application Documents *Field not completed.*

Additional Application Documents *Field not completed.*

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 Nicki E Graziani

Signatory's Title or Position Operations manager

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



Internal Revenue Service
District Director

Department of the Treasury

Date: LG FEB 24 1982

Employer Identification Number:
57-0724129
Accounting Period Ending:
September 30
Foundation Status Classification:
509(a)(2)
Advance Ruling Period Ends:
September 30, 1983
Person to Contact:
151:3/ B. Zachery/ ds
Contact Telephone Number:
(404) 221-4516

The Bluffton Historical
Preservation Society Inc.
Boundary St. P. O. Box 114
Bluffton SC 29910

Oct. '81 -

FIN 580015849

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably be expected to be a publicly supported organization described in section 509(a)(2).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during an advance ruling period. This advance ruling period begins on the date of your inception and ends on the date shown above.

Within 90 days after the end of your advance ruling period, you must submit to us information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as a private foundation from the date of your inception for purposes of sections 507(d) and 4940.

Grantors and donors may rely on the determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you submit the required information within the 90 days, grantors and donors may continue to rely on the advance determination until the Service makes a final determination of your foundation status. However, if notice that you will no longer be treated as a section 509(a)(2) organization is published in the Internal Revenue Bulletin, grantors and donors may not rely on this determination after the date of such publication. Also, a grantor or donor 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 509(a)(2) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(2) organization.

275 Peachtree Street, N.E., Atlanta, GA 30043

(over)

Letter 1045(DO) (6-77)

0021 0002

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. Also, you should inform us of all changes in your name or address.

Generally, you are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. If you have paid FICA taxes without filing the waiver, you should call us. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions about excise, employment, or other Federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

You are required to file Form 990, Return of Organization Exempt from Income Tax, only if your gross receipts each year are normally more than \$10,000. If a return is required, it must be filed by the 15th day of the 5th month after the end of your annual accounting period. The law imposes a penalty of \$10 a day, up to a maximum of \$5,000, when a return is filed late, unless there is reasonable cause for the delay.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T. In this letter, we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,


District Director

Letter 1045(DO) (6-77)

0021 0003

TOWN OF BLUFFTON

TOWN OF BLUFFTON - Expires:04/30/2025

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

NAICS Title: Museums

Business Type:
BLUFFTON WELCOME CENTER

Business Name: Bluffton Historic
Preservation Society,
Inc

**Business DBA
Name:** Heyward House
Museum and
Welcome Center

Physical Address:
70 BOUNDARY ST
BLUFFTON SC 29910

NON-TRANSFERABLE | TO BE PLACED IN A CONSPICUOUS PLACE

Section 6-21 Purpose and Duration of Business License

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

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

**TOWN OF BLUFFTON
ACCOMODATIONS TAX GRANT APPLICATION BUDGET FORM**

*Round all numbers to the nearest whole dollar; do **not** use commas between numbers or ".00" at the end of a figure*

REVENUES

Revenues - Cash

	Sponsorships	\$	
	Donations	\$	104000
	ATAX Grants/Funding from Other Entities*	\$	
	<small>* Do NOT include anticipated award funds requested in this application</small>		
Other Grants (please name):		\$	
Other Grants (please name):		\$	
Other Grants (please name):		\$	
	Vendor Fees	\$	
	Registration Fees	\$	
Other Fees (please name):		\$	
Other Fees (please name):		\$	
	Merchandise Sales	\$	
Other Sales (please name):Rentals		\$	24200
Other Sales (please name):Tours		\$	13700
Other Revenue (please name):Fundraising Events		\$	54200
Other Revenue (please name):		\$	
Revenues - In-Kind Contributions			
	Volunteer Hours	\$	28000
	Donated Items	\$	2400
	Donated Services	\$	146000
Other (please name):		\$	
Other (please name):		\$	
Other (please name):		\$	
Total All Revenue Sources:		\$	196100

**TOWN OF BLUFFTON
ACCOMODATIONS TAX GRANT APPLICATION BUDGET FORM**

EXPENSES

Round all numbers to the nearest whole dollar; do not use commas between numbers or ".00" at the end of a figure

Eligible Tourism-Related Expense Categories (per SC Code of Laws)

