

Milroy, Shannon

From: noreply@civicplus.com
Sent: Monday, June 30, 2025 12:54 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	6/30/2025
------------------	-----------

Project Name	Fall Tour of Homes
--------------	--------------------

Project/Event Location	Heyward House Museum
------------------------	----------------------

Is this a new project or event?	Yes
---------------------------------	-----

If yes, did you or a team member discuss your application with town staff prior to applying?	Yes
--	-----

Project/Event Start Date:	10/4/2025
---------------------------	-----------

Project/Event End Date	10/4/2025
Multi-Year Project/Event?	No
Total Project Costs	16250
Total ATAX Funds Requested	6500
Percent of Total Budget	30%
Date the funds are needed:	9/1/2025
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 ext 2
E-mail Address	nicki@historicbluffton.org

(Section Break)

Organization Secondary Point of Contact

First Name	Field not completed.
------------	----------------------

Last Name	Field not completed.
-----------	----------------------

Title	Field not completed.
-------	----------------------

Phone Number	Field not completed.
--------------	----------------------

E-mail Address	Field not completed.
----------------	----------------------

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description:	<p>The Tour of Homes celebrates Bluffton's unique heritage and Southern charm, but also supports preservation efforts and educational programming at the Heyward House Museum. It's a wonderful opportunity for locals to deepen their appreciation for the town's rich history, and for visitors to experience Bluffton's welcoming community and timeless beauty.</p>
----------------------	---

Whether you're a history enthusiast, architecture lover, or simply looking to explore something special, this tour is a meaningful way to connect with the heart of Bluffton.

Homes on tour

The Mercer House

The Hancock - Long Cottage

The Huger House

The Rate

The Post Office

35 Bridge Street

The Bluff

114 Pritchard Street

The Heyward House

Visitors will begin the tour at the Heyward House to check in and get maps to the properties on tour. At each house, there will be a docent ready to take groups on tours. On Heyward House common grounds will be vendors for food and drinks.

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

Describe all planned advertising and marketing for this project/event:	<p>The tour will be a fundraiser for the Heyward House. We will start a digital marketing campaign with Triad Media, promote on our website, facebook and instagram. We will publish ads with the Chamber to involve our local community. The digital ads will be targeted at Savannah, Beaufort, Hilton Head, greater South Carolina, and Georgia. We will do print ads with local</p>
--	---

publications and flyers for distribution around town. Digital marketing gets a lot of traction so our advertising will focus on that outreach.

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 State wide welcome centers Mailing list emails
--	---

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:

The Tour of Homes is more than a showcase of beautiful houses—it's a celebration of Bluffton's unique identity. For tourists, it offers an immersive, one-of-a-kind experience that goes far beyond what a typical visit provides. By gaining access to private residences and meeting local homeowners and historians, visitors get a deeper, more personal understanding of the town's history and lifestyle. This creates lasting impressions and encourages return visits, positive word-of-mouth, and extended stays in the area.

Economic and Cultural Impact

Events like this stimulate the local economy by increasing foot traffic to shops, restaurants, galleries, and lodging. Many visitors plan entire weekends around the tour, exploring the Old Town district, dining locally, and engaging with other Bluffton attractions. This synergy strengthens Bluffton's reputation as a cultural and historic destination, contributing to sustainable tourism growth.

Proceeds from the Tour directly support the Heyward House Museum's mission: to preserve Bluffton's historic assets and educate the public through tours, exhibits, and outreach programs. By participating, both locals and tourists play an

active role in protecting the town's character for future generations.

We anticipate that the Tour of Homes will attract approximately 300 attendees, with a significant portion being out-of-town visitors. Based on the success of similar home tours in nearby cities like Savannah, Beaufort, and Charleston, we estimate that at least 60% of ticket sales will come from tourists traveling from outside the Bluffton area. This projection is also supported by the high interest in historic tours and cultural events in the region, which often draw tourists who are already visiting the Lowcountry or planning trips to heritage destinations.

To accurately assess the tourism impact, we will use our Clover credit card processing

service and Eventbrite to collect the zip codes of ticket buyers.