	Amount
Advertising & Promotion of Tourism or Arts and Cultural Events	
Local Newspaper/Digital Advertising	\$ _____
Regional Newspaper/Digital Advertising	\$ _____
National Newspaper/Digital Advertising	\$ _____
Local Magazine/Digital Advertising	\$ _____
Regional Magazine/Digital Advertising	\$ _____
National Magazine/Digital Advertising	\$ _____
Local Radio Advertising	\$ _____
Regional Radio Advertising	\$ _____
National Radio Advertising	\$ _____
Local Television Advertising	\$ _____
Regional Television Advertising	\$ _____
National Television Advertising	\$ _____
Billboards	\$ _____
Social Media Advertising	\$ _____
E-mail and/or Text Blasts	\$ _____
Postcards/Mailers	\$ _____
Posters/Banners/Signage	\$ _____
Graphic Design of Marketing/Writing or Press Releases	\$ _____
Web Hosting for Event (not organization)	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Total Advertising/Promotion Budget:	\$ _____ 0
Facilities for Civic and Cultural Events	
Rentals: Venue(s)	\$ _____
Rentals: Parking Lots	\$ _____
Rentals: Tables, Chairs, Stages, Tents	\$ _____
Rental: Sound, Audio Equipment	\$ _____
Construction/Renovations/Repairs of Buildings/Facilities	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Total Facilities Budget:	\$ _____ 0

**TOWN OF BLUFFTON
ACCOMODATIONS TAX GRANT APPLICATION BUDGET FORM**

EXPENSES

Round all numbers to the nearest whole dollar; do not use commas between numbers or ".00" at the end of a figure

Eligible Tourism-Related Expense Categories (per SC Code of Laws)

	Amount
Tourist Transportation	
Company Name: _____	\$ _____
Company Name: _____	\$ _____
Total Transportation Budget:	\$ _____ 0
Public Facilities	
Temporary/Portable Restrooms	\$ _____
Dumpster Rental/Trash Hauling	\$ _____
Construction of Permanent Restrooms	\$ _____
Construction of Parks	\$ _____
Construction of Parking Lots	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Total Public Facilities Budget:	\$ _____ 0
Municipality and County Services	
Security Provided by Bluffton Police Department	\$ _____
Security NOT Provided by Bluffton Police Department	\$ _____
Total Municipality/County Services Budget:	\$ _____ 0
Operations <i>(only applicable to Visitor Centers and/or Cultural Centers/Museums)</i>	
Marketing/Advertising	\$ _____ 58300
Utilities <i>(electric, gas, water, phone service, internet, etc.)</i>	\$ _____ 10000
Subscriptions <i>(not related to marketing/advertising services)</i>	\$ _____ 3500
Supplies <i>(office, janitorial, etc.)</i>	\$ _____ 5000
Facility Maintenance <i>(i.e. cleaning, pest control, landscaping, etc.)</i>	\$ _____ 54000
Minor Repairs	\$ _____ 54300
Other (please name): _____	\$ _____
Other (please name): Insurance	\$ _____ 28400
Other (please name): Professional Fees/Accounting	\$ _____ 5400
Other (please name): _____	\$ _____
Total Operations Budget:	\$ _____ 218900
Total ALL ATAX Eligible Expenses:	\$ _____ 218900

Historic Bluffton Foundation
Balance Sheet
As of February 28, 2026

	Total
ASSETS	
Current Assets	
Bank Accounts	
Coastal States # 6767 Operating	12,978.47
Coastal States #2674 - MM	110,826.44
Coastal States #7294- Archives	1,402.42
Coastal States Investment Account #8721	166,819.25
Petty Cash	400.00
Total Bank Accounts	\$ 292,426.58
Other Current Assets	
Inventory	12,500.00
Promises to Give	293.16
Utility Deposits	300.00
Total Other Current Assets	\$ 13,093.16
Total Current Assets	\$ 305,519.74
Fixed Assets	
Accumulated Depreciation	-35,367.80
Computer Equipment	8,053.61
Computer Software	2,037.32
Furniture, Fixtures & Equipment	70,293.98
Property - Heyward House	300,000.00
Common Ground	75,128.58
Renovations - Heyward House	277,857.57
Total Property - Heyward House	\$ 652,986.15
Property - Teel House - Restricted	338,889.40
Vehicles - Golf Cart	12,595.00
Total Fixed Assets	\$ 1,049,487.66
Other Assets	
Amortizable Assets	8,000.00
Accumulated Amortization	-288.52
Total Amortizable Assets	\$ 7,711.48
Restricted Assets	
Total Temporarily Restricted	\$ 0.00
Total Restricted Assets	\$ 0.00
Total Other Assets	\$ 7,711.48
TOTAL ASSETS	\$ 1,362,718.88
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	1,748.77
Total Accounts Payable	\$ 1,748.77
Other Current Liabilities	
Payroll Liabilities	-979.32
Federal Taxes (941/943/944)	2,136.07
Federal Unemployment (940)	388.12
SC Income Tax	1,409.84
Total Payroll Liabilities	\$ 2,954.71