This data will allow us to analyze the geographic distribution of attendees and differentiate between local residents and visitors from outside the area. By analyzing the percentage of ticket sales from non- local zip codes, we can determine how many tourists were generated by the event and calculate the economic impact of their spending on accommodations, dining, and other local businesses. This methodology will provide concrete data to measure the

success of the event in drawing tourists and will serve as a benchmark for future iterations of the Tour of Homes.

“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: [TOH Application-Line-Item-Budget-Form.pdf](#)

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement [Historic Bluffton Foundation April 2024 YTD Balance Sheet \(1\).pdf](#)

Financial Guarantee [Untitled document \(2\).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)

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	2026
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 just started
What was the event's total attendance	n/a
What was the total number of tourists?	n/a
What was the percentage of tourists?	n/a
(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

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

Oct. '81 -

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/ R. Zachery/ ds
Contact Telephone Number:
(404) 221-4516

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 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

Sponsorships	\$	5000
--------------	----	------

Donations \$ _____

ATAX Grants/Funding from Other Entities*	\$
--	----

Other Grants (please name): \$

Vendor Fees \$

Registration Fees	\$	16250
-------------------	----	-------

Other Fees (please name):	\$
---------------------------	----

Other Fees (please name): \$

Merchandise Sales \$

Other Sales (please name):	\$
----------------------------	----

Other Sales (please name):	\$
----------------------------	----

Other Revenue (please name): \$

Other Revenue (please name):	\$
------------------------------	----

Volunteer Hours \$

Donated Items	\$
---------------	----

Donated Services	\$
------------------	----

Other (please name): \$

Other (please name):	\$
----------------------	----

Other (please name):	\$
----------------------	----

Total All Revenue Sources: \$ 21250

TOWN OF BLUFFTON
ACCOMODATIONS TAX GRANT APPLICATION BUDGET

EXPENSES

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

Amount

Advertising & Promotion of Tourism or Arts and Cultural Events

Local Newspaper/Digital Advertising	\$	300
Regional Newspaper/Digital Advertising	\$	600
National Newspaper/Digital Advertising	\$	100
Local Magazine/Digital Advertising	\$	300
Regional Magazine/Digital Advertising	\$	600
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	\$	600
E-mail and/or Text Blasts	\$	100
Postcards/Mailers	\$	250
Posters/Banners/Signage	\$	1500
Graphic Design of Marketing/Writing or Press Releases	\$	
Web Hosting for Event (not organization)	\$	150
Other (please name):	\$	
Other (please name):	\$	
Other (please name):	\$	
Other (please name):	\$	
Other (please name):	\$	

Facilities for Civic and Cultural Events

Rentals: Tables, Chairs, Stages, Tents	\$	3500
Rental: Sound, Audio Equipment	\$	
Construction	\$	
Repairs to Facilities	\$	
Maintenance of Facilities	\$	
Other (please name):	\$	
Other (please name):	\$	
Other (please name):	\$	

TOWN OF BLUFFTON
ACCOMODATIONS TAX GRANT APPLICATION BUDGET
EXPENSES

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

Amount

Tourist Transportation

Company Name: _____	\$	
Company Name: _____	\$	

Public Facilities

	\$	
Temporary/Portable Restrooms	\$	
Permanent Restrooms	\$	
Parks	\$	
Parking Lots	\$	
Other (please name): _____	\$	
Other (please name): _____	\$	

Municipality and County Services

	\$	
Dumpster Rental/Trash Hauling	\$	400
Security Provided by Bluffton Police Department	\$	
Security NOT Provided by Bluffton Police Department	\$	
Total of ATAX Eligible Expenses:	\$	8400

Other/Ineligible Expenses

Applicants should list all other project/event expenses that are not eligible for ATAX funds and not listed above.