Total Other Current Liabilities	\$	2,954.71
Total Current Liabilities	\$	4,703.48
Long-Term Liabilities		
N/P SBA Loan		64,419.63
Total Long-Term Liabilities	\$	64,419.63
Total Liabilities	\$	69,123.11
Equity		
Net Assets		
Net Assets W/O Donor Restricti		871,540.30
Net Assets W Donnor Restriction		780,748.38
Total Net Assets	\$	1,652,288.68
Retained Earnings		-103,102.35
Total Temporarily Restricted Equity	\$	0.00
Net Income		-255,590.56
Total Equity	\$	1,293,595.77
TOTAL LIABILITIES AND EQUITY	\$	1,362,718.88



March 31, 2026

ATAX Application Review
Town of Bluffton
20 Bridge Street
Bluffton, SC 29910

Dear sir or madam,

The Board of Directors for the Historic Bluffton Foundation has reviewed the ATAX application dated 03/31/26 and approves the budget. Our organization approves the application and are committed to financial responsibility for carrying it out to the stage of completion.

Best regards,

A handwritten signature in black ink that reads "Jennifer Sommerville".

Jennifer Sommerville
Board Chair
Historic Bluffton Foundation

Historic Bluffton Foundation is a non-profit 501(C)(3) corporation

Historic Bluffton Foundation
Balance Sheet
As of February 28, 2026

	Total
ASSETS	
Current Assets	
Bank Accounts	
Coastal States # 6767 Operating	12,978.47
Coastal States #2674 - MM	110,826.44
Coastal States #7294- Archives	1,402.42
Coastal States Investment Account #8721	166,819.25
Petty Cash	400.00
Total Bank Accounts	\$ 292,426.58
Other Current Assets	
Inventory	12,500.00
Promises to Give	293.16
Utility Deposits	300.00
Total Other Current Assets	\$ 13,093.16
Total Current Assets	\$ 305,519.74
Fixed Assets	
Accumulated Depreciation	-35,367.80
Computer Equipment	8,053.61
Computer Software	2,037.32
Furniture, Fixtures & Equipment	70,293.98
Property - Heyward House	300,000.00
Common Ground	75,128.58
Renovations - Heyward House	277,857.57
Total Property - Heyward House	\$ 652,986.15
Property - Teel House - Restricted	338,889.40
Vehicles - Golf Cart	12,595.00
Total Fixed Assets	\$ 1,049,487.66
Other Assets	
Amortizable Assets	8,000.00
Accumulated Amortization	-288.52
Total Amortizable Assets	\$ 7,711.48
Restricted Assets	
Total Temporarily Restricted	\$ 0.00
Total Restricted Assets	\$ 0.00
Total Other Assets	\$ 7,711.48
TOTAL ASSETS	\$ 1,362,718.88
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	1,748.77
Total Accounts Payable	\$ 1,748.77
Other Current Liabilities	
Payroll Liabilities	-979.32
Federal Taxes (941/943/944)	2,136.07
Federal Unemployment (940)	388.12
SC Income Tax	1,409.84
Total Payroll Liabilities	\$ 2,954.71

Total Other Current Liabilities	\$	2,954.71
Total Current Liabilities	\$	4,703.48
Long-Term Liabilities		
N/P SBA Loan		64,419.63
Total Long-Term Liabilities	\$	64,419.63
Total Liabilities	\$	69,123.11
Equity		
Net Assets		
Net Assets W/O Donor Restricti		871,540.30
Net Assets W Donnor Restriction		780,748.38
Total Net Assets	\$	1,652,288.68
Retained Earnings		-103,102.35
Total Temporarily Restricted Equity	\$	0.00
Net Income		-255,590.56
Total Equity	\$	1,293,595.77
TOTAL LIABILITIES AND EQUITY	\$	1,362,718.88

Historic Bluffton Foundation Profit and Loss Previous Year Comparison For the Twelve Month Period Ending June, 2024 Operating Budget ATTACHMENT 07

Total Current Year Budget	<u>Current Month</u>				Variance	<u>Year to Date</u>			
	Prior Year Actual	Current Year Budget	Current Year Actual	Current Year Variance		Prior Year Actual	Current Year Budget	Current Year Actual	Current Year Variance
Revenues									
Archival Income	300		25		-25	265	300		-300
Specified Donation Account		129				5,129	0	2,649	2,649
Interest Income		1,542		1,521		7,700	0	21,592	
Donations	12,000	4,453	1,000	530	-470	34,364	12,000	32,921	20,921
Gift Shop	12,250	1,507	1,021	815	-206	10,458	12,250	14,764	2,514
Grants Private Foundations	5,000	12,075	417		-417	52,075	5,000		-5,000
Colcock-Teel Endowment	10,000		833		-833		10,000		-10,000
Bluffton A/H TAX	150,000	69,111	12,500	86,683	74,183	158,544	150,000	177,306	27,306
Beaufort County ATAX	10,000		833		-833		10,000		-10,000
Membership	20,000	950	1,667	10,750	9,083	3,100	20,000	40,050	20,050
Rental Income/Common Ground	12,000	650	1,000	2,525	1,525	8,088	12,000	24,581	12,581
Rental Income /Caretaker Income	21,600		1,800		-1,800		21,600		-21,600
Tours/Programs	14,500	1,184	1,208	1,548	340	16,800	14,500	17,652	3,152
Special Events	15,500	-295	1,292		-1,292	16,606	15,500	9,639	-5,861
Total Revenues	283,150	91,307	23,596	104,373	79,256	313,128	283,150	341,155	36,412
Expenses									
Archives			0	64	64	270	0	1,249	1,249
Bank Charges	1,800	185	150	1,429	1,279	1,413	1,800	4,864	3,064
Cleaning Service	2,000		167	200	33	450	2,000	2,400	400
Consulting Expense	1,500		125		-125		1,500		-1,500
Depreciation Expense		5,906				5,906			
Dues & Subscriptions	1,500	11	125	433	308	2,101	1,500	921	-579
Equipment Upgrades	5,000	-2,487	417		-417	1,734	5,000	2,985	-2,015
Gift Shop	8,000	1,609	667	360	-307	6,942	8,000	14,392	6,392
Interest Expense	2,500	2,622	208		-208	2,622	2,500		-2,500
Insurance	17,000	-1,871	1,417		-1,417	17,523	17,000	21,333	4,333
Landscaping	8,000	700	667	625	-42	5,190	8,000	18,214	10,214
Marketing	12,250	-709	1,021	3,297	2,276	5,402	12,250	23,290	11,040
Office Supplies	2,000	142	167	620	453	2,160	2,000	7,902	5,902
Pest Control	1,200		100		-100	1,100	1,200	4,492	3,292
Professional Develop	1,000		83	58	-25	132	1,000	58	-942
Pro. Fees/Accounting	15,500	325	1,292	2,469	1,177	10,700	15,500	33,871	18,371
Repairs/Maintenance	37,250	-9,592	3,104	2,775	-329	10,874	37,250	31,151	-6,099
Salaries & Taxes	130,000	14,031	10,833	15,792	4,959	106,960	130,000	162,862	32,862
Shipping/Postage	1,200		100	68	-32	255	1,200	509	-691
Special Events	12,000	2,534	1,000		-1,000	12,377	12,000	14,437	2,437
Security	250		21		-21		250		-250
Utilities	18,000	1,630	1,500	964	-536	13,686	18,000	15,842	-2,158
Website Expense	1,700	23	142		-142	1,156	1,700	676	-1,024
Misc. Program Exp.	3,500		292	3,781	3,490		3,500	8,396	4,896
Capital Improvements		2,343	0	3,723	3,723	58,009	0	12,823	12,823
Total Expenses	283,150	17,402	23,596	36,658	13,062	266,962	283,150	382,668	98,269
Net Income	0	73,905	0	67,715	66,194	46,166	0	-41,514	-61,856

Note: Negative numbers in expense accounts are due to journal entries by CPA at EOY.

interest on SC Parks money \$20660.82

includes fraud charge waiting on bank reimbursement \$1054.70
includes Stripe Membership Drive Fees \$211.30
Stripe month \$211.30 YTD \$507.93

includes engineering fees

NOTES:

This report is generated in the Excel Program. All numbers are rounded to the next \$1.00.

TOWN OF BLUFFTON ATAX GRANT APPLICATION SCORING SHEET

Entity: **Historic Bluffton Foundation**

Project: **FY2027 Heyward House Museum Operations**

Project Type:

Operations

Scoring Category	Points Possible	Points Awarded
ADVERTISING	15	
Part 1: Five (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 point	
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: Ten (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 (ex. Island Packet, The Bluffton Sun)	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 (ex. Charleston or Savannah news outlets)	6 points	
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (ex. Atlanta, Charlotte, Washington, D.C., Chicago)	8 points	
Nationally distributed newspapers/periodicals/electronic marketing (ex. USA Today, NY Times, Southern Living Magazine)	10 points	
TOURIST FACILITIES	15	
Higher point value given based on anticipated ratio of tourists to locals		
FESTIVAL/EVENT	5	
Higher point value given to requests for festivals or events		
Length of event/festival should be considered. Is it an all-day event versus a two-hour event? Multi-day event?		
BLUFFTON EVENT	5	
Higher point value given to events held within the town limits of Bluffton and/or spanning multiple locations		
TOURISM DRAW	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 point	
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 (LOCAL ECONOMY)	5	
Higher point value given to events that encourage overnight stays and/or have local business participation		
SELF SUFFICIENCY	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	10	
Only use if applicant does not qualify as a festival/event		
Group Average Point Total (out of a possible 40 points)		0
Group Average Percentage		