Item	Amount	
Home preperation	\$	2500
Ticketing and administration	\$	1000
Insurance	\$	900
Security	\$	900
Event Rentals	\$	200
Catering for staff and volunteers	\$	400
Volounteer expenses	\$	500
Miscellaneous	\$	500
Contingency Fund	\$	750
_____	\$	
_____	\$	
_____	\$	
Total of Other/Ineligible Expenses:	\$	7650
Total Project/Event Budget:	\$	15650
Total Project/Event Profit or Loss	\$	5600

Historic Bluffton Foundation

Balance Sheet As of April 30, 2024

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Atlantic Community Operating	0.00
Coastal States # 6767 Operating	11,234.75
Coastal States #2674 - MM	101,924.68
Coastal States #7294- Archives	1,402.42
Coastal States #7856 Restricted	0.00
Petty Cash	400.00
PSB Specified Donation Account	4,964.00
United Community Bank	470,478.21
Total Bank Accounts	\$590,404.06
Accounts Receivable	
Pledges Receivable	0.00
Total Accounts Receivable	\$0.00
Other Current Assets	
Inventory	12,500.00
Promises to Give	69,111.48
Undeposited Funds	0.00
Utility Deposits	475.38
Total Other Current Assets	\$82,086.86
Total Current Assets	\$672,490.92
Fixed Assets	
Accumulated Depreciation	-24,098.21
Computer Equipment	8,053.61
Computer Software	0.00
Deposits on Fixed Assets	0.00
Equipment A/C	10,750.00
Furniture, Fixtures & Equipment	54,681.81
Property - Heyward House	300,000.00
Common Ground	55,174.68
Construction in Progress HH	0.00
Renovations - Heyward House	257,015.57
Total Property - Heyward House	612,190.25
Vehicles - Golf Cart	12,595.00
Vehicles - Truck	5,000.00
Total Fixed Assets	\$679,172.46
Other Assets	
Restricted Asset - Bathroom	0.00
Restricted Asset - Teel House	338,889.40

Historic Bluffton Foundation

Balance Sheet As of April 30, 2024

	TOTAL
Restricted Assets	
Temporarily Restricted	-3,500.00
Due from Big Book Account	3,500.00
Total Temporarily Restricted	0.00
Total Restricted Assets	0.00
Total Other Assets	\$338,889.40
TOTAL ASSETS	\$1,690,552.78
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	18,229.17
Total Accounts Payable	\$18,229.17
Other Current Liabilities	
Deposits 2009 Budget	0.00
Direct Deposit Liabilities	-5,307.20
Note Payable - Line of Credit	0.00
Payroll Liabilities	3,005.49
Rent Received in Advance	0.00
Sales Tax Payable	0.00
SC Dept of Revenue Payable	-40.79
Sales Tax Payable	40.79
Total SC Dept of Revenue Payable	0.00
Total Other Current Liabilities	\$ -2,301.71
Total Current Liabilities	\$15,927.46
Long-Term Liabilities	
N/P SBA Loan	83,837.78
N/P South Atlantic Bank	0.00
Total Long-Term Liabilities	\$83,837.78
Total Liabilities	\$99,765.24
Equity	
Net Assets	
Net Assets W/O Donor Restricti	756,863.47
Net Assets Permanently Restrict	0.00
Net Assets Temp Restricted	0.00
Net Assets Unrestricted	0.00
Net Assets W Donnor Restriction	927,716.75
Total Net Assets	1,684,580.22
Opening Bal Equity surplus	0.00
Retained Earnings	-121.75

Historic Bluffton Foundation

Balance Sheet
As of April 30, 2024

	TOTAL
Temporarily Restricted Equity	-3,500.00
Due to Big Book Account	3,500.00
Total Temporarily Restricted Equity	0.00
Net Income	-93,670.93
Total Equity	\$1,590,787.54
TOTAL LIABILITIES AND EQUITY	\$1,690,552.78



July 10, 2025

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 for the Tour of Homes event scheduled for October 4, 2025 and approves the budget. Our organization approves the project and are committed to financial responsibility for carrying it out to the stage of completion.

Best regards,

A handwritten signature in black ink, which appears to read "Jenif Sommerville". The signature is fluid and cursive.

Jennifer Sommerville
Board Chair
Historic Bluffton Foundation

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